

**Invitation to Quote – Call-Off 15**

**Trialling and Sampling Framework**

**Baseline Assessment Comparability Study**

**June 2015**

**Reception Baseline Assessments.**

**(Contract STA\_0090)**

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| **Tenderer:** |  |
| **Single Point of Contact:** |  |
| **E-mail:** |  |
| **Phone:** |  |

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| **1. Specification of Requirements****1.a. Context** |
| **Introduction*** 1. This Invitation to Quote (ITQ) is for a Call-Off under the 'Trialling Agency Framework’ STA\_0090. **Please note this ITQ outlines the requirements of this call-off while the Trialling Agency Framework details the specifications. Suppliers will need to refer to both documents when completing their Bid.**
	2. A comparability study is required to examine the comparability of baseline outcomes from the different reception baseline providers to ensure comparability between their products. The study will involve no more than 500 schools and 18,000 pupils. The number of schools and pupils involved will depend on the final number of baseline suppliers. There’s currently 6 suppliers. Once the initial recruitment of schools phase is complete on the 30 April 2015 the final number of suppliers will be confimed. Recruited schools will administer two reception baseline assessments to their pupils at the same time, to ensure reliability of results. The study will be designed to provide links through pupils between all of the different reception baseline providers on the approved list.

**Conflict of Interests*** 1. Any supplier on the Trialling and Sampling Framework who is also on the approved list of suppliers the Baseline Assessments will be ineligible to bid for this particular piece of work due to a conflict of interests.

**Freedom of Information and Transparency*** 1. As the executive agency of a public authority, STA is committed to open government and to meeting its legal responsibilities under the Freedom of Information Act 2000 (“FOIA”). Accordingly, Tenderers should be aware that all information submitted to a public authority may need to be disclosed by the public authority in response to a request under the FOIA and that, in addition, DfE may also decide to include certain information in the publication scheme, which it maintains under FOIA.
	2. STA participates fully in the Government’s transparency arrangements. As such, Tenderers should be aware that:
* any contracts or agreements resulting from its procurement exercises may be published in full, subject to limited redactions in line with FOIA exemptions; and
* financial transactions in relation to any contracted goods or services will be published and so cannot be deemed commercially sensitive (see over).
	1. If a Tenderer considers that any of the information included in its Tender is commercially sensitive, it should identify this information in the table below and explain a) what harm may result from disclosure if a request is received, and b) the time period applicable to that sensitivity. Tenderers should be aware that, even where they have indicated that information is commercially sensitive, STA may be required to disclose in response to a request under FOIA or as part of the Government's transparency arrangements. For example, the value of a contract must be made publicly available so this information cannot be deemed commercially sensitive.

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| **Section** | **Commercial Sensitivity** | **Time Period** |
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* 1. The table below shows an example of the level of information disclosed to all bidders following evaluation:

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| --- | --- | --- | --- | --- | --- |
|  | **Technical threshold result** | **Relative Quality Score** | **Relative Price Score** | **Weighted Combined Score** | **Rank for Compliant Bidders** |
|  |  | **70%** | **30%** |  |  |
| **Tenderer A** | **PASS** | **0.73** | **0.12** | **0.55** | **2** |
| **Tenderer B (WINNER 1)** | **PASS** | **1.00** | **1.00** | **1.00** | **1** |

**Scope of Services Required*** 1. This document sets out the Specification of Requirements (SOR) for recruiting and communicating with schools to participate in the comparability study.
	2. The STA have provided general guidance regarding the number of schools as a means to standardise costings only. The Supplier is responsible for designing and implementing a school recruitment and management strategy. STA will provide the Supplier with a list of DfE numbers from which to recruit based on the Supplier’s recruitment and management strategy. STA will supply sample size requirements for each assessment combination.
	3. The Supplier is responsible for recruiting schools, from the sample provided by STA, which have confirmed they will be using one of the approved baseline assessment suppliers.
	4. The Supplier will be responsible for effective communication with the schools to ensure the correct assessments are taken in the the correct order by their pupils.
	5. The supplier will be responsible for paying incentives and assurance payments to participating schools.
	6. The table below provides the high level requirements with respect to this specification. It outlines what aspects of the Framework Agreement will be required in this Call Off.

Services out of scope 1. STA will communicate with reception baseline suppliers
	1. Reception baseline suppliers to disseminate materials to schools
	2. Reception baseline suppliers will support schools in administering the assessments
	3. Reception baseline suppliers will capture data of the assessment outcomes
	4. STA will analyse the study data
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| **Core** | **Baseline Comparability Study** |
| Project Management | ✓ |
| Recruiting schools | ✓ |
| \*Informing schools of statutory participation | X |
| Recruit and train administrators | X |
| Recruitment, management and payment of markers | X |
| Printing | X |
| Collation and distribution | X |
| Administration  | X |
| Helpline | ✓ |
| Systems management | X |
| Handling pupil background data | X |
| Script Management during marking | X |
| Sourcing a venue for the marker training event | X |
| Marking management | X |
| Data Capture | X |
| Recruitment Report | ✓ |
| **Optional Services** |  |
| Disseminating an incentive and assurance payment to participating schools  | ✓ |
| Drawing the sample | X |

**Key**

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| Included in trial | ✓ |
| Not included in trial | X |

\*Informing schools of statutory participation - Please note that participation in the comparability study is not Statutory.

| * 1. The project deliverables and outputs (milestones) are provided in table 1.b. below. Timelines and project plans will need to be presented and discussed at the start-up meeting.
	2. The dates in table 1.b. are indicative dates and the Supplier can propose alternative dates. The exceptions to this are the project fixed dates which are non-negotiable and are listed in table **1.a** below:
	3. Table 1.a - **Fixed milestone dates**

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| --- | --- | --- |
| **No.** | **Milestone** | **Fixed date** |
| 1 | Project Start-up meeting | **12 May 2015** |
| 2 | Recruitment of priority schools completed | **5 June 2015** |
| 3 | Submission of report on number of priority schools / pupils recruited | **By 12 June 2015** |
| 4 | Submission of report on number of remaing schools / pupils recruited | **By 10 July 2015** |
| 5 | Communication to priority schools | **5 June 2015** |
| 6 | Communication to remaining schools |  **By 17 July 2015** |
| 7 | Provide reminder communications to all schools | **Early Sept 2015** |

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The Project deliverables/outputs are provided in the table below, and individual deliverables or outputs are indicated as Critical Steps where appropriate. All deliverables and outputs are categorised as mandatory and it is essential that you confirm that you can meet them in full. Unless indicated below, all dates are negotiable with STA. Failure to provide confirmation in your proposal documents may result in your proposal being rejected.

The specific date for all Requirements 1 – 7 must be included within the project plan in the response to the Technical Evaluation.

| **1. Specification of Requirements****1.b. Deliverables and Outputs**  |
| --- |
| **No.** | **Milestones** | **Due Date** |
| **1** | **Project Management** |
| 1.1 |  | Start-up meeting: The Supplier to attend a face-to-face start-up meeting with STA. Outline project plans, risks / issues, reporting structures, Supplier’s recruitment and management strategy, exit and transition plan, will be discussed at the project start-up meeting. | **Tuesday 12 May 2015** |
| 1.2 |  | Project meetings: The Supplier to attend regular project meetings as agreed with STA, providing regular management information, progress reports, risks and issue reports in advance of the meeting.Maintain and manage risk and issue logs. Use project meetings to highlight the risks that have changed RAG status or to escalate issues. Full risk and issues logs will be discussed at the start-up meeting and monitored through senior supplier meetings during the course of the project. | Weekly  |
| **2** | **Exit and Transition** | The Supplier must submit a Trialling and Sampling Framework exit and transition plan. | 1 month after contract commences |
| **3** | **Recruitment of schools** |
| 3.1 |  | School recruitment and management strategy submitted to STA.  | As evaluation question |
| 3.2 |  | The Supplier must contact LAs to inform them of schools being invited for inclusion in the study before schools are contacted. Priority must be given to those schools being recruited for the baseline assessment that requires a training session between 1 June and 18 July.The Supplier must recruit sufficient schools from the provided sample such that at least the minimum numbers of pupils required sit each assessment combination. | May 2015**5June 2015**3 July 2015 |
| **4** | **Submission of report on number of schools / pupils recruited.** | The Supplier must provide STA a report showing the priority schools and pupils to test combination, confirmation of number of pupils per school to demonstrate the representativeness of the sample recruited. The Supplier must provide STA a report showing the remaining number and allocation of schools and pupils to test combination, confirmation of number of pupils per school to demonstrate the representativeness of the sample recruited.  | **By 12 June 2015****By 10 July 2015** |
| **5** | **Communications to schools** | Inform the priority schools of additional baseline assessment they have been assigned, and the order in which the two assessments must be taken.Inform remaining schools of additional baseline assessment they have been assigned, and the order in which the two assessments must be taken, before end of Summer term. Provide reminder of same information at beginning of Autumn term to all schools. |  **5 June 2015****By 17 July 2015****Early Sept 2015** |
| **6** | **Recruitment report** | The Supplier must produce a report with the level of detail and in the format set out in the Functional Requirements (section 1.c.).Recruitment report. | 30 September 2015 |
| **7** | **Incentives and assurance payments** | The Supplier may suggest,and include in the school recruitment strategy with prior agreement from STA; * any incentives that may facilitate school recruitment,
* any assurance payments that will ensure all instructions have been followed correctly, and in the right order.
 | May – June 2015October 2015 |

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| **1. Specification of Requirements****1.c. Functional Requirements** |
| **Subjects** | Reception Baseline Assessments  |
| **Age of pupils assessed** | Reception |
| **Sub-Contractors** | The Supplier shall ensure that each and every proposed sub-Contractor, consortium member and adviser abides by the requirements of the Framework Agreement and this ITQ. |
| **Project Management** | Project manager to attend weekly Checkpoint meetings to review the timeline, discuss the progress of the project, highlight any risks, issues and actions.Provide weekly Checkpoint reports and risk / issue logs one working day in advance of the weekly meeting.  |
| **Management Information** | The following MI is required weekly throughout the project:* School recruitment + total number of pupils + cohort size + high level sample coverage (on going throughout recruitment)
 |
| **Exit and Transition** | With reference to section G7 of the Trialling and Sampling Framework, the exit and transition plan must be signed off by STA no later than 1 month after the commencement date.  |
| **Start-up Meeting** | Supplier to provide the following documentation at least 2 days in advance of the start-up meeting: * Detailed project risk and issue log for review and joint sign-off
* Detailed project timeline
* Any changes, suggested by STA, to the School recruitment and management strategy that was provided in the bid.
* Draft exit and transition plan
 |
| **Sample Design of combinations** | See Appendix B for an example of the Sample design. The example shows a maximum of 60 assessment combinations, using a maximum of 300 pupils per combination. This is subject to change depending on the final number of baseline suppliers. We will provide this information by the 25 May 2015.  |
| **School Sample and Recruitment** | The sample will be taken from schools that have opted into a baseline assessment, where there will be an equal number that have chosen each assessment as their first choice. It is expected that all reception pupils in a recruited school will participate in the study.The Supplier is responsible for recruiting the precise number of schools they need to achieve adequate pupil numbers, based on an average of 37 pupils per school. STA will provide the Supplier with a list of DfE numbers for the selected schools and their category for each stratifier. At this time it is expected that the stratifiers are region and deciles of school progress. This will enable the Supplier to provide an achieved sample representation against the schools provided. STA will not provide any additional information, such as contact details, for the selected schools. The Supplier will be responsible for sourcing up-to-date contact details. The Supplier will recruit from this sample.The supplier will need to prioritise the recruitment of schools who are assigned the baseline assessement that requires a training session from 1 June – 18 July 2015. The training sessions will take place regionally.**Top-up Samples**Due to time constraints there will be no Top-up Samples avaliable, therefore please include any contingency required in theSchool recruitment and management strategy document. |
| **Communications to Schools** | The supplier will inform the priority schools of additional baseline assessment they have been assigned, and the order in which the two assessments must be taken.The supplier will inform the remaining schools of the additional baseline assessment they have been assigned, and the order in which the two assessments must be taken, before the end of the Summer term.The supplier will also provide a reminder of the same information to all schools at the beginning of the Autumn term. |
| **Incentives and assurance payment** | A maximum of £200 incentive will be available per school to encourage participation in the study. A further £180 assurance payment will be made to schools who have correctly administered both assessments, and have done so in the right order. STA supports withholding all or part of the incentive and assurance payment to individual schools until both assessments have been completed in the correct order and pupil data has been received by both Baseline Providers. Some schools will require further cover of expenses for a training day with one of the approved baseline providers.The Supplier may suggest any incentives or inducements that may facilitate school recruitment in the school recruitment strategy. The use of any incentives must be agreed with the STA before any schools are contacted.  |
| **Recruitment report** | The Recruitment report should include a comparison between the received and achieved sample to show representativeness of the stratifiers and a detailed summary of the recruitment activity |
| **Helplines** | Suppliers will be required to provide a helpline to deal with calls regarding the recruitment, payment and communication to schools involved in the Compaprabilty study at all times during the working day. STA will not require MI on this. |

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| **1. Specification of Requirements****1.d. Performance Requirements** |
| * 1. Managing key performance requirements are essential to delivering this project on-time and in full, and will be monitored throughout the life of the project and form part of the contractual relationship. Please review and confirm acceptance within your submission.
	2. The following table lists the key performance requirements for this Contract. Failure to complete one or more of these to the required standard will impact upon payment with reference to the Payment Milestones schedule in section 1.f.
 |
| **No.** |  | **Service** **Requirement** | **Performance** **Measure** |
| 1 | Project management | Full attendance at project start-up meeting, , project management meetings and lessons learnt meeting (face to face and teleconference as necessary). Progress reports, recruitment and management strategy, exit and transition plan, including risk and issues reporting to be submitted and approved. Daily management information (MI) provided on all deliveries of secure materials to and from administrators.Issue reports to be written for any deviations from the agreed contract. Security incident reports to be written for all breaches and potential breaches of security and confidentiality. | 100% – meeting documents to be provided at least 24 hours prior to organised project meetings. MI submitted daily during agreed windows. |
| 2 | Exit and transition | The Supplier provided and maintained a detailed, fully resourced and costed exit and transition plan. | 100% |
| 3 | Recruitment of schools | Sufficient number of appropriate and representative schools recruited on time. | 100% |
| 4 | Submission of report on number of schools / pupils recruited. | Report submitted to STA, showing allocation of schools to test combinations, and that minimum number for each booklet combination for each test was achieved, matching sample stratifiers. | 100%  |
| 5 | Communications to schools | Communication with schools is executed appropriately, and to appropriate timescale. | 100% |
| 6 | Recruitment report | Recruitment report should include a comparison between the received and achieved sample on region and deciles of school progress to show representativeness, and a detailed summary of the recruitment activity.Report content to be reviewed and agreed by STA prior to handover. | Completed and submitted to STA by required date to agreed quality standard. |
| 7 | Incentives and assurance payment  | Incentives to be paid to facilitate school recruitment. The assurance payement to be paid when both assessments have been completed and where applicable all or part of the payment has been withheld if both assessments have not been carried out in the correct order. | 100% |

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| **1. Specification of Requirements****1.e. Payment Milestones** |
| Payment will follow the completion of the milestones listed below: |
| **Milestone** (see Deliverables and Outputs table section 1.b. for further detail) | **Payment due date** | **Payment %** |
| 2 | Exit and transition plan  |  August 2015 | 20% |
| 3 | Recruitment of schools |
| 4 | Submission of report on number of schools / pupils recruited, allocated. |
| 1 | Project management | October 2015 | 80% |
| 5 | Communications to schools |
| 6 | Recruitment report |
| 7 | Incentives and assurance payments |

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| **1. Specification of Requirements****1.f. Instructions to Tenderers** |
| * 1. Tenderers should read these instructions carefully before completing their Tenders.
	2. These instructions are designed to ensure that all Tenderers are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified.
	3. The Tenderer shall not make contact with any other employee, agent or consultant of STA who is in any way connected with this ITQ exercise during the period of this ITQ exercise, unless instructed otherwise by the Test Development Procurement Manager at STA, Mark Horton.
	4. All material issued in connection with this ITQ shall remain the property of STA and shall be used only for the purpose of this ITQ exercise. Any confidential STA Information shall either be returned to STA or securely destroyed by the Tenderer, with the permission of the STA, at the conclusion of the exercise.
	5. The Tenderer shall ensure that each and every proposed sub-Contractor, consortium member and adviser abides by the terms of these instructions and by the requirements of the Trialling and Sampling Framework Agreement (STA\_0090) and this ITQ.
	6. STA shall not be committed to any course of action as a result of:
* Issuing this ITQ or any invitation to participate in this ITQ exercise;
* Communicating with a Tenderer or a Tenderer’s representatives or agents in respect of this ITQ exercise; or
* Any other communication between STA (whether directly or by its agents or representatives) and any other party.
	1. Tenderers shall accept and acknowledge that, by issuing this ITQ, STA shall not be bound to accept any Tender and reserves the right not to conclude a contract for the services for which Tenders are invited.
	2. STA reserves the right to amend, add to, or withdraw all or any part of this ITQ at any time during the ITQ exercise.

**Tender Validity*** 1. Your Tender should remain valid for a period of 30 days from the submission date.

**Proposed Contract*** 1. Contracts for the provision of a Technical Pre-Test will be let under the STA’s Trialling and Sampling Framework Agreement (STA\_0090).

**Clarification Questions*** 1. Clarification Questions should be submitted by e-mail only to: testdevelopment.sta@education.gsi.gov.uk, cc’d to mark.horton@education.gsi.gov.uk. No further requests for clarifications will be accepted after the date shown in the table below. All communications should be clearly headed "Baseline Assessments Comparability Study Call-Off 15" and should include the name, contact details and position of the person making the communication.
	2. STA will endeavour to answer all questions as quickly as possible, but cannot guarantee a minimum response time.
	3. In order to ensure equality of treatment of Tenderers, STA intends to publish the questions and clarifications raised by Tenderers, together with the STA’s responses (but not the source of the questions), to all participants on a regular basis via email.
	4. Tenderers should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if STA at its sole discretion either does not consider the query to be of a commercially confidential nature, or considers the query to be one which all Tenderers would potentially benefit from seeing, then STA will either:
* Invite the Tenderer submitting the query to either declassify the query and allow the query, along with the STA’s response, to be circulated to all Tenderers; or
* Request the Tenderer, if it still considers the query to be of a commercially confidential nature, to withdraw the query.
	1. STA reserves the right not to respond to a Clarification Question or to circulate such a question where it considers that the answer to that question would be likely to prejudice its own commercial interests.

**Preparation of Tender*** 1. Tenderers are solely responsible for their costs and expenses incurred in connection with the preparation and submission of their Tender. Under no circumstances will STA, or any of its advisers, be liable for any costs or expenses borne by Tenderers, sub-contractors, suppliers or advisers in this process.
	2. Tenders must contain details of fixed and variable costs for Trialling and a plan to show the potential number of schools for each subject and potential number of visits. Costs must be transparent and presented in a way which will allow DfE to pre-estimate costs of call-off orders.
	3. Tenderers are required to complete and provide all information required by STA. Failure to comply with the ITQ requirements may lead STA to reject a Tender.
	4. STA relies on Tenderers' own analysis and review of information provided. Consequently, Tenderers are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their Tenders and to undertake any investigations they consider necessary in order to verify any information provided to them by STA during the procurement process.

**STA Point of Contact*** 1. Unless stated otherwise in these instructions or in writing from STA, all communications from Tenderers (including their sub-contractors, consortium members, consultants and advisers) during the period of this procurement exercise must be directed to the contact identified above.
	2. All communications should be clearly headed " Baseline Assessments Comparability Study Call-Off 15" and should include the name, contact details and position of the person making the communication.

**Confidentiality*** 1. All information supplied by STA to you must be treated in confidence and not disclosed to third parties except insofar as this is necessary to obtain sureties or quotations for the purposes of submitting the Tender.
	2. All information supplied by Tenderers to STA will similarly be treated in confidence except for the disclosure of such information as may be required in accordance with the requirements of UK government policy on the disclosure of information relating to government contracts including the Freedom of Information Act and forthcoming transparency procedures.

**Conflict of Interest*** 1. Any known conflicts of interest, or any potential conflicts of interest that may be reasonably foreseen, should be declared in the Tender.

**Value Added Tax (VAT)*** 1. STA is VAT registered. It is also an “eligible body” as classified in VAT Notice 701/30 "Education and Vocational Training". Proposals must therefore include VAT where applicable. Where any doubt exists, Tenderers are expected to have sought clarification from HM Customs and Excise. Prices in the Tender will be accepted on this basis.
	2. Tenderers are requested to set out their understanding of the VAT status of the contract based on the services to be provided and the status of STA. There will be no adjustment to the contract sum if VAT is subsequently found to be payable.

**Submission of Tenders*** 1. The Tender must be submitted in the format specified by completing the Tenderer's Response using Arial 11 font and in English and using pounds sterling. Where applicable, word limits must be adhered to and material in excess of these limits will not be evaluated.
	2. Tenderers must submit their responses by email to TendersTD.STA@education.gsi.gov.uk in the following format:
		+ 1. One complete and signed electronic version in MS Word 2010 (or compatible) format labelled **'priced'** of their Tender and with their organisation name in the document title; and
			2. One electronic version in MS Word 2010 (or compatible) format labelled **'not priced**' of their Tender excluding the pricing information and with their organisation name in the document title.
	3. Tenders must be received by 12:00 noon on 1 April 2015.
	4. Tenders will be accepted at any time up to this deadline but will not be opened or evaluated until the deadline has passed.
	5. Any Tender received after the deadline may be rejected unless the Tenderer can provide irrefutable evidence that the Tender was capable of being received by the due date and time and that delivery failure was beyond their reasonable control.

**Right to Reject/Disqualify*** 1. STA reserves the right to reject or disqualify a Tenderer where:
* The Tenderer fails to comply fully with the requirements of this ITQ, including proper completion of the format for response, or is guilty of a serious misrepresentation in supplying any information required in this document; or
* There is a change in identity, control, financial standing or other factor relating to the Tenderer that impacts on the selection and/or evaluation process.

**Debriefing*** 1. Following the conclusion of the ITQ exercise, all unsuccessful Tenderers will have the opportunity of a debriefing. Unsuccessful Tenderers should notify STA by email that they wish to be debriefed. STA will aim to debrief unsuccessful Tenderers within 10 working days of receiving such a request.
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| **1. Specification of Requirements****1.g. Procurement Timescales** |
| **Date**  | **Activity** |
| 18 March 2015 | STA/DfE issue ITQ |
| 12:00 on 25 March 2015 | Questions on ITQ to STA by midday |
| 12:00 on 1 April 2015 | Bids on ITQ due to STA by midday |
| 8 May 2015 | Contract awarded no later than |
| 12 May 2015  | Contract start-up meeting – face to face held in either Coventry or London |

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| **1. Specification of Requirements****1.h. Tender Evaluation Methodology** |
| * 1. The objective of the Invitation to Quote (ITQ) is to evaluate the technical and pricing proposals of Suppliers, who have been awarded a Trialling and Sampling Framework Agreement, to meet DfE's requirements in 2015. The ITQ will award a single call-off contract to the Supplier offering the most economically advantageous compliant proposal.
	2. The most economically advantageous compliant tender will be determined by combining a technical evaluation of the proposed solution (Part A), and a commercial evaluation of the proposed price (Part B) according to the following weightings:
* Technical Evaluation 70%
* Commercial Evaluation 30%
	1. The ITQ evaluation process will consist of the following phases:
* Opening and compliance checks for the completeness of the response to the required format including the Tenderer's declaration
* Technical evaluation of the un-priced responses by an independent evaluation panel according to the scoring criteria set out for each question in Part A, and with a minimum score threshold of 50% across the technical section.
	1. Each question in Part A will receive a score of: 0, 1, 2, 3, 4 or 5 (0 being the lowest and 5 being the highest).
	2. Commercial evaluation of the priced responses (Part B) for qualified and compliant bids will only be undertaken on those that have exceeded the technical evaluation threshold of 50%.

**Call-off Contract Award Decision*** 1. The technical and commercial evaluation scores will then be combined using the following methodology:
* Technical score = 100 x (bidder's technical score / best technical score)
* Price score = 100 x (lowest price / bidder's price)
* Combined score = (70% x technical score) + (30% x price score)
	1. Following evaluation, a summary of the relative quality score and relative price score will be fed back to all bidders. An example of the level of information provided is given below:

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| --- | --- | --- | --- | --- | --- |
|  | **Technical threshold result** | **Relative Quality Score** | **Relative Price Score** | **Weighted Combined Score** | **Rank for Compliant Bidders** |
|  |  | **70%** | **30%** |  |  |
| **Tenderer A** | **PASS** | **0.73** | **0.12** | **0.55** | **2** |
| **Tenderer B (WINNER 1)** | **PASS** | **1.00** | **1.00** | **1.00** | **1** |

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| **2. Annex A: Suppliers Proposal****Q.1a) Provide a detailed project plan for this work. (Weighting 40% for both parts)**The project plan must include:* A proposed timeline with specified dates for all key milestones in the process, including (but not limited to) those listed in the Deliverables/Output section (Section 1.b).
* The identification of all risks relevant to this piece of work and associated contingencies. (STA requires a service provider which will be active in identifying risks and opportunities associated with the procurement process and the documentation it reviews, in the context of the Procurement Regulations and also ensuring that the interests of STA are adequately protected at all times.)
* An outline of the approach that will be taken to ensure that all key administrative and technical requirements are met to time and quality, including:
* All other security-critical aspects

**Q.1b) In no more than 350 words, describe your approach to managing the relationship with STA .** |
| **Scoring** |

|  |  |  |
| --- | --- | --- |
| **Evidence** | **Score** | **Definition** |
| **None** | 0 | No evidence demonstrated |
| **Very Poor** | 1 | Very little evidence of appropriate skills or experience relating to these criteria. Strong reservations would exist over the bidder’s capability to perform satisfactorily. |
| **Poor** | 2 | Some evidence of appropriate skills or experience relating to these criteria. Some reservations would exist over the bidder’s capability to perform satisfactorily. |
| **Adequate** | 3 | Reasonable evidence of appropriate skills and experience has been provided in relation to these criteria. Displays an understanding of the work required with some evidence of innovative thinking. |
| **Good** | 4 | Good evidence of appropriate skills and experience has been provided in relation to these criteria. Displays a good understanding of the work required with extensive evidence of innovative thinking. |
| **Excellent** | 5 | Exceeds expectations. Very strong evidence of appropriate skills and experience in relation to these criteria. Adds extra value and it is clear the bidder has extensive knowledge of the issues it faces. No reservations. |

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| **Enter Response** |
| **Q2) Resource Strategy (Weighting 20%)**Describe your resource strategy for delivering the services outlined in this ITQ including:* An organisation chart relevant to this contract, showing percentage of each individual’s time allocated to this project.
* Abridged CVs for named project staff showing relevant expertise and qualifications (single combined pdf / document for CVs).
* Management of sub-contractors, their roles, responsibilities and staff numbers.
* Availability of additional capacity to address contingencies.
 |
| **Scoring** |

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| --- | --- | --- |
| **Evidence** | **Score** | **Definition** |
| **None** | 0 | No evidence demonstrated |
| **Very Poor** | 1 | Very little evidence of appropriate skills or experience relating to these criteria. Strong reservations would exist over the bidder’s capability to perform satisfactorily. |
| **Poor** | 2 | Some evidence of appropriate skills or experience relating to these criteria. Some reservations would exist over the bidder’s capability to perform satisfactorily. |
| **Adequate** | 3 | Reasonable evidence of appropriate skills and experience has been provided in relation to these criteria. Displays an understanding of the work required with some evidence of innovative thinking. |
| **Good** | 4 | Good evidence of appropriate skills and experience has been provided in relation to these criteria. Displays a good understanding of the work required with extensive evidence of innovative thinking. |
| **Excellent** | 5 | Exceeds expectations. Very strong evidence of appropriate skills and experience in relation to these criteria. Adds extra value and it is clear the bidder has extensive knowledge of the issues it faces. No reservations. |

 |
| **Enter Response** |

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| **Q3) School recruitment and management strategy** **(Weighting 40%)**If you are successful with your bid what will your school recruitment and retention management strategy for this trial will be? In your response please include, at least, details of the following points:* How will you recruit the number of schools you need to achieve adequate pupil numbers as noted in the ITQ? What strategies will you employ to encourage schools to participate?
* What mitigations and contingencies will be enacted if schools prove difficult to recruit, or decide to pull out between the Summer and Autumn terms?
* What incentives or inducements would you suggest to facilitate school recruitment? Please note, any incentives and / or inducements must be agreed with the DfE before any schools are contacted.
* How will you ensure sample representativeness across the sample?
* How will you allocate schools to baseline assessments to ensure sample representativeness?
* What is the number of schools you need to recruit to achieve adequate pupil numbers as noted in the ITQ, and what is your rationale for these figures?
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| **Scoring** |

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| --- | --- | --- |
| **Evidence** | **Score** | **Definition** |
| **None** | 0 | No evidence demonstrated |
| **Very Poor** | 1 | Displays very little evidence of understanding of the work. Strong reservations would exist over the bidder’s capability to perform satisfactorily. |
| **Poor** | 2 | Displays some evidence of understanding of the work. Some reservations would exist over the bidder’s capability to perform satisfactorily. |
| **Adequate** | 3 | Displays reasonable evidence of understanding of the work with some evidence of innovative thinking. |
| **Good** | 4 | Displays a good understanding of the work required with extensive evidence of innovative thinking. |
| **Excellent** | 5 | Exceeds expectations. Displays very strong evidence of understanding of the work. Adds extra value and it is clear the bidder has extensive knowledge of the issues it faces. No reservations. |

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| **Enter Response** |
| **Q4) Sub-contractors**Please provide details of all sub-contractors, consortium members and advisers you intend to use if successful with your bid. Please provide:* Contact details and full physical address, including an individual named contact
* Details of the elements that they will have responsibility for in this ITQ
* Confirmation that each sub-contractor, consortium member and adviser if aware of and will adhere to the confidentiality and security requirements on the Framework Agreement and this ITQ.
 |
| ***Not scored – for information purposes only.*** |
| **Enter Response** |

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| **3. Pricing Schedule**  |
| * 1. Please complete the detailed Cost Breakdown spreadsheet (Appendix A), click on the icon below.
	2. Provide costs based on 500 schools for evaluation purposes, as this is the maximum number of schools based on six suppliers.

If the bidder feels the expected number of schools is likely to vary significantly from these figures, please give an indication of the estimated numbers and the reasoning behind the difference.* 1. The costs provided must include all charges that are applicable to the delivery of the DfE / STA Requirements. The Total Price submitted will be the fixed price included within any subsequent contract and there will be no adjustment to the contract pricing if additional charges are subsequently identified.
		1. All amounts stated in this Agreement including supporting Schedules are inclusive of VAT where applicable unless the contrary is expressly stated.
		2. The Fixed Price to deliver the project in full is £ (incl. VAT) and is split into three instalments which correspond to the Deliverables and Outputs 1.b. and Payment Milestones section 1.e.
 |

**4. Appendices**

**Appendix A – Cost Breakdown Spreadsheet**



**Appendix B – Sample Design**

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**Appendix C – Example of progress report**



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| 1. **Declaration by Tenderer**
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| *I have examined DfE's requirements under the Contract STA\_0090 Trialling Agency Framework and proposed Call-Off terms and conditions and hereby offer to enter into a contract with DfE/STA for the required services and at the rates and prices set out in my enclosed technical and pricing proposal.**I furthermore warrant that:** *I have the required corporate authority to sign this tender.*
* *There has been no breach of DfE's confidentiality requirements.*
* *There is no conflict of interest in our proposed delivery of this service.*
* *There has been no collusion with other Tenderers or potential Tenderers.*
* *There has been no canvassing of DfE/STA staff.*
* *The Tender shall remain open for acceptance by DfE/STA for a period of 30 days after the due date for return of tenders.*
 |

|  |  |
| --- | --- |
| Signed | *[Please complete]* |
| Name |  |
| Date |  |
| Role |  |
| Authorised to sign tenders on behalf of [organisation name] |  |