



Crown
Commercial
Service

Invitation to tender
Attachment 2 – How to bid
Voucher Schemes Framework
RM6255

Contents

1.	How to make your bid.....	2
2.	Selection stage.....	2
3.	Selection process	3
4.	Selection criteria	3
5.	Selection questionnaire	3
6.	Award stage.....	3
7.	Award criteria.....	4
8.	Award process.....	4
9.	Quality Evaluation.....	6
10.	Award quality questionnaire.....	7
11.	Price evaluation	13
12.	Final decision to award	16
13.	Intention to award	17
14.	Framework contract.....	17

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 suite**. We can only accept bids that we receive through the eSourcing suite.
- 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 suite throughout the competition. You must log on to the eSourcing suite 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 suite. 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 3 for themselves.
- 2.3 In addition, if you are the lead member of a consortium, you must get each of the other members to answer the questions in Parts 2 and 3 for themselves.
- 2.4 We are providing the '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 suite throughout the competition. You must log on to the eSourcing suite 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 9 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 suite (qualification envelope).

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 11 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 of the quality questionnaire in the eSourcing suite in the technical envelope.
- Complete the price matrix attachment 3.
- Upload your completed price matrix into the eSourcing suite in the commercial envelope to question PQ1, please name the file [price_insertyourcompanyname]

8.2 What **WE** will do at the award stage

1.	<p>Compliance Check</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>Quality Evaluation</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 suite.</p>
3.	<p>Consensus</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 for each lot you have bid for.</p>
4.	<p>Quality Threshold</p> <p>If you have received a zero for any of the quality questions, or if you have not met a minimum quality mark of 59 out of 100, we will reject your bid and you will be excluded from the competition. We will tell you that your bid has been excluded from the competition and why.</p> <p>Refer to the table at paragraph 9 for an example of how your quality score will be calculated.</p>
5.	<p>Evaluate Pricing</p> <p>We will then give your pricing to the price evaluation panel, who are different evaluators from those who assessed your quality responses. They will calculate your price score using the evaluation criteria in paragraph 11 - Price Evaluation.</p>
6.	<p>Final Score</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>
7.	<p>Award</p> <p>Awards will be made to the successful bidders following the standstill period, subject to contract.</p>

9. Quality Evaluation

Question Q1 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, Q2 and Q3 of the quality questionnaire will be independently assessed by our evaluation panel.

Question Q4 is a Pass/ Fail question.

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 multiplied by that question's weighting to calculate your weighted mark for that question.

Each weighted mark for each question will then be added together to calculate your quality score.

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

Table A

Question		Question Weighting	Maximum mark available	Your final mark	Your weighted mark
Q1	Compliance with Framework Schedule 1 (Specification)	N/A	N/A	N/A	N/A
Q2	Implementation	45%	100	50	22.50
Q3	Service management	45%	100	100	45.00
Q4	Social value	10%	100	100	10.00
Quality mark (out of 100)					77.50
Quality weighting 70% - Quality score					54.25

10. Award quality questionnaire

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

Question		Marking scheme	Weighting %
Q1	Compliance with Framework Schedule 1 (Specification)	Pass/Fail	N/A
Q2	Implementation	100/75/50/25/0	45
Q3	Service management	100/80/60/40/20/0	45
Q4	Social value	Pass/Fail	10

Q1 Compliance with Mandatory Service Requirements Framework Schedule 1 (Specification)

If you are awarded a framework contract, will you unreservedly deliver in full, all the mandatory service requirements as set out in Framework Schedule 1 (Specification).

Please answer 'Yes' or 'No'

YES - Yes - You will, unreservedly deliver in full, all the mandatory requirements as set out in Framework Schedule 1 (Specification).

NO - You will not, or cannot, deliver in full, all the mandatory requirements as set out in Framework Schedule 1 (Specification).

Q1 Response guidance

This is a PASS/FAIL question.

If you cannot or are unwilling to select YES to this question, you will be disqualified from further participation in this competition.

You are required to select either option YES or NO from the drop down list.

Providing a YES response means you will unreservedly deliver in full all mandatory service requirements as set out in Framework Schedule 1 (Specification).

If you select NO (or you do not answer the question) to indicate that you will not, or cannot, deliver in full, all the mandatory Goods and Services requirements as set out in Framework Schedule 1 (Specification) you will be excluded from further participation in this competition.

Marking scheme	Evaluation guidance
Pass	You have selected option 'Yes' confirming that you will unreservedly deliver in full all the mandatory service requirements as set out in Framework Schedule 1 (Specification).
Fail	You have selected 'No' confirming that you will not, or cannot, deliver in full all the mandatory service requirements as set out in Framework Schedule 1 (Specification). OR You have not selected either 'Yes' or 'No'.

Q2 - Implementation
<p>Requirement:</p> <p>CCS requires you to demonstrate how you will successfully implement multiple Voucher Schemes whilst meeting Buyers requirements and timescales.</p> <p>Please note your response will form part of Framework Schedule 2 (Framework Tender) and may be used by Buyers in line with Framework Schedule 7 (Call-Off Award Procedure).</p>
<p>Q2 Response Guidance</p> <p>All bidders must answer this question.</p> <p>You must insert your response into the text fields and your implementation plans to question Q2a in the e-Sourcing Suite.</p> <p>In order to satisfy the requirement, you must:</p> <ul style="list-style-type: none"> a) demonstrate how you will ensure that you have in place the appropriate resource and infrastructure to meet the Buyer's requirements. b) demonstrate how you will manage resource and infrastructure capacity when implementing multiple Voucher Schemes at the same time, to ensure all Buyers Go Live dates are met and existing Buyer Voucher Schemes delivery are not negatively impacted. c) demonstrate your approach to working with a Buyer to build an effective implementation plan key milestones, timescales, Buyer dependencies, testing and training for closed loop Voucher Schemes. d) provide an implementation plan including key milestones, timescales, Buyer dependencies, testing and training for a small, medium and large* closed loop Voucher Schemes **

- e) demonstrate your internal process for identifying, tracking and mitigating risks during implementation, and how you will communicate this to the Buyer.

* small = less than 10,000 Recipients

medium = 10,001 to 100,000 Recipients

large = 100,001 plus Recipients

** Each implementation plan must be no longer than 2 pages of A4 and submitted in pdf format.

Please name each implementation plan as follows:

Implementation plan, small	sml_insertyourcompanyname
Implementation plan, mediuml	med_insertyourcompanyname
Implementation plan, large	lge_insertyourcompanyname

Please attach a zip file containing each of your implementation plans, name the file [IP_ insertyourcompanyname] to question Q2a.

Please attend to layout, spelling, punctuation and grammar. Address each of the component parts in the order they are listed in this response guidance. State which part you are responding to.

Maximum character count – 8,000 characters including spaces and punctuation.

You must not exceed the character count within the e-Sourcing suite. Responses must include spaces between words. The implementation plans are the only attachments permitted; any additional documents submitted will be ignored in the evaluation of this question.

You are required to insert your response to this question in the technical envelope in the applicable text boxes provided, each box has a character count of 2,000 characters, and upload your implementation plans to Q2a.

Marking scheme	Evaluation guidance
100	The Bidder's response fully addresses the requirement and all 4 of the component parts (a, b, c, and e) of the response guidance above. The Bidder has submitted 3 implementation plans which fully address component part (d).
75	The Bidder's response fully addresses 3 of the 4 component parts (a, b, c, and e) of the response guidance above. The Bidder has submitted 3 implementation plans which fully address component part (d).
50	The Bidder's response fully addresses 2 of the 4 component parts (a, b, c, and e) of the response guidance above. The Bidder has

	submitted 3 implementation plans which fully address component part (d).
25	The Bidder's response fully addresses 1 of the 4 component parts (a, b, c, and e) of the response guidance above. The Bidder has submitted the 3 implementation plans which fully address component part (d).
0	The Bidder's response has not fully addressed any of the 4 component parts (a, b, c, and e) of the response guidance above, and has not submitted 3 required implementation plans as required in component part (d). OR A response has not been provided to this question

Q3 Service management

Requirement:

CCS requires you to provide Voucher Scheme service management which includes tracking and management of unused vouchers, Buyer and Recipient support, operational delivery management, media and public interest management and continuous improvement.

Please note your response will form part of Framework Schedule 2 (Framework Tender) and may be used by Buyers in line with Framework Schedule 7 (Call-Off Award Procedure).

Q3 Response Guidance

You must insert your response into the text fields in the e-Sourcing Suite.

In order to satisfy the requirement, you must demonstrate:

- a) the controls you will have in your system for voucher tracking, management of unused vouchers, and how that information is provided to the Buyer.
- b) how you will manage Customer Service through times of peak demand whilst ensuring all Buyers and Recipients are supported in the effective use of their Voucher Schemes.
- c) how you will effectively manage the impact of operational delivery problems that Recipients may experience i.e. system access, redemption issues, merchant errors.
- d) how you will manage media and public interest in order to minimise reputational damage to the Buyer.
- e) how you will measure the success of a Voucher Scheme and use Buyers and Recipients feedback to drive continuous improvement.

Please attend to layout, spelling, punctuation and grammar. Address each of the component parts in the order they are listed in this response guidance. State which part you are responding to.

Maximum character count – 10,000 characters including spaces and punctuation.

You must not exceed the character count within the e-Sourcing suite. Responses must include spaces between words. No attachments are permitted; any additional documents submitted will be ignored in the evaluation of this question.

You are required to insert your response to this question in the technical envelope in the applicable text boxes provided, each box has a character count of 2,000 characters.

Marking scheme	Evaluation guidance
100	The Bidder's response fully addresses the requirement and all 5 of the component parts (a to e) of the response guidance above
80	The Bidder's response fully addresses 4 of the 5 component parts (a to e) of the response guidance above
60	The Bidder's response fully addresses 3 of the 5 component parts (a to e) of the response guidance above
40	The Bidder's response fully addresses 2 of the 5 component parts (a to e) of the response guidance above
20	The Bidder's response fully addresses 1 of the 5 component parts (a to e) of the response guidance above
0	The Bidder's response has not fully addressed any of the 5 component parts (a to e) of the response guidance above. OR A response has not been provided to this question

Q4 Social Value

Requirement

CCS requires all Suppliers to promote social value in the delivery of the services, as set out in Framework Schedule 1 (Specification).

Q4 Response Guidance

This is a Pass/Fail question. If you cannot or are unwilling to select 'Yes' to this question, you will be disqualified from further participation in this competition.

Selecting option 'Yes' means that you unreservedly agree to deliver all elements of this requirement in full.

<p>In order to satisfy the requirement, you must agree to promote social value in the delivery of the services.</p> <p>a) Fighting climate change (Effective stewardship of the environment): You shall ensure that the performance of the contract, or the way in which the contract is performed, results in environmental protection and improvement, including working towards net zero greenhouse gas emissions.</p> <p>b) Tackling economic inequality (Create new businesses, new jobs, new skills): Where creating new employment and training opportunities Suppliers shall take action to support those who face barriers to employment and support educational attainment relevant to the contract, including training schemes that address skills gaps and result in recognised qualifications.</p>	
Marking scheme	Evaluation guidance
Pass	You have selected option 'Yes' confirming that you unreservedly agree to deliver all elements of this requirement in full, including the 2 component parts a and b of the response guidance above.
Fail	<p>You have selected option 'No' confirming that you will not, or cannot, unreservedly agree to deliver all elements of this requirement in full including the 2 component parts, a and b of the response guidance above.</p> <p>OR</p> <p>You have not selected either 'Yes' or 'No'</p>

11. Price evaluation

This paragraph 11 contains information on how we will evaluate your pricing.

11.1 We will check you have completed all the green cells.

Failure to insert an applicable percentage 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.

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

11.3 Calculating your marks

The bidder who submits the lowest maximum percentage of Total Voucher Value that is chargeable for the Order for a Total Voucher Order Value range will be awarded the maximum marks available for that Total Voucher Order Value range, all other bidders will get a mark relative to the lowest maximum percentage of Total Voucher Value that is chargeable for the Order submitted. We will apply this methodology to all 4 Total Voucher Order Value ranges and both Voucher types, Table 1 Closed Loop – Grocery merchants and Table 2 Closed Loop – Non Grocery merchants.

11.4 The calculation we will use is as follows:

Lowest maximum
percentage of Total
Voucher Value

$$\text{Mark} = \frac{\text{Bidders maximum percentage of Total Voucher Value}}{\text{Lowest maximum percentage of Total Voucher Value}} \times \text{maximum mark available}$$

11.5 All calculations will be rounded to 2 decimal places using excel.

11.6 Example: Table 1 Closed Loop – Grocery merchants

	Total Voucher Order Value range			
	Up to £24,999,999	£25,000,000 to £74,999,999	£75,000,000 to £149,999,999	Over £150,000,000
Bidder A	50	80	60	70
Bidder B	80	50	80	80
Bidder C	90	60	50	60

Weightings	35%	20%	10%	5%
Maximum mark available	35	20	10	5

a) For Total Voucher Order Value of up to £24,999,999

Bidder A has the lowest maximum percentage of Total Voucher Value of 50.00.
Bidder A is awarded the maximum mark available, which is 35

Bidder B submits a maximum percentage of Total Voucher Value of 80, Bidder B is awarded a mark of 21.88.

Bidder C submits a maximum percentage of Total Voucher Value of 90 and is awarded a price score of 19.44

b) For Total Voucher Order Value of £25,000,000 to £74,999,999

Bidder B has the lowest maximum percentage of Total Voucher Value of 50.00. and is awarded the maximum mark available, which is 20

Bidder A submits a maximum percentage of Total Voucher Value of 80, and is awarded a mark of 12.50

Bidder C submits a maximum percentage of Total Voucher Value of 60 and is awarded a price score of 16.67

c) For Total Voucher Order Value of £75,000,000 to £149,999,999

Bidder C has the lowest maximum percentage of Total Voucher Value of 50.00. and is awarded the maximum mark available, which is 10

Bidder A submits a maximum percentage of Total Voucher Value of 60, and is awarded a mark of 8.33

Bidder B submits a maximum percentage of Total Voucher Value of 80 and is awarded a price score of 6.25

d) For Total Voucher Order Value of over £150,000,000

Bidder C has the lowest maximum percentage of Total Voucher Value of 60.00. and is awarded the maximum mark available, which is 5

Bidder A submits a maximum percentage of Total Voucher Value of 70, and is awarded a mark of 4.29

Bidder B submits a maximum percentage of Total Voucher Value of 80 and is awarded a price score of 3.75

11.7 We will then add each bidders' marks for each of the Total Voucher Value ranges together

Example: Closed Loop – Grocery merchants

	Total Voucher Order Value range				Marks for table 1 Closed Loop - Grocery merchants
	Up to £24,999,999	£25,000,000 to £74,999,999	£75,000,000 to £149,999,999	Over £150,000,000	
Bidder A	35.00	12.50	8.33	4.29	60.12
Bidder B	21.88	20.00	6.25	3.75	51.88
Bidder C	19.44	16.67	10.00	5.00	51.11

11.8 We will repeat the process for Table 2 Closed Loop – Non Grocery merchants

11.9 We will then add together the marks each bidder achieved for Table 1 Closed Loop -Grocery merchants and Table 2, Closed Loop – Non Grocery merchants.

This will give the bidder a price mark out of 100.

Example – How we will calculate bidders price mark

	Marks for table 1 Closed Loop - Grocery merchants (maximum marks available 70)	Marks for table 2, Closed Loop – Non Grocery merchants (maximum marks available 30)	Bidders price mark (maximum marks available 100)
Bidder A	60.12	15.23	75.35
Bidder B	51.88	20.56	72.44
Bidder C	51.11	18.63	69.74

11.10 As the pricing evaluation is weighted at 30% we will then multiple the bidders price mark by 30% to calculate the bidders price score.

Example – How we will calculate bidders price score

	Bidders price mark	Price weighting	Bidders Price Score
Bidder A	75.35	x 30%	= 22.61
Bidder B	72.44	x 30%	= 21.73
Bidder C	69.74	x 30%	= 20.92

11.11 Abnormally low tenders

Where we consider the total basket price 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:

Bidder	Quality score (Maximum score available 70)	Price score (Maximum score available 30)	Final score (Maximum score available 100)
Bidder A	54.25	22.61	76.86
Bidder B	60.00	21.73	81.73
Bidder C	50.00	20.92	70.92

We will offer a framework contract to all bidders who achieve or exceed a final score of 45.00.

13. Intention to award

We will tell you if you have been successful or unsuccessful via the eSourcing suite. 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.

14. 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:

- Employer's (Compulsory) Liability Insurance* = £5,000,000
- Public Liability Insurance = £5,000,000
- Professional Indemnity Insurance = £5,000,000
- Cyber Essentials Plus certificate
- ISO/IEC 27001 Information Security Management or equivalent

Please note, if you have indicated in your response to the selection questionnaire that you already have a:

- Cyber Essentials Plus certificate
- ISO/IEC 27001 Information Security Management or equivalent

You will be required to provide evidence at the Framework award stage.

If you have indicated that you are working towards:

- Cyber Essentials Plus certificate, you will be required to provide evidence of the certification within ninety (90) days of the Framework Start Date
- ISO/IEC 27001 or equivalent certification, you will be required to provide evidence of the certification within one hundred and eighty (180) days of the Framework Start Date

Please note you will not be able to be able to bid for or be awarded any Call Off Contracts until you have submitted to CCS your Cyber Essentials Plus certificate and your ISO/IEC 27001 or equivalent certification.