**Appendix E**

**Evaluation Process**

* + - 1. **Evaluation Criteria**

**The following criteria and weightings will be used when evaluating the responses to this mini competition and these may be supplemented or amended following presentations. This must be read in conjunction with the scoring methodology at paragraph 2 of this appendix E.**

|  |  |
| --- | --- |
| **Evaluation Criteria** | **Weighting %** |
| **ITQ Response to Method statements** | **60%** |
| **Presentation** | **10%** |

Method statement responses will be assessed on a scale of [0] to [5] points, as detailed in the table below:

|  |  |
| --- | --- |
|  | **Criteria** |
| 0 | Nil or inadequate response. Fails to demonstrate an ability to meet the evaluation criteria. |
| 1 | Response gave limited coverage of the evaluation criteria with significant gaps in the response and/or serious concerns. |
| 2 | Response partially covered the areas specified in the evaluation criteria but lacking information or detail on a number of areas. |
| 3 | Response covers the majority of aspects in the evaluation criteria with only a few minor gaps in the response. Demonstrates a broad understanding of the requirement but lacks details on how the requirement will be fulfilled. |
| 4 | Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled |
| 5 | Response is completely relevant and excellent overall, covering all aspects of the evaluation criteria. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full |

|  |  |
| --- | --- |
| **Evaluation Criteria** | **Weighting %** |
| **Contractual Arrangement** | **30%** |

**Bid Evaluation Example**

The following examples demonstrate the methodology applied to the evaluation of this invitation to quote, **the weightings shown in this example are for demonstration purposes only.** In the following **examples** the weighting split isquality 60% and price 40%.

Each quality criteria question will be given a mark between 0 – 5. A formula is then applied to determine the weighted score, based on the weighting assigned to the question.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Weighting**  **(W)** | **Bidder A Raw Score**  **(0-5)** | **Bidder A Weighted Score** | **Bidder B**  **Raw Score**  **(0-5)** | **Bidder B Weighted Score** |
| **Quality** | **60%** |  |  |  |  |
| Question 1 | 20% | 2 | 8% | 3 | 12% |
| Question 2 | 15% | 2 | 6% | 3 | 9% |
| Question 3 | 25% | 3 | 15% | 4 | 20% |
| **Total** |  |  | **29%** |  | **41%** |

Step 1: Calculate weighted score for each technical and quality criteria question

Scores of each question are multiplied by the question weighting

E.g. Bidder A’s weighted Score for Question 1 is:

20% / 5 **x** 2 = 8%

*(Question weighting* ***/*** *maximum raw score available* ***~~x~~******\**** *raw score given* ***=*** *weighted score)*

Step 2: Calculate weighted score for the technical and quality criteria questions

Add up weighted scores of all questions

e.g. Bidder A’s total quality criteria weighted score is

8% + 6% + 15% = 29%

The commercial evaluation of the bid will be marked in accordance with Price Scoring Matrix below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Price Scoring Matrix** | | | | |
| \*The lowest price submitted shall be divided by the supplier’s price, and then multiplied by the price weighting percentage (40% in this example) to give the supplier’s Price score.  (i.e. Lowest price submitted/supplier’s price x Price weighting) | | | | |
| Bidder | Column 1: Lowest price (£) | Column 2:  Bidder price (£) | Divide column 1 by column 2, then multiply by price weighting 40 | Price score |
| A | 100 | 100 | 1 | 40% |
| B | 108 | 0.93 | 37.2% |

The weighted total quality and cost scores are then added together to identify the most economically advantageous bid in line with the evaluation criteria set out within this document.

|  |  |  |  |
| --- | --- | --- | --- |
| **Section** | **Weighting** | **Bidder A Score** | **Bidder B Score** |
| **Quality** | | | |
| Question 1 | 20% | 8% | 12% |
| Question 2 | 15% | 6% | 9% |
| Question 3 | 25% | 15% | 20% |
| **Quality Total** | **60%** | **29%** | **41%** |
| **Price** | **40%** | **40%** | **37.2%** |
| **TOTAL** | | **69%** | **78.2%** |

In this example Bidder B would be awarded the Contract as having provided the most economically advantageous bid.

**Moderation**

Following the evaluation of the written offers, bidders will be invited to attend presentation with the evaluation panel (which may include making a short presentation). The purpose of the presentation is to moderate the scores awarded to the written offer, and to clarify any outstanding issues.

**Award of Contract**

Upon conclusion of the evaluation, the scores for price, presentation and quality will be combined to give a total score out of 100 and the bidder with the highest number of points will be awarded the contract.

The bidder to be offered the contract will be advised accordingly via **CSS e-Sourcing portal.** Such award, offered pursuant to this Invitation to Offer, will be on the basis of the most economically advantageous bid, based on the evaluation criteria described above.

Bidders whom it is proposed will not be offered the contract will be advised of this via **CSS e-Sourcing portal** and will be entitled to receive feedback on the relative merits and characteristics of their offer submission compared with that of the accepted offer.

All bidders are advised that they should not take any action for example commencing the delivery of or implementation of services or commencement of works, until the award decision is finalised and communicated to you as above. Bidders should also refrain from undertaking any publicity, marketing or promotional activity until such confirmation is received. In any event, bidders must seek prior approval from the Trust, before undertaking any marketing activity.

The Trust does not bind itself to accept the lowest or any offer, and unless a bidder expressly states that a partial award will not be acceptable, then the right is reserved to accept an offer in part.

Upon conclusion of all the above stages, a formal contract will be entered into between the Trust and the successful bidder.

The terms and conditions governing the contract will be those agreed between CCS and the successful bidder as part of the overarching framework agreement. Unless and until a formal contract is prepared and executed, the bidder’s offer submission, together with the Trust acceptance thereof, shall constitute a binding contract between the parties.