



Crown  
Commercial  
Service

# Invitation to tender

## Attachment 2 – How to bid

### RM6146 Leasing Advisory Services

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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 goods and/or services if your bid is successful.
- 1.2 Your bid must be entered into the eSourcing tool. We can only accept bids that we receive through the eSourcing tool.
- 1.3 Upload ONLY those attachments we have asked for. Do not upload any attachments we haven't asked for.
- 1.4 Make sure you answer every question.
- 1.5 You must submit your bid before the bid submission deadline, in paragraph 5 "Timelines for the competition" in attachment 1 - About the framework.
- 1.6 It will be our decision whether we will accept bids submitted after the bid submission deadline.
- 1.7 You must regularly check for messages in the eSourcing tool throughout the competition. You must log on to the eSourcing tool and access your message inbox for this competition to check for messages.
- 1.8 If anything is unclear, or you are unsure how to complete your bid submission, you can raise a question before the clarification question deadline, via the eSourcing tool. Read paragraph 6 "When and how to ask questions" in attachment 1 - About the framework.
- 1.9 We may require you to clarify aspects of your bid in writing and/or provide additional information. Failure to respond within the time required, or to provide an adequate response will result in the rejection of your bid and your exclusion from this competition.

## **2. Selection stage**

- 2.1 At the selection stage, we evaluate bidders' technical, professional and financial capabilities. We will ask a range of questions appropriate to the procurement. It is important that you answer these questions accurately.
- 2.2 If you are relying on any key subcontractors to provide the answers to the technical and professional ability or you are relying on a guarantor to pass the economic and financial assessment, they must complete Parts 2 and 2A, Part 3, Part 4 of 'Attachment 4 Information and declaration workbook' for themselves.
- 2.3 In addition, if you are the lead member of a consortium, you must get each of the other members to complete Parts 2 and 2A, Part 3, Part 4 of 'Attachment 4 Information and declaration workbook' for themselves.
- 2.4 We are providing the 'Attachment 4 Information and declaration workbook' (attachment 4) to enable you to collect and submit this data to us, whether from organisations on whom you are relying (for example a key subcontractor or a guarantor) or from other members of a consortium.

## **3. Selection process**

- 3.1 After the bid submission deadline we will check all bids to make sure we have received everything we have asked for.
- 3.2 We may ask you to clarify information you provide, if that is necessary. Don't forget to check for messages in the eSourcing tool throughout the competition. You must log on to the eSourcing tool and access your message inbox for this competition to check for messages.
- 3.3 If your bid is not compliant we will reject your bid and you will be excluded from the competition. We will tell you why your bid is not compliant.
- 3.4 Not all selection questions need guidance as the questions are self-evident. However other questions such as the financial question, require a process to be undertaken before we can assess your response. In those instances we have told you what we will do in the evaluation guidance.

## **4. Selection criteria**

- 4.1 We may exclude you from the competition at the selection stage if:
  - you receive a 'fail' for any of the evaluated selection questions.
  - any of the information you have provided proves to be false or misleading.
  - you have broken any of the competition rules in Section 9 of attachment 1 About the framework, or not followed the instructions given in this ITT pack.
- 4.2 If we exclude you from the competition we will tell you and explain why.

## 5. Selection questionnaire

Please refer to Attachment 2a Selection questionnaire. Remember you must complete the questionnaire online in the eSourcing tool (qualification envelope).

Contract examples will be evaluated as follows:

**Evaluation** - We will give your examples to our evaluation panel. Each evaluator will independently assess each example using the response guidance for each contract example, the marking scheme and the evaluation guidance. They will give a mark (PASS/FAIL) and a reason for their mark for each example they are assessing. The evaluators will enter the marks and reasons into the eSourcing tool.

The marking scheme and evaluation criteria below will be used for all contract examples.

### Marking Scheme -- Evaluation Criteria

**Pass** - You have provided a contract example which meet all elements of the response guidance associated with each question.

**Fail** - You have not provided a contract example which meet all elements of the response guidance associated with each question.

OR

You have not provided any contract example details or the requested information.

**Consensus** - Once the evaluators have independently assessed each of your examples we will arrange for the evaluators to meet. We will facilitate the discussion. At this meeting, the evaluators will discuss the quality of your answers and review their marks and reasons for that mark. The discussion will continue until they reach a consensus regarding the mark and reason for that mark.

You must Pass all Contract examples submitted; your bid will be excluded from the competition if you fail any of the Contract examples submitted. We will tell you that your bid has been excluded from the competition and why. Should you fail to provide a Contract example we have asked for your bid will be excluded from this procurement.

## 6. Award stage

If you have successfully passed the selection stage, you will proceed to the award stage.

We have tried to make our award stage as simple as possible, whilst achieving the best possible commercial outcomes.

Your bid must deliver what our buyers need, at the best possible price you can give.

When completing your bid you must:

- Read through the entire ITT pack specifically Framework Schedule 1 (Specification) carefully, and read more than once

- Read each question, the response guidance, marking scheme and evaluation criteria
- Read the contract terms.
- If you are unsure, ask questions before the clarification questions deadline See paragraph 5 'Timelines for the competition' and paragraph 6 'When and how to ask questions' in Attachment 1 - About the framework document
- Allow plenty of time to complete your responses; it always takes longer than you think to submit
- Your prices should be in line with the service level you offer, in response to the award quality questions.

## **7. Award criteria**

The Award Stage consists of a quality evaluation (see paragraph 9 of this document) and a price evaluation (see paragraph 10 of this document).

The award of this framework will be on the basis of the 'Most Economically Advantageous Tender' (MEAT).

The weighting for the quality evaluation is 70 marks; and the price evaluation is worth 30 marks.

## **8. Award process**

### **8.1 What YOU need to do**

- answer the quality questions section A to H of the quality questionnaire in the eSourcing tool in the technical envelope.
- Complete the price matrix Attachment 3a.
- Upload your completed price matrix into the eSourcing tool in the commercial envelope to question PQ1.

## 8.2 What WE will do at the award stage

|    |   |
|----|---|
| 1. | <p><b>Compliance Check</b></p> <p>First, we will do a check to make sure that you completed the pricing matrix in line with our instructions.</p>   |
| 2. | <p><b>Quality Evaluation</b></p> <p>We will give your responses to our evaluation panel. Each evaluator will independently assess your responses to the quality questions using the response guidance and the evaluation criteria. Each evaluator will give a mark and a reason for their mark for each question they are assessing. Each evaluator will enter their marks and reasons into the eSourcing tool.</p>   |
| 3. | <p><b>Consensus</b></p> <p>Once the evaluators have independently assessed your answers to the questions we will arrange for the evaluators to meet and we will facilitate the discussion. At this consensus meeting, the evaluators will discuss the quality of your answers and discuss their marks and reasons for that mark. The discussion will continue until they reach a consensus regarding the mark, and a reason for that mark, for each question. These final marks will be used to calculate your quality score.</p> |
| 4. | <p><b>Quality Threshold</b></p> <p>If you have received a zero for any of the quality questions we will reject your bid and you will be excluded from the competition.</p> <p>We will tell you that your bid has been excluded from the competition and why.</p>  |
| 5. | <p><b>Evaluate Pricing</b></p> <p>We will then give your pricing to the price evaluation panel, who are different evaluators from those who assessed your quality responses.</p> <p>They will calculate your price score using the evaluation criteria in paragraph 11 – Price Evaluation.</p>  |
| 6. | <p><b>Final Score</b></p> <p>Your quality score will be added to your price score, to create your final score as illustrated in paragraph 12 - Final decision to award.</p> <p>The final score threshold you need to achieve is fifty one (51) in order to be successful. If your final score is below 51 then your bid will be excluded and you will not be awarded a framework contract.</p>  |

|    |   |
|----|---|
| 7. | <b>Award</b><br>Awards will be made to the successful bidders following the standstill period, subject to contract. |
|----|---|

## 9. Quality Evaluation

Question AQA1 is a mandatory question and will be evaluated PASS / FAIL. If you answer No to this question, we will reject your bid and you will be excluded from the competition. We will tell you that your bid has been excluded and why.

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 for example reports or information located on your website.

Each of the quality questions, in section B to H of the quality questionnaire will be independently assessed by our evaluation panel.

When the consensus meeting has taken place and the final mark for each question has been agreed by the evaluators, your final mark for each question will be awarded.

Please note, bidders must:

- achieve a mark greater than 0 for questions AQB1, AQC1, AQD1, AQE1, AQF1, AQG1, AGH1

Bidders who are awarded a mark of 0 for any question AQB1, AQC1, AQD1, AQE1, AQF1, AQG1 and AGH1 will be deemed as having failed in this procurement and their bid will be excluded from further participation in this Procurement.

Final marks for each question are then multiplied by that questions weighting to calculate your weighted mark for that question. Each weighted mark for each question you have submitted a bid for will then be added together to calculate your quality score.

Please see tables A below for an example of how your quality score will be calculated.

Table A

| Question |  | Question Weighting<br>(Total 70%) | Maximum mark available | Your final mark |
|----------|--|-----------------------------------|------------------------|-----------------|
| AQB1     | Working with CCS                                   | 9%                                | 100                    | 9               |
| AQC1     | Engaging and collaborating effectively with Buyers | 12%                               | 100                    | 12              |
| AQD1     | Ensuring a high quality service provision          | 8%                                | 100                    | 8               |
| AQE1     | Demonstrating your ability to provide              | 11%                               | 100                    | 11              |



|                                 |  |     |     |    |
|---------------------------------|--|-----|-----|----|
|                                 | asset finance option appraisals                                    |     |     |    |
| AQF1                            | Demonstrating your ability to provide end to end asset acquisition | 11% | 100 | 11 |
| AQG1                            | Demonstrating your ability to provide leasing portfolio reviews    | 11% | 100 | 11 |
| AQH1                            | Demonstrating your Social Values                                   | 8%  | 100 | 8  |
| <b>Total quality score = 70</b> |  |     |     |    |

## 10. Award quality questionnaire

10.1 The quality questionnaire is split as follows:

- Section A – Mandatory question
- Section B to Section H – Scored questions

10.2 Please refer to Attachment 3 Award Questionnaire for questions in full.

10.3 A high-level summary of all the questions in the quality questionnaire, along with the marking scheme, and weightings for each question is set out below:

|   |  | Marking scheme |
|---|--|----------------|
| <b>Section A – Mandatory service requirements</b> |  |                |
| AQA1  | Compliance with the Mandatory Deliverables | Pass / Fail    |

|  |                  | Marking scheme | Weighting (%) |
|--|------------------|----------------|---------------|
| <b>Section B – Working with CCS (Crown Commercial Service) and the Public Sector</b> |                  |                |               |
| AQB1   | Working with CCS | 100/75/50/25/0 | 9             |

|  |  | Marking scheme | Weighting (%) |
|--|--|----------------|---------------|
|--|--|----------------|---------------|

| <b>Section C – Working with Buyers</b> |  |                |           |
|--|--|----------------|-----------|
| AQC1                                   | Engaging and collaborating effectively with Buyers | 100/75/50/25/0 | <b>12</b> |

|  |   | <b>Marking scheme</b> | <b>Weighting (%)</b> |
|--|---|-----------------------|----------------------|
| <b>Section D – Effective service provision for the duration of the Framework Agreement</b> |   |                       |                      |
| AQD1   | Ensuring a high quality service provision | 100/66/33/0           | <b>8</b>             |

|  |   | <b>Marking scheme</b> | <b>Weighting (%)</b> |
|--|---|-----------------------|----------------------|
| <b>Section E – Service area 1 – Asset finance options appraisals</b> |   |                       |                      |
| AQE1   | Demonstrating your ability to provide asset finance option appraisals | 100/75/50/25/0        | <b>11</b>            |

|  |  | <b>Marking scheme</b> | <b>Weighting (%)</b> |
|--|--|-----------------------|----------------------|
| <b>Section F – Service area 2 - Delivery of end to end asset acquisition</b> |  |                       |                      |
| AQF1   | Demonstrating your ability to provide end to end asset acquisition | 100/75/50/25/0        | <b>11</b>            |

|   |   | <b>Marking scheme</b> | <b>Weighting (%)</b> |
|---|---|-----------------------|----------------------|
| <b>Section G – Service area 3 - Leasing portfolio reviews</b> |   |                       |                      |
| AQG1  | Demonstrating your ability to provide leasing portfolio reviews | 100/75/50/25/0        | <b>11</b>            |

|                                 |  | <b>Marking scheme</b> | <b>Weighting (%)</b> |
|---------------------------------|--|-----------------------|----------------------|
| <b>Section H – Social Value</b> |  |                       |                      |

|      |                                  |                |   |
|------|----------------------------------|----------------|---|
| AQH1 | Demonstrating your Social Values | 100/75/50/25/0 | 8 |
|------|----------------------------------|----------------|---|

## 11. Price evaluation

This paragraph 11 contains information on how to complete the pricing matrix 3 and the price evaluation process.

### 11.1 How to complete your pricing matrix:

Read and understand the instructions in the pricing matrix, and in this paragraph, before submitting your prices.

Your prices should compare with the quality of your offer.

Your prices must be sustainable and include your operating overhead costs and profit.

You should have read and understood the information on TUPE in paragraph 8 of attachment 1 – About the framework. You are reminded that it is your responsibility to take your own advice and consider whether TUPE is likely to apply and to act accordingly. You are encouraged to carry out your own due diligence exercise on the application of TUPE when completing your pricing matrix.

Your prices submitted must:

- exclude VAT.
- be Inclusive of Travel and Subsistence
- percentages must be up to two decimal places
- be in british pounds sterling, up to two decimal places
- for maximum day rates theses must be based on an eight (8) hour Working Day
- Zero or negative bids will not be allowed.

We will investigate where we consider your bid to be abnormally low.

The prices submitted will be the maximum payable under this framework. Prices may be lowered at the call-off stage. Refer to Framework Schedule 3 – Framework Prices.

You must download and complete the pricing matrix Attachment 3a – Pricing Matrix.

You must provide the information that has been requested, in the cells highlighted yellow.

When you have completed your pricing matrix, you must upload this into the eSourcing tool at question PQ1 in the commercial envelope. If you do not upload your pricing matrix your bid may be rejected from this competition.

Do not alter, amend or change the format or layout of the Attachment 3a - Pricing Matrix attachment 3a.

## 11.2 Price evaluation process

This is how we will evaluate your pricing:

We will check you have completed all the yellow cells. Failure to insert an applicable price may result in your bid being deemed non-compliant and may be rejected from this competition. Remember zero or negative prices will not be accepted.

The price evaluation will be undertaken separately to the quality evaluation process.

The weighting for the price evaluation is 30 marks. The 30 marks are allocated as follows:

| Overall Mark for Pricing - 30   |                  |  |                  |  |
|---|------------------|--|------------------|--|
| Options Appraisal - Comprised of Two (2) Component Parts - Total 10 Marks |                  | End to End Asset Acquisition - Comprised of Two (2) Component Parts - Total 10 Marks |                  | Portfolio Reviews - Comprised on One (1) Component Part - Total 10 marks |
| Component Part 1  | Component Part 2 | Component Part 1   | Component Part 2 | Component Part 1   |
| Maximum fee based on Percentage (%) of Asset Value per Tender             | Maximum Day Rate | Maximum fee based on Percentage (%) of Asset Value per Tender                        | Maximum Day Rate | Share of Savings as a Percentage %                                       |
| 9.5 Marks   | 0.5 Marks        | 9.5 Marks  | 0.5 Marks        | 10 Marks   |

### Evaluation methodology: Options Appraisal

Maximum fee based on Percentage (%) of Asset Value per Tender (Component Part 1)

A mean average will be calculated based on the % figures entered against each of the engagement sizes (see the example below)

| Supplier | Monetary Range   | Maximum fee based on Percentage (%) of Asset Value per Tender |                    |                     |                       |                         |                          |                           |               | MEAN AVERAGE (%) |
|----------|--|---|--------------------|---------------------|-----------------------|-------------------------|--------------------------|---------------------------|---------------|------------------|
|          |  | £1 - £50,000  | £50,001 - £150,000 | £150,001 - £500,000 | £500,001 - £1,000,000 | £1,000,001 - £5,000,000 | £5,000,001 - £10,000,000 | £10,000,001 - £20,000,000 | £20,000,001 + |                  |
| Bidder X | Maximum Fee based on Percentages (%) of Asset Value per Tender | 10.00%  | 9.00%              | 8.00%               | 7.00%                 | 6.00%                   | 5.00%                    | 4.00%                     | 3.00%         | 6.50%            |

Using the mean average, a score out of 9.5 Marks will then be calculated based on the methodology below:

Lowest Mean Average Price

$$\text{Score} = \frac{\text{Your Mean Average Price}}{\text{Lowest Mean Average Price}} \times 9.5 = \% \text{ of maximum mark}$$

Maximum day rate (Component Part 2)

Using the figure entered into the 'One Off Charge £ Per Tender' (see the example below)

| Supplier name | Leasing Advisor   | Maximum day rate (£) |
|---------------|-------------------|----------------------|
| Bidder X      | Leasing Advisor X | £10                  |

a score out of 0.5 will then be calculated based on the methodology below:

Lowest Maximum Day Rate

$$\text{Score} = \frac{\text{Your Maximum Day Rate}}{\text{Lowest Maximum Day Rate}} \times 0.5 = \% \text{ of maximum mark}$$

The Marks given for both Component Parts 1 and 2 will be added together to give a Total score out of 10 Marks

### Evaluation methodology: End to End

Maximum fee based on Percentage (%) of Asset Value per Tender (Component Part 1)

A mean average will be calculated based on the % figures entered against each of the engagement sizes (see the example below)

| Supplier | Monetary Range   | Maximum fee based on Percentage (%) of Asset Value per Tender |                    |                     |                       |                         |                          |                           |               | MEAN AVERAGE (%) |
|----------|--|---|--------------------|---------------------|-----------------------|-------------------------|--------------------------|---------------------------|---------------|------------------|
|          |  | £1 - £50,000  | £50,001 - £150,000 | £150,001 - £500,000 | £500,001 - £1,000,000 | £1,000,001 - £5,000,000 | £5,000,001 - £10,000,000 | £10,000,001 - £20,000,000 | £20,000,001 + |                  |
| Bidder X | Maximum Fee based on Percentages (%) of Asset Value per Tender | 10.00%  | 9.00%              | 8.00%               | 7.00%                 | 6.00%                   | 5.00%                    | 4.00%                     | 3.00%         | 6.50%            |

Using the mean average, a score out of 9.5 Marks will then be calculated based on the methodology below:

$$\text{Score} = \frac{\text{Lowest Mean Average Price}}{\text{Your Mean Average Price}} \times 9.5 = \% \text{ of maximum mark}$$

#### Maximum day rate (Component Part 2)

Using the figure entered into the 'One Off Charge £ Per Tender' (see the example below)

| Supplier name | Leasing Advisor   | Maximum day rate (£) |
|---------------|-------------------|----------------------|
| Bidder X      | Leasing Advisor X | £10                  |

a score out of 0.5 will then be calculated based on the methodology below:

$$\text{Score} = \frac{\text{Lowest Maximum Day Rate}}{\text{Your Maximum Day Rate}} \times 0.5 = \% \text{ of maximum mark}$$

The Marks given for both Component Parts 1 and 2 will be added together to give a Total score out of 10 Marks

### Evaluation Methodology: Portfolio Reviews

#### Share of Savings as a Percentage % (Component Part 1)

A mean average will be calculated based on the % figures entered against each of the engagement sizes (see the example below)

| Supplier | Monetary Range                 | Share of Savings as a Percentage % |                    |                     |                       |                         |                          |                           |               | MEAN AVERAGE (%) |
|----------|--------------------------------|------------------------------------|--------------------|---------------------|-----------------------|-------------------------|--------------------------|---------------------------|---------------|------------------|
|          |                                | £1 - £50,000                       | £50,001 - £150,000 | £150,001 - £500,000 | £500,001 - £1,000,000 | £1,000,001 - £5,000,000 | £5,000,001 - £10,000,000 | £10,000,001 - £20,000,000 | £20,000,001 + |                  |
| Bidder X | Maximum Saving Percentages (%) | 9.00%                              | 8.00%              | 7.00%               | 6.00%                 | 5.00%                   | 4.00%                    | 3.00%                     | 2.00%         | 5.50%            |

Using the mean average, a score out of 10 Marks will then be calculated based on the methodology below:

$$\text{Score} = \frac{\text{Lowest Mean Average Price}}{\text{Your Mean Average Price}} \times 10.00 = \% \text{ of maximum mark}$$

Example as follows, based on Options Appraisal Component part 1 (Maximum fee based on Percentage (%) of Asset Value per Tender (Prices are for illustrative purposes only):

|                    |                    |                    |
|--------------------|--------------------|--------------------|
| Bidder A           | Bidder B           | Bidder C           |
| Mean average Price | Mean Average Price | Mean Average Price |
| 2.50               | 5.00               | 7.50               |

1. Bidder A has the lowest mean average of 2.50. Bidder A is therefore awarded the maximum mark available for that component, which 9.50.
2. Bidder B submits a mean average of 5.00. Bidder B is awarded a mark of 4.75.
3. Bidder C submits a mean average of 7.50. Bidder C is awarded a mark of 3.17.

### Final Pricing Score

Where a service area is comprised of more than one component part, the component parts will be added together to give the total mark for that service area. A final pricing score is calculated for each bidder by totalling the marks for the three service areas, as shown below to give the final price score:

|                | Options Appraisal - Total Score<br>(out of 10 Marks) | End to End - Total Score<br>(out of 10 Marks) | Portfolio Reviews - Total Score<br>(out of 10 Marks) | FINAL PRICING SCORE |
|----------------|--|---|--|---------------------|
| Bidder X Price | 9  | 8   | 10   | 27                  |
| Bidder Y Price | 7  | 8   | 8  | 23                  |
| Bidder Z Price | 4  | 6   | 8  | 18                  |

#### 11.3 Abnormally low tenders

Where we consider any of the price(s) or percentage(s) you have submitted to have no correlation with the quality of your offer or to be **abnormally low** or will ask you to explain the price(s) you have submitted (as required in regulation 69 of the Regulations).

If your explanation is not acceptable, we will reject your bid and exclude you from this competition, we will inform you if your bid has been excluded and why.

## 12. Final decision to award

### 12.1 How we will calculate your final score

We will add your quality score to your price score to calculate your final score.

Example:

|  | Quality score | Price score | Final score |
|--|---------------|-------------|-------------|
|--|---------------|-------------|-------------|

| Bidder   | (Maximum score available 70) | (Maximum score available 30) | (Maximum score available 100) |
|----------|------------------------------|------------------------------|-------------------------------|
| Bidder A | 70.00                        | 30.00                        | 100.00                        |
| Bidder B | 60.00                        | 15.00                        | 75.00                         |
| Bidder C | 50.00                        | 12.00                        | 62.00                         |

We will offer bidders whose final score is 51 or above a framework contract as set out in paragraph 3 of attachment 1 – about the framework.

## 12.2 Intention to award

We will tell you if you have been successful or unsuccessful via the eSourcing tool. We will send intention to award letters to all bidders who are still in the competition i.e. who have not been excluded.

At this stage, a standstill period of ten (10) calendar days will start, the term standstill period is set out in regulation 87(2) of the Regulations. During this time, you can ask questions that relate to our decision to award. We cannot provide advice to unsuccessful bidders on the steps they should take and they should seek independent legal advice, if required.

Following the standstill period, and if there are no challenges to our decision, successful bidders will be formally awarded a framework contract subject to signatures.

## 12.3 Framework contract

You must sign and return the framework contract within 10 days of being asked. If you do not sign and return, we will withdraw our offer of a framework contract.

The conclusion of a framework contract is subject to the provision of due 'certificates, statements and other means of proof' where bidders have, to this point, relied on self-certification.

This means the following levels of insurance cover:

Employers (compulsory) Liability Insurance = £5,000,0000

Public Liability Insurance = £5,000,0000

Professional Indemnity Insurance = £5,000,000.