



Bid Pack For Open Market Competition

This procurement event will be conducted in accordance with the Public Contract Regulations 2015, specifically Chapter 8, Below Threshold Procurements.

Attachment 2 – How To Bid Including Evaluation Criteria

Introduction to Financial Services Training for HM Treasury

Contract Reference: CCHR20A48

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1. How To Make Your Bid

- 1.1. Your bid must be made by the organisation that will be responsible for providing the deliverables if your bid is successful.
- 1.2. The requirement is not suitable for a lotted approach. The reason being, the requirement would benefit from a sole supplier having knowledge and management of all the deliverables.
- 1.3. Remember to:
 - 1.3.1. Decline this Bid Pack if you do not wish to submit a response. If you Decline please provide a reason for doing so
 - 1.3.2. Enter your bid into the e-Sourcing Suite. We can only accept bids that we receive through the e-Sourcing Suite
 - 1.3.3. Make sure you answer every question
 - 1.3.4. Each question must be answered in its own right. You must not answer any of the questions by cross referencing other questions or other materials e.g. reports located on your website.
 - 1.3.5. Submit your bid in good time and before the bid submission deadline.
 - 1.3.6. Upload **ONLY** those attachments we have asked for in line with the requirements specified – any other supporting evidence, certificates for example, will be requested separately by us.
 - 1.3.7. If we **do not** require attachments and have specified this please only use the Text Boxes provided for your answer.
 - 1.3.8. Check for messages in the e-Sourcing Suite throughout the competition.
 - 1.3.9. Press the **Submit Response** button when your bid is ready, otherwise we will not be able to see it.
 - 1.3.10. If you are unsure, ask questions before the Clarification Questions Deadline.

2. How The Questionnaires Are Structured:

- 2.1. A summary of all the questions in the evaluation, along with the marking scheme, and weightings for each question is set out below:
- 2.2. QUALIFICATION ENVELOPE
- Key Participation Requirements – Pass/Fail
 - Conflicts of Interest – Pass/Fail
 - Information Only
- 2.3. TECHNICAL ENVELOPE
- Question 4 – SUPPLIER CAPABILITY
 - Question 5 – QUALITY OF PROGRAMME CONTENT AND DESIGN APPROACH
 - Question 6 – SERVICE DELIVERY AND RELATIONSHIP MANAGEMENT
- 2.4. COMMERCIAL ENVELOPE
- Question 7 – PRICE

QUALIFICATION ENVELOPE

QUALIFICATION - KEY PARTICIPATION REQUIREMENTS

Response Guidance

The following questions are 'Pass/Fail' questions. If Potential Bidders are unwilling or unable to answer "Yes", their submission will be deemed non-compliant and shall be rejected. Potential Bidders should confirm their answer by selecting the appropriate option from the drop down menu.

Question Number	Question	Your Response
1.1	Do you accept the competition rules as described in Attachment 1 – About the Procurement?	Yes/No

1.2	Have you read, understood and accepted the Bid Pack and all associated attachments, specifically Attachment 3 - Statement of Requirements?	Yes/No
1.3	Do you agree, without caveats or limitations, that in the event that you are successful, Attachment 5 - Terms and Conditions will govern the provision of this contract?	Yes/No
1.4	Do you confirm your Organisation's e-Sourcing suite profile is complete and accurate at the time the bid closed and that any amendments made following acceptance of this event will be notified to the buyer in writing?	Yes/No
1.5	Please confirm that you understand that CCS reserve the right to use a credit reference agency to obtain a financial risk score for you and any members of your consortium or any nominated guarantor(s)?	Yes/No
1.6	Do you agree without caveat or limitations that you will provide upon request any relevant Insurance or Accreditation certificates?	Yes/No

QUALIFICATION - CONFLICTS OF INTEREST

Response Guidance

Question 2.1 is a 'Yes/No' question and will dictate whether or not question 2.2 needs to be answered.

Question 2.2 is a Pass / Fail question. Potential Bidders are required to provide details of how the identified conflict will be mitigated.

The Contracting Authority will review the mitigation in line with the perceived conflict of interest, to determine what level of risk this poses to them. Therefore, if Potential Bidders cannot or are unwilling to suitably demonstrate that they have suitable safeguards to mitigate any risk then their Bid will be deemed non-compliant and will be rejected.

Question Number	Question	Your Response
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2.1	Please confirm whether you have any potential, actual or perceived conflicts of interest that may be relevant to this requirement.	Yes/No
2.2	We require that any potential, actual or perceived conflicts of interest in respect of this Bid Pack are identified in writing and that companies outline what safeguards would be put in place to mitigate the risk of actual or perceived conflicts arising during the delivery of these services.	Text Box

QUALIFICATION - INFORMATION ONLY

Response Guidance

The following questions are for information only and do not form part of the evaluation. Information provided in response to these questions may be used in preparation of any Contract Award and any omissions may delay completion of this procurement.

Question Number	Question	Your Response
3.1	What are your details: <ul style="list-style-type: none"> • Name (registered name if registered) • Office address (registered address if registered) • Website address (if applicable) • Date of registration (if applicable) or date of formation • Registration number (company, partnership, charity etc.) if applicable • DUNS number (of head office, if applicable) • VAT number 	Text Box
3.2	What is your trading status: <ul style="list-style-type: none"> • Public limited company • Limited company • Limited liability partnership • Other partnership • Sole trader • Third sector 	Text Box

	<ul style="list-style-type: none"> • Other 	
3.3	Are you a Small, Medium or Micro Enterprise (SME)? See the definition of SME	Text Box
3.4	Please provide details of where the Award Outcome should be directed. Your response must include their; <ul style="list-style-type: none"> • Full Name • Role/Title • Registered Address • Email Address 	Text Box
3.5	Please provide details of any sub-contractors you propose to use in order to meet your obligations should you be awarded a Contract. Your response must include their; <ul style="list-style-type: none"> • Trading Name(s) • Registered Address(es) and contact details • Goods/Services to be provided 	Text Box

TECHNICAL ENVELOPE

Weighting 90%

TECHNICAL - SUPPLIER CAPABILITY

WEIGHTING 30%

Response Guidance

Potential Bidders MUST answer ALL the following questions. The method of response, page limit on attachments and evaluation criteria is set per question.

Unless otherwise specified, you must upload your response as attachments.

It is requested that attachments are submitted in Microsoft Word or Excel format and must be in Arial font size 11. Page limits include the use of headers footers and diagrams. Upload ONLY those attachments we have asked for – any other supporting evidence, certificates for example, will be requested separately by us

No costings should be included in responses to this Question.

Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
4.1	<p>Please demonstrate the relevant experience and capability that your organisation and individuals in your team have in undertaking assignments of a similar scale, scope and complexity.</p> <p>Your response must include, but not limited to:</p> <ul style="list-style-type: none"> • two case studies of how your organisation successfully delivered a similar relevant requirement in terms of scale, scope and complexity, in the last three years • details of the structure of the delivery team and how resources across your organisation will be used to meet the services within the Statement of Requirements • CVs for the account manager and trainers (to be identified as the Key Personnel for the purposes of the contract) who should be involved in the design and delivery of the programme. Please state clearly who will be responsible for designing, delivering, facilitating etc. And give details of their specific relevant experience and knowledge of the subject area(s). 	Attachment	50	100	100%

	(Brief client testimonials and feedback are encouraged as part of the case studies) CVs: no more than 2 sides of A4 per individual Page Limit: No more than 8 sides of A4 (including CVs)				
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TECHNICAL - QUALITY OF PROGRAMME CONTENT AND DESIGN APPROACH

WEIGHTING 30%

Response Guidance

Potential Bidders MUST answer ALL the following questions. The method of response, page limit on attachments and evaluation criteria is set per question.

Unless otherwise specified, response must be uploaded as attachments.

It is requested that attachments are submitted in Microsoft Word or Excel format and must be in Arial font size 11. Page limits include the use of headers footers and diagrams. Upload ONLY those attachments we have asked for – any other supporting evidence, certificates for example, will be requested separately by us

No costings should be included in responses to this Question.

Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
5.1	Please set out your proposed methodology for approaching the design requirements of the programme and specify how you plan to use interactive learning elements.	Attachment	50	100	70%

	<p>Your response must include, but not limited to:</p> <ul style="list-style-type: none"> • format of the training - as outlined at para 3.7 of the Statement of Requirements. Potential Bidders must provide supporting rationale on why their approach best meets the needs of the Customer and participants within their proposal • the evaluation principles and solutions you would employ to measure the impact of the programme on participants' learning • how your approach would be adopted to suit a virtual training environment. <p>Page Limit: No more than 5 sides of A4.</p>				
5.2	<p>Please provide 2 case studies and example materials from one similar programme to demonstrate the type of content you propose to set in your response to question in 5.1, that you have delivered in the past; or could offer in the future, including a 20-minute sample session.</p> <p>Page Limit: No more than 4 sides of A4.</p>	Attachment	50	100	30%

TECHNICAL – SERVICE DELIVERY AND RELATIONSHIP MANAGEMENT

WEIGHTING 30%

Response Guidance

Potential Bidders MUST answer ALL the following questions. The method of response, page limit on attachments and evaluation criteria is set per question.

Unless otherwise specified, response must be uploaded as attachments.

It is requested that attachments are submitted in Microsoft Word or Excel format and must be in Arial font size 11. Page limits include the use of headers footers and diagrams. Upload ONLY those attachments we have asked for – any other supporting evidence, certificates for example, will be requested separately by us.

No costings should be included in responses to this Question.

Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
6.1	<p>Please set out your proposal for management of the full programme from design to delivery and evaluation. Potential Bidders should take into account that this should be in close cooperation with the HM Treasury's Financial Services Group officials. This should detail the specific risks relevant to HM Treasury at each stage, and how they intend to mitigate them.</p> <p>Your response must include, but not limited to:</p> <ul style="list-style-type: none">• a comprehensive project plan• a Risk, Assumptions, Issues	Attachment	50	100	100%

	and Dependencies (RAID) log (to a maximum of 6 sides of A4) Page Limit: No more than 8 sides of A4				
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COMMERCIAL ENVELOPE

Weighting 10%

COMMERCIAL - PRICE					WEIGHTING 10%
Response Guidance Potential Bidders must enter costs by uploading the relevant Attachment 4 - Price Schedule at the question level on the e-Sourcing event. Prices should be submitted in pounds Sterling inclusive of any expenses but exclusive of VAT.					
Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
7.1	Please confirm, by selecting 'YES' that you have attached a completed Price Schedule to the response to this question. In so doing, you are also confirming that prices offered are inclusive of any expenses, exclusive of VAT and firm for the period following the Deadline for Submission as stated in the Attachment 1 – About the Procurement.	Yes/No	N/A	N/A	N/A
7.2	Please provide costings to deliver the activities as stated within Attachment 3 - Statement of Requirement.	Attachment	N/A	100	100%

	<p>A capped cost should be provided to deliver the services for both potential options – either face-to-face or virtually.</p> <p>Either option should not exceed the budget for this requirement, which is set at £44,000, including all extension options. Bids over this amount will be deemed non-compliant.</p>				
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3. Award Criteria

- 3.1. The award stage consists of a Qualification, Technical and Commercial evaluation.
- 3.2. The award of the resultant contract will be on the basis of the 'Most Economically Advantageous Tender' (MEAT).
- 3.3. **Award process - What you need to do**
 - 3.3.1. Answer the questions in section 2 above in the e-Sourcing suite.
 - 3.3.2. Complete the Attachment 4 – Price Schedule.
 - 3.3.3. You must upload your completed Price Schedule into the e-Sourcing suite in the Commercial Envelope.
- 3.4. **What we will do**

QUALIFICATION Envelope (Compliance Check)

First, we will complete a mandatory evaluation to make sure that you have answered all questions and have completed the Attachment 4 - Price Schedule in line with our instructions. All bids passing the mandatory evaluation will be progressed to the Technical Evaluation.

TECHNICAL Evaluation

We will give your responses to the TECHNICAL questions to the Contracting Authority's evaluation panel. Each evaluator will independently assess your

responses to the technical questions using the response guidance and the evaluation criteria.

They will give a score and a reason for their score for each question they are assessing. The evaluators will enter the scores and reasons into the e-Sourcing suite.

If the evaluation panel wishes to clarify any areas of your bid, bid clarification questions will be issued via the e-Sourcing suite on an individual basis.

Consensus

Once the evaluators have independently assessed your answers to the questions we will arrange for the evaluators to meet. We will facilitate the discussion.

At this meeting, the evaluators will discuss the technical responses and review their scores and reasons for that score. The discussion will continue until they reach a consensus regarding the score, and reason for that score, for each question.

These final scores will be used to calculate your technical score.

If the evaluation panel wishes to clarify any areas of your bid, bid clarification questions will be issued via the e-sourcing suite on an individual basis.

TECHNICAL Threshold

If you have not met the minimum acceptable score for each question, you will be excluded from the competition and you will not receive a Commercial score. We will tell you that you have been excluded from the procurement and why at award stage.

COMMERCIAL Evaluation

We will consider your commercial response and conduct compliance checks, review if we consider your bid to be abnormal and conduct any clarifications required to formally evaluate your submission. This will be conducted in tandem with the technical evaluations and completed by a commercial evaluation panel.

We will only calculate your commercial score using the scoring mechanism outlined within the Bid Pack. However, if you failed to meet the minimum acceptable score during the technical evaluation you will not receive a score for the Commercial Envelope. If we wish to clarify any areas of your bid, bid clarification questions will be issued via the e-Sourcing suite on an individual basis.

Final Score

Your technical score will be added to your commercial score, to create your final score.

Award

Award will be made to the successful bidder, subject to contract.

We will notify successful and unsuccessful bidder(s) providing feedback via the e-sourcing suite.

4. Marking Scheme

- 4.1. The evaluation criteria set out below will be used during the Technical Evaluation:

Mark	Comment
0	Failed to provide confidence that the proposal will meet the requirements. An unacceptable response with serious reservations.
25	A Poor response with reservations. The response lacks convincing detail with risk that the proposal will not be successful in meeting all the requirements.
50	Meets the requirements – the response generally meets the requirements, but lacks sufficient detail to warrant a higher mark.
75	A Good response that meets the requirements with good supporting evidence. Demonstrates good understanding.
100	An Excellent comprehensive response that meets the requirements. Indicates an excellent response with detailed supporting evidence and no weaknesses resulting in a high level of confidence.

5. Qualification Envelope Evaluation

- 5.1. Questions 1 and 2 are mandatory question(s) and will be evaluated PASS / FAIL. If you fail any of these questions, you will be excluded from the competition. We will tell you that your bid has been excluded.

6. Technical Envelope Evaluation

- 6.1. When the consensus meeting has taken place and the final score for each question has been agreed by the evaluators, your final score for each question will be multiplied by that question's weighting to calculate your weighted score for that question.
- 6.2. Each weighted score for each question will then be added together to calculate your technical score.
- 6.3. Please see table A below for an example of how your technical score will be calculated, please note that this table is for illustrative purposes only and does not necessarily reflect the questions and weightings being used to run this procurement.

Table A – EXAMPLE ONLY

				Bidder A			Bidder B			Bidder C		
Questionnaire	Questionnaire Weighting	Question	Question Weighting	Consensus Score (Max 100)	Weighted Question Score	Weighted Questionnaire Score	Consensus Score (Max 100)	Weighted Question Score	Weighted Questionnaire Score	Consensus Score (Max 100)	Weighted Question Score	Weighted Questionnaire Score
4. Service Delivery	40%	4.1	50%	100	50	35.00	75	37.5	30.00	75	37.5	25.00
		4.2	50%	75	37.5		75	37.5		50	25	
Questionnaire 4 Totals					87.5		75			62.5		
5. Account Management	30%	5.1	75%	50	37.5	18.75	75	56.25	20.63	50	37.5	15.00
		5.2	25%	100	25		50	12.5		50	12.5	
Questionnaire 5 Totals					62.5		68.75			50		
Quality Total Score						53.75			50.63			40.00

7. Commercial Envelope Evaluation

7.1. This section contains information on how to complete Attachment 4 - Price Schedule and the commercial evaluation process.

7.2. How to complete your Attachment 4 – Price Schedule

- 7.2.1. Read and understand the instructions in the Attachment 4 - Price Schedule, and in this section before submitting your prices.
- 7.2.2. Your prices should compare with the Technical submission.
- 7.2.3. Your prices must be sustainable and inclusive of all costs for example your operating costs and profit.
- 7.2.4. Your prices are to exclude VAT.
- 7.2.5. Pricing is to be inclusive of expenses.
- 7.2.6. The currency is British pounds sterling, up to two decimal places.
- 7.2.7. Pricing will be based on:
 - Eight (8) hour Working Day; and
 - Rounded to the nearest £10.
 - Zero bids will not be allowed.
- 7.2.8. We will investigate where we consider your bid to be abnormal.
- 7.2.9. The prices submitted shall not exceed any existing commercial agreement rates.
- 7.2.10. You must download and complete the Attachment 4 – Price Schedule you are submitting a bid for. Further detail may be provided within the Attachment 4 – Price Schedule.
- 7.2.11. When you have completed your Attachment 4 - Price Schedule, you must upload this into the e-Sourcing Suite at the Commercial Envelope. If you do not upload your Attachment 4 – Price Schedule your bid may be rejected from this competition.

- 7.2.12. Do not alter, amend or change the format or layout of the Attachment 4 – Price Schedule.

7.3. Commercial Evaluation Process

- 7.3.1. Commercial scores shall be calculated using pricing submitted as part of a compliant bid only and using the following process:
- 7.3.2. We will check you have completed the Attachment 4 – Price Schedule as instructed.
- 7.3.3. Failure to complete the Attachment 4 - Price Schedule as instructed may result in your bid being deemed non-compliant and it may be rejected from this competition.
- 7.3.4. The commercial evaluation will be undertaken separately to the technical evaluation process.
- 7.3.5. The commercial evaluation will be undertaken against each pricing tab/question detailed within Attachment 4 – Price Schedule
- 7.3.6. The Bidder with the lowest price for each question will be awarded the maximum score available for that question.
- 7.3.7. All other Bidders will get a score relative to the lowest total price for that question, calculated using the formula below.
- 7.3.8. The calculation we will use to evaluate your total price per element, is as follows:

$$\text{Commercial Score} = \frac{\text{Lowest total price}}{\text{Potential Bidder's total price}} * \text{maximum score available}$$

- 7.3.9. Once all question scores have been calculated, they will be added together and multiplied by the Commercial Envelope weighting to identify your Total Commercial Weighted Score.
- 7.3.10. Please see table B below for an example of how your Commercial score will be calculated, please note that this table is for illustrative purposes only and does not necessarily reflect the questions and weightings being used to run this procurement.

Table B – EXAMPLE ONLY

Technical Envelope	Envelope Weighting	Question	Question Weighting	Bidder A				Bidder B				Bidder C			
				Bid Submitted	Lowest Bid Submitted	Score	Weighted Question Score	Bid Submitted	Lowest Bid Submitted	Score	Weighted Question Score	Bid Submitted	Lowest Bid Submitted	Score	Weighted Question Score
7. Costs	100%	7.1	100%	£217,000	£217,000	100	100	£432,000	£217,000	50.23	50.23	£542,000	£217,000	40.04	40.04
Commercial Envelope Total							100				50.23				40.04
Commercial Envelope Weighted Total@40%	40%						40				20.09				16.01

7.3.11. Where we consider any of the total price(s) you have submitted to be abnormal, we will ask you to explain the price(s) you have submitted (as required in regulation 69 of the Public Contract Regulations 2015).

8. Final Decision to Award

- 8.1. We will add your technical score to your commercial score to calculate your final score.
- 8.2. Where the final score achieved by multiple Bidders ranks them in equal position and all such Bidders have achieved the Minimum Pass Mark or higher in all questions, the Bidder with the highest score for question 5.1, followed by question 5.2, will be deemed the winner and awarded the Contract.
- 8.3. Please see table C below for an example of how your technical score and commercial score will be added together to identify your final score. Please note that this table is for illustrative purposes only and does not necessarily reflect the questions and weightings being used to run this procurement.

Table C – EXAMPLE ONLY:

		Bidder A	Bidder B	Bidder C
Envelope	Envelope Weighting	Total Weighted Score	Total Weighted Score	Total Weighted Score
Technical	60%	48.78	33.41	52.25
Commercial	40%	40.00	20.09	16.01
Total Bid Score	100%	88.78	53.50	68.26
Rank		1	3	2

The bidder with the highest final score, where the bid is deemed compliant, will be awarded the contract, where approved by the Contracting Authority.

9. Further Information

- 9.1. All communications will be conducted via the e-Sourcing Suite, including notification of outcome.