

## Section 3: Evaluation Criteria

### Selection Questionnaire

- 3.1 Tenderers are required to complete the Selection Questionnaire (SQ) set out on the Tender Portal. The SQ is located as a link on the Tender Portal. The SQ is a Pass / Fail response with no specific evaluated sections.

### Quality Evaluation

- 3.2 The scored Quality criteria will account for 60% of the total score. These will be assessed as set out in Section 4. Questions that are labelled “For Information Only” and “Pass/Fail” are not evaluated.
- 3.3 Any word limits, referred to on the Tender Portal for a question are the **maximum** number of words applicable to the relevant response. No additional information or supplementary documentation should be appended to these responses. Any additional information provided with a Tender response will be disregarded and will not be scored as part of the evaluation process.

### Commercial Evaluation

- 3.4 The scored Commercial criteria will account for 20% of the total score.

### Social Value Evaluation

- 3.5 The scored Social Value criteria will account for 10% of the total score. The responses in this section will be evaluated in line with the scoring criteria at Table 2.

### Supplier Charter Evaluation

- 3.6 The scored Supplier Charter criteria will account for 10% of the total score. The responses in this section will be evaluated in line with the scoring criteria at Table 2.

## Section 4: Evaluation methodology

### Evaluation Methodology

- 4.1 The Crown Estate will conduct an evaluation of the Tenders received. The Contract will be awarded on the basis of the most economically advantageous tender and in accordance with the methodology set out below. Tenders must be submitted alongside the completed Annex 1 Form of Tender in the ITT (and for the avoidance of doubt, Tenders must include all mandatory documents as detailed in Annex 5 (Supplier ITT Tender Return Checklist). Failure to submit a completed Form of Tender will render the submission incomplete and not submitted within the Submission Deadline. This is to form Stage 1 of the evaluation process.

### The Evaluation Team

- 4.2 An evaluation team will undertake a comprehensive, systematic and consistent evaluation of

each Tender. The evaluation team will be made up of subject matter experts of The Crown Estate.

### **General information on the evaluation process**

4.3 Tenders will be subject to a six (6) stage evaluation process:

Stage 1 – Initial Screening Assessment ;

Stage 2 – Selection Questionnaire (Assessment of completed Selection Questionnaire on the Tender Portal);

Stage 3 – Quality Evaluation (Evaluation of completed Technical envelope on the Tender Portal);

Stage 4 – Social Value Evaluation (Evaluation of completed Social Value on the Tender Portal);

Stage 5 – Supplier Charter Evaluation (Evaluation of completed Supplier Charter on the Tender Portal); and

Stage 6 – Commercial Evaluation (Evaluation of completed Commercial envelope on the Tender Portal).

### **Stage 1 – Initial Screening Assessment**

4.4 Tenders will be subject to an initial screening assessment to confirm the Tender includes all the mandatory documents set out in the checklist at Annex 5 (Supplier ITT Tender Return Checklist) of this ITT.

4.5 Tenders that are not substantially complete, which are non-compliant with the requirements of the ITT as noted in the Instructions to Tender Section 1, or which do not include all the mandatory documents referred to in Annex 5 (Supplier ITT Tender Return Checklist) may be excluded at this stage and not considered further.

### **Stage 2 – Selection Questionnaire Evaluation**

4.6 Tenderers who successfully pass the Stage 1 Initial Screening Assessment will be subject to a suitability assessment review made up of the questions set out in the SQ set out on the Tender Portal. The Crown Estate will evaluate the SQ for all Tenders that are not excluded in Stage 1 as set out above.

### **Stages 3 to 6 – Quality, Commercial, Supplier Charter and Social Value Evaluations**

4.7 During Stages 3 – 6, The Crown Estate reserves the right to request clarification from Tenderers, as appropriate, to assist with its evaluation of the Tenders. Clarifications from The Crown Estate will be raised with the Tenderer via the Tender Portal.

4.8 The successful Tender will be the Tender which has achieved the best overall score. The Tenders will be assessed according to the criteria set out below in Table 2 and each section

will carry the following weightings. The sub criteria for each section are identified in Table 1:

STAGE	SECTION	PERCENTAGE %
3	Quality	60
4	Social Value	10
5	Supplier Charter	10
6	Commercial	20

**Table 1 – Question Detail and Weighting**

<b>Question number</b>	<b>Quality Question</b>	<b>Question Weighting</b>
	<b>Section Weighting 15%</b>	
<b>3.1</b>	<b>Account Management</b>	<b>25%</b>
<b>3.2</b>	<b>Account Management</b>	<b>25%</b>
<b>3.3</b>	<b>Account Management</b>	<b>50%</b>
	<b>Section Weighting 10%</b>	
<b>4.1</b>	<b>Mobilisation</b>	<b>100%</b>
	<b>Section Weighting 30%</b>	
<b>5.1</b>	<b>Statement of Service</b>	<b>25%</b>
<b>5.2</b>	<b>Statement of Service</b>	<b>25%</b>
<b>5.3</b>	<b>Statement of Service</b>	<b>25%</b>
<b>5.4</b>	<b>Statement of Service</b>	<b>25%</b>
	<b>Section Weighting 5%</b>	
<b>6.1</b>	<b>Key Performance Indicators</b>	<b>100%</b>
<b>Question number</b>	<b>Supplier Charter Question</b>	<b>Question Weighting</b>
	<b>Section Weighting 2%</b>	
<b>9.1</b>	<b>Health, Safety &amp; Wellbeing</b>	<b>33.33%</b>
<b>9.2</b>	<b>Health, Safety &amp; Wellbeing</b>	<b>33.33%</b>
<b>9.3</b>	<b>Health, Safety &amp; Wellbeing</b>	<b>33.33%</b>
	<b>Section Weighting 1%</b>	
<b>10.1</b>	<b>Sustainability</b>	<b>20%</b>
<b>10.2</b>	<b>Sustainability</b>	<b>20%</b>
<b>10.3</b>	<b>Climate &amp; Net Zero</b>	<b>20%</b>
<b>10.4</b>	<b>Climate &amp; Net Zero</b>	<b>20%</b>

10.5	Support to Local & Social Enterprises	20%
	Section Weighting 1%	
11.1	Ethical and Inclusive Practices	14.29%
11.2	Ethical and Inclusive Practices	14.29%
11.3	Ethical and Inclusive Practices	14.29%
11.4	Ethical and Inclusive Practices	14.29%
11.5	Ethical and Inclusive Practices	14.29%
11.6	Diversity, Equity & Inclusion	14.29%
11.7	Real Living Wage	14.29%
	Section Weighting 3%	
12.1	Information Security	33.33%
12.2	Information Security	33.33%
12.3	Data Residency	33.33%
	Section Weighting 3%	
13.1	Data Protection & GDPR	16.67%
13.2	Data Protection & GDPR	16.67%
13.3	Data Protection & GDPR	16.67%
13.4	Data Protection & GDPR	16.67%
13.5	Data Protection & GDPR	16.67%
13.6	Data Protection & GDPR	16.67%
<b>Question number</b>	<b>Social Value Question</b>	<b>Question Weighting</b>
	Section Weighting 10%	
14.1	Social Value	50%
14.2	Social Value	50%
	<b>Total available</b>	

**Table 2 – Scoring Criteria**

<b>Scoring 0-5</b>	<b>Scoring Criteria</b>
0	(No response) Failure to submit an answer or confirmation.
1	(Poor response) The question is not directly addressed, and the answer demonstrates minimal understanding of the subject.
2	(Weak response) The answer only addresses some aspects of the question and/or demonstrates a partial or unfocused understanding of the subject matter.
3	(Satisfactory response) The answer addresses some aspects of the question and demonstrates sufficient understanding of the subject matter, although there may be some uncertainty or gaps in how it applies to this project.
4	(Good response) The answer addresses all aspects of the question and demonstrates a clear understanding of the subject matter with good consideration of how it applies to this project.
5	(Excellent response) The answer addresses all aspects of the question in a high level of detail that demonstrates a clear understanding of the subject matter and a thorough consideration of how it applies to this project.

- 4.9 Each of the "scored" Quality Criteria, Supplier Charter Criteria and Social Value Criteria in Table 1 will be marked out of 5 using the scoring scale set out in Table 2. Each member of the evaluation team will mark individually and allocate individual scores. These scores will then be subject to moderation and the evaluation team will meet to agree a final score by consensus. The agreed final scores of the panel will then be weighted in accordance with the percentage weightings set out in Table 1.
- 4.10 **Where a Tenderer receives a score of 0, 1 and/or 2 on more than one scored question following the consensus review the submission will be considered a fail overall and excluded.**
- 4.11 All weightings, including sub-weightings are based on a percentage of the total score available in respect of each of the criteria. Once each score has been weighted in accordance with the percentage weightings set out in Table 1, the weighted score will be added together to identify the total score in respect of each criteria for that Tender.

## **Stage 6 – Commercial Evaluation**

4.12 Following completion of Stage 3, 4 and 5 (Quality, Supplier Charter and Social Value Evaluation), Tenders will be evaluated under Stage 6 (Commercial Evaluation) at 20% from the Price Proposal Template (Appendix 1).

4.13 Price will be scored based on the Tenderer that submits the lowest price achieving the maximum available score (expressed as a percentage) for the pricing element. Higher priced Tenders will receive a proportional score based on the amount higher they are than the lowest priced Tender, calculated as follows:

Tenderer A's score (Lowest Price) = Maximum available % (the Baseline)

Tenderer B's score (Higher Price) =  $\text{Lowest Price (A)} \div \text{Higher Price (B)} \times \text{Baseline (\%)}$

A worked example is set out below. In this example, the maximum weighting percentage for price is 30%, the lowest price (Tenderer A) is £10,000 and the higher price (Tenderer B) is £14,000:

$A = 10,000 = A\text{'s score is } 30\%$

$A = 10,000 \div B = 14,000 \times 30\% = B\text{'s score is } 21.4\%$

All scores will be rounded to 2 decimal places.

4.14 If any aspect of a price submission is deemed by The Crown Estate to be abnormally low, The Crown Estate may, at its discretion, reject that offer but only after seeking clarification in accordance with Regulation 69 of the Public Contract Regulations 2015.

## **Final decision and Approval**

4.15 Final weighted scores for all stages of the tender evaluation will be added together to produce a final ranking of Tenderers.

4.16 The Crown Estate reserves the right to clarify a Tenderer's Tender response at any point during the evaluation process and will do this by communicating with the Tenderer concerned via the Tender Portal.

4.17 The Tenderers acknowledge and agree that the requirements set out in the SQ continue to apply throughout the Procurement and, if successful, into the Contract duration. With that in mind, prior to contract award and prior to entering into the Contracts (and at any other reasonable time throughout the Procurement), The Crown Estate reserves the right to request any information from a Tenderer to ensure its continued compliance with the SQ criteria, including (but not limited to) evidence of the Tenderer's economic and financial standing.