**Section 3: Framework Evaluation Criteria**

All LOTs in this tender will be evaluated in line with the following 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**

3.1 The scored Quality criteria will account for 75% 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.

3.2 Any character limits, referred to on the Tender Portal for a question are the **maximum** number of characters 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.

**Supplier Charter Evaluation**

3.3 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.

**Social Value Evaluation**

3.4 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.

**Commercial Evaluation**

3.5 The Commercial Section includes acceptance to our Consultancy Framework Agreement as attached. The Commercial Section will account for 5% of the total score.

**Framework Agreement**

3.6 The Form of the Framework Agreement (and Call Off Contract) is available on the Tender Portal at Appendix C. The Open Procedure does not allow for the Framework Agreement (and Call Off Contract) to be negotiated after the decision to award has been made, or during the evaluation process. As such, Tenderers are not invited to mark-up the Framework Agreement or Call Off Contract as part of this tender exercise. Tenderers should ensure that they have read and understood the terms of the Framework Agreement and Call Off Contract prior to submitting their Tenders and receive sign-off as necessary from their board/executive members, legal advisers and insurers.

3.7 Tenderers are required to obtain sign-off on the Framework Agreement and Call Off Contract from their legal advisers and insurers and confirm within their proposals that they are able to enter into contract with The Crown Estate on the form of contract, without amendment. The Crown Estate will not enter into negotiation with a Tenderer either during or after the award decision.

3.8 By confirming acceptance of the Form of Tender, Tenderers are indicating their unequivocal acceptance of the contractual documentation in the forms attached to this ITT. The Crown Estate reserves the right to reject any Tender where the Tenderer subsequently seeks any amendments, either pre- or post-award.

**Section 4: Evaluation methodology**

Evaluation Methodology

4.1 The Crown Estate will conduct an evaluation of the Tenders received. The Framework Agreement will be awarded to those Tenderers who achieve a Quality, Supplier Charter, Social Value combined score of greater than 50% 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 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 as noted in paragraph 4.4 below.

4.2 For confirmation all questions in all sections apply as per the identified weightings to all identified LOTs.

The Evaluation Team

4.3 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 and The Crown Estate's technical and legal advisers where required.

General information on the evaluation process

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

Stage 1 – Initial Screening Assessment (Completion and return of Tender Document Checklist on the Tender Portal);

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 – Supplier Charter Evaluation (Evaluation of completed Supplier Charter on [the](http://www.sourcedogg.com) Tender Portal);

Stage 5 – Social Value Evaluation (Evaluation of completed Social Value on the Tender Portal); and

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

Stage 1 – Initial Screening Assessment

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

**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 5 – Quality, Supplier Charter and Social Value Evaluations

4.7 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. Each LOT has the equivalent weighting as identified per each section:

|  |  |  |
| --- | --- | --- |
| **STAGE** | **SECTION** | **PERCENTAGE %** |
| 3 | Quality | 75 |
| 4 | Supplier Charter | 10 |
| 5 | Social Value | 10 |
| 6 | Commercial | 5 |

**Table 1 – Question Detail and Weighting – for clarification the Question weighting is identified as the percentage of the overall section weighting identified.**

**Each LOT will have the 100% weighting applied and identified below and in line with the instructions here.**

**Supplier Charter and Social Value questions are applicable to every included LOT ie no specific LOT questions.**

|  |  |  |
| --- | --- | --- |
| **Question number** | **Quality Question LOT 1 25%** | **Question Weighting** |
| **3.1** | **Account and Contract Management** | **30** |
| **3.2** | **Account and Contract Management** | **10** |
| **3.3** | **Account and Contract Management** | **10** |
| **3.4** | **Account and Contract Management** | **50** |
| **Question Number** | **Quality Question LOT 1 20%** | **Question Weighting** |
| **4.1** | **Mobilisation** | **80** |
| **4.2** | **Mobilisation** | **20** |
| **Question Number** | **Quality Question LOT 1 20%** | **Question Weighting** |
| **5.1** | **Statement of Service** | **10** |
| **5.2** | **Statement of Service** | **25** |
| **5.3** | **Statement of Service** | **25** |
| **5.4** | **Statement of Service** | **40** |
| **Question Number** | **Quality Question LOT 1 10%** | **Question Weighting** |
| **6.1** | **Innovation** | **70** |
| **6.2** | **Innovation** | **10** |
| **6.3** | **Innovation** | **10** |
| **6.5** | **Innovation** | **10** |
|  | **Total Available** | **75%** |
| **Question Number** | **Quality Question LOT 2 25%** | **Question Weighting** |
| **7.1** | **Account and Contract Management** | **30** |
| **7.2** | **Account and Contract Management** | **10** |
| **7.3** | **Account and Contract Management** | **10** |
| **7.4** | **Account and Contract Management** | **50** |
| **Question Number** | **Quality Question LOT 2 20%** | **Question Weighting**  |
| **8.1** | **Mobilisation** | **80** |
| **8.2** | **Mobilisation** | **20** |
| **Question Number** | **Quality Question LOT 2 20%** | **Question Weighting** |
| **9.1** | **Statement of Service** | **20** |
| **9.2** | **Statement of Service** | **40** |
| **9.3** | **Statement of Service** | **40** |
| **Question Number** | **Quality Question LOT 2 10%** | **Question Weighting** |
| **10.1** | **Innovation** | **70** |
| **10.2** | **Innovation** | **10** |
| **10.3** | **Innovation** | **10** |
| **10.5** | **Innovation** | **10** |
|  | **Total Available**  | **75%** |
| **Question Number** | **Quality Question LOT 3 25%** |  |
| **11.1** | **Account and Contract Management** | **30** |
| **11.2** | **Account and Contract Management** | **10** |
| **11.3** | **Account and Contract Management** | **10** |
| **11.4** | **Account and Contract Management** | **50** |
| **Question Number** | **Quality Question LOT 3 20%** | **Question Weighting** |
| **12.1** | **Mobilisation** | **80** |
| **12.2** | **Mobilisation** | **20** |
| **Question Number** | **Quality Question LOT 3 20%** | **Question Weighting** |
| **13.1** | **Statement of Service** | **20** |
| **13.2** | **Statement of Service** | **40** |
| **13.3** | **Statement of Service** | **40** |
| **Question Number** | **Quality Question LOT 3 10%** | **Question Weighting** |
| **14.1** | **Innovation** | **70** |
| **14.2** | **Innovation** | **10** |
| **14.3** | **Innovation** | **10** |
| **14.5** | **Innovation** | **10** |
|  | **Total Available** | **75%** |
| **Question Number** | **Quality Question LOT 4 25%** | **Question Weighting** |
| **15.1** | **Account and Contract Management** | **30** |
| **15.2** | **Account and Contract Management** | **10** |
| **15.3** | **Account and Contract Management** | **10** |
| **15.4** | **Account and Contract Management** | **50** |
| **Question Number**  | **Quality Question LOT 4 20%** | **Quality Weightings** |
| **16.1** | **Mobilisation** | **80** |
| **16.2** | **Mobilisation** | **20** |
| **Question Number** | **Quality Question LOT 4 20%** | **Quality Weightings** |
| **17.1** | **Statement of Service** | **20** |
| **17.2** | **Statement of Service** | **40** |
| **17.3** | **Statement of Service** | **40** |
| **Question Number** | **Quality Question LOT 4 10%** | **Quality Weightings** |
| **18.1** | **Innovation** | **70** |
| **18.2** | **Innovation** | **10** |
| **18.3** | **Innovation** | **10** |
| **18.5** | **Innovation** | **10** |
|  | **Total Available** | **75%** |
| **Question Number** | **Quality Question LOT 5 25%** | **Quality Weightings** |
| **19.1** | **Account and Contract Management** | **30** |
| **19.2** | **Account and Contract Management** | **10** |
| **19.3** | **Account and Contract Management** | **10** |
| **19.4** | **Account and Contract Management** | **50** |
| **Question Number** | **Quality Question LOT 5 20%** | **Quality Weightings** |
| **20.1** | **Mobilisation** | **80** |
| **20.2** | **Mobilisation** | **20** |
| **Question Number** | **Quality Question LOT 5 20%** | **Quality Weighting** |
| **21.1** | **Statement of Service** | **20** |
| **21.2** | **Statement of Service** | **40** |
| **21.3** | **Statement of Service** | **40** |
| **Question Number** | **Quality Question LOT 5 10%** | **Quality Weighting** |
| **22.1** | **Innovation** | **70** |
| **22.2** | **Innovation** | **10** |
| **22.3** | **Innovation** | **10** |
| **22.4** | **Innovation** | **10** |
|  | **Total Available**  | **75%** |
| **Question Number** | **Quality Question LOT 6 30%** | **Quality Weightings** |
| **19.1** | **Account and Contract Management** | **30** |
| **19.2** | **Account and Contract Management** | **10** |
| **19.3** | **Account and Contract Management** | **10** |
| **19.4** | **Account and Contract Management** | **50** |
| **Question Number** | **Quality Question LOT 6 10%** | **Quality Weightings** |
| **20.1** | **Mobilisation** | **100** |
| **Question Number** | **Quality Question LOT 6 25%** | **Quality Weighting** |
| **21.1** | **Statement of Service** | **20** |
| **21.2** | **Statement of Service** | **40** |
| **21.3** | **Statement of Service** | **40** |
| **Question Number** | **Quality Question LOT 6 10%** | **Quality Weighting** |
| **22.1** | **Innovation** | **70** |
| **22.2** | **Innovation** | **10** |
| **22.3** | **Innovation** | **10** |
| **22.4** | **Innovation** | **10** |
|  | **Total Available**  | **75%** |
| **Question Number** | **Supplier Charter Question 3%** | **Question Weighting** |
| **26.1** | **Sustainability** | **50** |
| **26.3** | **Sustainability** | **50** |
| **Question Number** | **Supplier Charter Question 2%** | **Question Weighting** |
| **27.1** | **DE&I** | **20** |
| **27.2** | **DE&I** | **10** |
| **27.3** | **DE&I** | **40** |
| **27.4** | **DE&I** | **30** |
| **Question Number** | **Supplier Charter 3%** | **Question Weighting** |
| **28.3** | **Information Security & Data Residency** | **50** |
| **28.4** | **Information Security & Data Residency** | **50** |
| **Question Number** | **Supplier Charter 2%** | **Question Weighting** |
| **29.1** | **Data Protection and GDPR** | **100** |
|  | **Total Available** | **10** |
| **Question number** | **Social Value Question 10%** | **Question Weighting** |
| **30.1** | **Social Value** | **50** |
| **30.2** | **Social Value** | **50** |
|  | **Total available** | **10 %** |

**Table**

 **2 – Scoring Criteria**

|  |  |
| --- | --- |
| **Scoring 0-5** | **Scoring Criteria** |
| 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 Framework. |
| 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 Framework. |
| 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 Framework. |

4.8 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.

4.9 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.

4.10 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

4.11 The pricing submitted will be considered to be ceiling prices that will be attached to the Agreement when finalised the submissions will be evaluated in line with the scoring scale outlined in Table 2. The Crown Estate reserves the right to clarify the pricing submitted to ensure it is aligned with the Quality submission.

**Final decision and Approval**

4.12 Final weighted scores for all stages of the tender evaluation will be added together to produce a final ranking of Tenderers. As noted in 4.1 above.

4.13 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.

4.14 The Tenderers acknowledge and agree that the requirements set out in the SQ continue to apply throughout the Procurement and, if successful, into the Framework Agreement duration. With that in mind, prior to contract award and prior to entering into the Framework Agreement (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.