

## APPENDIX B RESPONSE GUIDANCE

### 1 INTRODUCTION

- 1.1 This document provides the questions that will be evaluated as part of this procurement and an overview of the methodology which will be adopted by the Authority and its Agent to evaluate Potential Provider responses to each question. It also sets out the marking scheme which will apply.
- 1.2 The following information has been provided in relation to each question (where applicable);
- 1.2.1 Weighting – highlights the relative importance of the question
- 1.2.2 Guidance – sets out information for the Potential Providers to consider
- 1.2.3 Marking Scheme – details the marks available to evaluators during evaluation
- 1.3 The defined terms used in the ITT document shall apply to this document.

### 2 DOCUMENT COMPLETION

- 2.1 You must not submit any additional information with your Tender other than that specifically requested in this document or Appendix A – Service Description and Appendix B – Response Guidance.
- 2.2 **Note:** Please submit your tender response as attachments there should be only three attachments, as follows: -
- Responses to all **Commercial (1, 2, & 3)** questions must be submitted as a **single** PDF document, to be attached at the quality evaluation response in the AWARD e-Portal;
  - Responses to **Quality (4, 5 & 6)** questions must be submitted as a **single** PDF document, to be attached at the quality evaluation response in the AWARD e-Portal;
  - Responses to **Price (7)** questions must only be submitted as a **single** PDF, to be attached at the **price schedule response** in the AWARD e-Portal.

Any submitted tender responses which are not separated in the above manner may be rejected.

Any Tender response left at “Draft Bid” status on the AWARD e-portal at the Tender receipt cut off time may be deemed a non-compliant bid and may NOT be assessed further.

### 3 RESPONSE GUIDANCE

#### 3.1 Quality Evaluation Process

3.1.1 Each response to questions within the Quality/Service Delivery Questionnaire(s) will be given once of the scores in accordance with the table below:

| 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. |

3.1.2 Each mark achieved will be multiplied by the corresponding weighting to provide an overall question score.

3.1.3 When the score for each question has been determined they will be added together to provide an overall score for the Quality Evaluation (“Quality Score”).

#### 3.2 Consensus Marking Procedure

3.2.1 The Consensus Marking Procedure is a two-step process, comprising of:

- 3.2.1.1 Independent evaluation; and
- 3.2.1.2 Group consensus marking.

3.2.2 During the independent evaluation process, each evaluator will separately (i.e. without conferring with other evaluators) scrutinise the quality of answers given by Potential Providers in their Tender. Each evaluator will then allocate a mark for the answer in accordance with the Marking Scheme applicable to that question.

3.2.3 During the meeting, the evaluators will discuss the independent marks until they reach a consensus regarding the marks that should be attributed to each Potential Providers’ answer to the questions.

3.2.4 Once all quality responses have been evaluated the individual scores attributed to each response will be added together to provide a ‘Quality Score’.

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### 3.3 Price Evaluation Process

3.3.1 Potential Providers' are required to provide a completed pricing schedule against the 'Price' Questionnaire submitted to the AWARD e-portal.

3.3.2 The Potential Provider with the lowest price shall be awarded the Maximum Score Available. The remaining Potential Providers shall be awarded a percentage of the Maximum Score Available equal to their price, relative to the lowest price submitted.

3.3.3 The calculation used is the following:

3.3.4 =  $\frac{\text{Lowest Price Tendered}}{\text{Tender price}} \times \text{Maximum Score Available}$

| Potential Provider   | Price Submitted | Score Calculation                  | Maximum Score Available | Score Awarded |
|----------------------|-----------------|------------------------------------|-------------------------|---------------|
| Potential Provider A | £1,000          | $\frac{£1,000}{£1,000} \times 100$ | 100                     | 100           |
| Potential Provider B | £2,000          | $\frac{£1,000}{£2,000} \times 100$ | 100                     | 50            |
| Potential Provider C | £2,500          | $\frac{£1,000}{£2,500} \times 100$ | 100                     | 40            |

### 3.4 Final score

3.4.1 The Quality Score will be added to the Price Score to determine the final score for each Potential Provider ("Final Score")

## 4 EVALUATION CRITERIA

- 4.1 Questionnaires 1 and 2 contain 'Pass/Fail' questions and act as a doorway for progression to the following stages of the evaluation. Potential Providers are strongly advised to read and understand the specific guidance provided before responding to these questionnaires.
- 4.2 Questionnaire 3 is for information only. Although this questionnaire does not form part of the evaluation process, Potential Providers are advised to complete it in full as any omissions could affect the award process.
- 4.3 The Authority and its Agent reserve the right to challenge any information provided in response to Questionnaire 3 and request further information in support of any statements made therein.

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#### QUESTIONNAIRE 1 – KEY PARTICIPATION REQUIREMENTS

|                        |                                                                                                                                                                                                                                                                                                      |                  |                      |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|----------------------|
| <b>GUIDANCE</b>        | The following questions are ‘Pass/Fail’ questions. If Potential Providers are unwilling or unable to answer “Yes”, their submission will be deemed non-compliant and shall be rejected. Potential Providers should confirm their answer by selecting the appropriate option from the drop down menu. |                  |                      |
| <b>Question Number</b> | <b>Question</b>                                                                                                                                                                                                                                                                                      | <b>Max Score</b> | <b>Weighting (%)</b> |
| <b>[1.1]</b>           | Have you read, understood and accepted the Invitation to Tender and all associated appendices, specifically Appendix A, Statement of Requirements?                                                                                                                                                   | Pass/Fail        | N/A                  |
| <b>[1.2]</b>           | Do you agree, without caveats or limitations, that in the event that you are successful the Department for Transport Terms and Conditions will govern this contract?                                                                                                                                 | Pass/Fail        | N/A                  |

#### QUESTIONNAIRE 2 – CONFLICTS OF INTEREST

|                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                  |                      |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|----------------------|
| <b>GUIDANCE</b>        | Question 2.1 is a ‘Yes/No’ question and will dictate whether or not question 2.2 needs to be answered.<br><br>Question 2.2 is a Pass / Fail question. Potential Providers 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 Providers cannot or are unwilling to suitably demonstrate that they have suitable safeguards to mitigate any risk then their Tender will be deemed non-compliant and will be rejected. |                  |                      |
| <b>Question Number</b> | <b>Question</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <b>Max Score</b> | <b>Weighting (%)</b> |
| <b>[2.1]</b>           | Please confirm whether you have any potential, actual or perceived conflicts of interest that may be relevant to this requirement.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | None             | N/A                  |
| <b>[2.2]</b>           | We require that any potential, actual or perceived conflicts of interest in respect of this ITT 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.                                                                                                                                                                                                                                                                                                                                     | Pass/Fail        | N/A                  |

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| QUESTIONNAIRE 3 – INFORMATION ONLY |                                                                                                                                                                                                                                                                                                                                                                                                                                                            |           |               |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------------|
| 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 Tender exercise.                                                                                                                                                                                              |           |               |
| Question Number                    | Question                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Max Score | Weighting (%) |
| [3.1]                              | <p>What are your details:</p> <ul style="list-style-type: none"><li>• Name (registered name if registered)</li><li>• Office address (registered address if registered)</li><li>• Website address (if applicable)</li><li>• Date of registration (if applicable) or date of formation</li><li>• Registration number (company, partnership, charity etc.) if applicable</li><li>• DUNS number (of head office, if applicable)</li><li>• VAT number</li></ul> | None      | N/A           |
| [3.2]                              | <p>What is your trading status:</p> <ul style="list-style-type: none"><li>• Public limited company</li><li>• Limited company</li><li>• Limited liability partnership</li><li>• Other partnership</li><li>• Sole trader</li><li>• Third sector</li></ul> <p>Other</p>                                                                                                                                                                                       | None      | N/A           |
| [3.3]                              | Please confirm whether your organisation is an SME as defined within <a href="#">EU recommendation 2003/361</a>                                                                                                                                                                                                                                                                                                                                            | None      | N/A           |
| [3.4]                              | <p>Please provide details of where the Award Outcome should be directed. Your response must include their;</p> <ul style="list-style-type: none"><li>• Full Name</li><li>• Role/Title</li><li>• Registered Address</li><li>• Email Address</li></ul>                                                                                                                                                                                                       | None      | N/A           |

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|              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |      |     |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-----|
| <b>[3.5]</b> | 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"><li>• Trading Name(s)</li><li>• Registered Address(es) and contact details</li><li>• Goods/Services to be provided</li></ul> NB - the Contracting Authority will approve/reject suggested subcontractors and may require further information prior to making a decision | None | N/A |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------|-----|

- 4.4 The following Quality/Service Delivery Questionnaires are designed to test Potential Providers' ability to deliver the requirement as set out in Appendix A, Statement of Requirements. Potential Providers *MUST* answer all Quality/Service Delivery questions.
- 4.5 Potential Providers must achieve **the minimum acceptable Quality Score overall of at least 60%**. Only those responses which achieve this threshold will move onto the Price Evaluation Process. The bids that do not make this threshold are rejected and therefore unsuccessful.
- 4.6 Potential providers will be marked in accordance with the marking scheme at Section 3.

| QUESTIONNAIRE 4 – QUALITY OF RESOURCES |                                                                                                                                 |                         | Weighting – 35% |
|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------|-------------------------|-----------------|
| Question Number                        | Question                                                                                                                        | Maximum Available Score | Weighting 35%   |
| <b>4.1</b>                             | Please provide evidence of the relevant previous experience of the proposed personnel who would be delivering this requirement. | 100                     | 15%             |
| <b>4.2</b>                             | Please provide evidence to demonstrate the suitability, capability and expertise of the proposed personnel.                     | 100                     | 15%             |
| <b>4.3</b>                             | Please provide your proposal for ensuring the appropriate allocation of resource for this contract.                             | 100                     | 5%              |

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| QUESTIONNAIRE 5 – QUALITY OF APPROACH |                                                                                                                             |                         | Weighting – 35 % |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|-------------------------|------------------|
| Question Number                       | Question                                                                                                                    | Maximum Available Score | Weighting 35%    |
| 5.1                                   | Please provide evidence of your understanding of the objectives, deliverables and what the Department is trying to achieve. | 100                     | 10%              |
| 5.2                                   | Please provide a robust proposal and methodology for how the requirements of this contract will be achieved.                | 100                     | 25%              |

| QUESTIONNAIRE 6 – QUALITY SYSTEMS |                                                                                                            |                         | Weighting – 10 % |
|-----------------------------------|------------------------------------------------------------------------------------------------------------|-------------------------|------------------|
| Question Number                   | Question                                                                                                   | Maximum Available Score | Weighting 10%    |
| 6.1                               | Please provide information on any in-house Quality Control procedures that exist within your organisation. | 100                     | 5%               |
| 6.2                               | Please provide your plans to identify and manage risks throughout this contract.                           | 100                     | 5%               |

| QUESTIONNAIRE 7 – PRICE |                                                                                                                                                                                                                                                                                                           |           | Weighting – 20 % |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------|
| <b>GUIDANCE</b>         | <p>Potential Providers must upload the price schedule at the question level on the AWARD e-portal.</p> <p>Prices should be submitted in Pounds Sterling inclusive of any expenses but exclusive of VAT.</p> <p>Potential Providers will be marked in accordance with the marking scheme at Section 3.</p> |           |                  |
| Question Number         | Question                                                                                                                                                                                                                                                                                                  | Max Score |                  |
| [7.1]                   | Please confirm, by selecting 'YES' that you have attached a completed Price Schedule to the response to                                                                                                                                                                                                   | 100       |                  |

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|  |                                                                                                                                                                                                   |  |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
|  | this question. In so doing, you are also confirming that prices offered are inclusive of any expenses, exclusive of VAT and firm for a period of [90] days following the Deadline for Submission. |  |
|--|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|