**DOCUMENT 4: EVALUATION CRITERIA**

**INSTRUCTIONS:**

1. We want the Contractor to develop a set of online resources to support the DSL with their role.

2. Bidders should set out a detailed response, using the format provided in Document 1– Instructions on the tendering procedures.

4. Please note that the information below relates directly to the scoring and evaluation matrix for bids. ‘Quality’ scoring represents 70% of the overall evaluation. ‘Cost and value for money’ represents the remaining 30%.

5. Please provide all answers within Document 5 – ITT Supplier Response form and Document 6 – Cost Matrix. Additional attachments will not be accepted unless specifically requested within a question.

6. Following this evaluation, we may want to ask verification/clarification questions prior to making a final decision. The decision to award will be subject to a final moderation. This will use the written responses submitted but will ensure that all evaluators have the same understanding of the original intention of these responses.

7. Social value: for full details on the policy themes and outcomes, including suggested activities that could demonstrate your delivery of these please see:

[PPN 06\_20 Taking Account of Social Value in the Award of Central Government Contracts (3) (publishing.service.gov.uk)](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/921437/PPN-06_20-Taking-Account-of-Social-Value-in-the-Award-of-Central-Government-Contracts.pdf).

8. The financial budget for this service is £250,000. Submissions that exceed this limit will be considered non-compliant and will not proceed to the next evaluation stage.

9. All costs should be quoted exclusive of VAT but please indicate if the project will attract VAT.

10. If your proposal includes costs for sub-contractors these costs must be shown inclusive of any VAT element (e.g. sub-contractor’s costs to you are £10,000 plus VAT, your proposal should show sub-contractors costs as £12,000 inclusive of VAT @ 20%).

11. We would expect monthly reporting against spending. Payments of costs to the successful supplier will be made upon successful completion of agreed milestones by BACS transfer following receipt of a valid invoice.

**EVALUATION CRITERIA:**

|  |  |  |  |
| --- | --- | --- | --- |
| Section | Question | Number of words | Weighting |
| 1: Policy solution | With reference to Document 3 (Service Specification) and guidance below, please set out how you will deliver the required policy solution. | 1000 | 25% |
| 2: User research and digital skills | With reference to Document 3 (Service Specification) and guidance below, please set out how you will meet the required user research and digital skill requirements. | 800 | 20% |
| 3: Project and risk management | With reference to Document 3 (Service Specification) and guidance below, please set out how you will fulfil the project and risk management requirements. | 500 + 1 page project plan + 1 page risk register | 15% |
| 4: Social Value | Please set out how you will fulfil the Social Value requirements. | 400 | 10% |
| 5: Costs and value for money | As with all government contracts, we expect clearly to see value for money in your estimated costs. Please set out your costs using the cost matrix provided (Document 6).  All costs **must be stand-alone for initial term of this contract** and not rely on interdependencies, shared costs etc. with any other Government contract.  All pricing information should be presented in British Pounds (£), exclusive of VAT and rounded to the nearest pound.  Potential Suppliers **must** identify if VAT will be chargeable against each cost and if so at what rate.  **It is the responsibility of Potential Suppliers to check the VAT position with HMRC before submitting a bid**. | 500 for detailing of assumptions | 30% (25% cost scoring + 5% for cost assumptions) |

**EVALUATION PROCESS**

12. This section describes how the bids will be scored, together with the scoring mechanism and associated weightings for each section. The tender process will be conducted in a manner that ensures all are evaluated fairly to ascertain the most economically advantageous tender.

**13. OVERVIEW OF AWARD STAGE EVALUATION PROCESS**

13.1 Paragraphs 13, 14, 15 and 16 below set out and explain the procedure, steps and process by which the Authority will assess a Potential Contractor’s Tender. The evaluation procedure is divided into two steps;

13.1.1 **Step 1: Compliance / Validation** – The Authority will check Tenders to ensure they are compliant with the ITT and that all responses are valid. Non-compliant Tenders may be excluded from this Procurement by the Authority.

13.1.2 **Step 2a: Tender Evaluation - Quality Evaluation** – The Authority will assess responses to Document 5 (ITT Supplier Response form) in accordance with paragraph 15 below. Tenders that do not meet the Quality Threshold will be excluded from this Procurement by the Authority and will not proceed to the Price Evaluation.

13.1.3 **Step 2b: Tender Evaluation - Price Evaluation** – The Authority will assess responses to Document 6 (Cost Matrix) in accordance with paragraph 16 below.

13.2 The maximum possible score capable of being achieved by a Potential Contractor for the Award Stage Evaluation is 100 points being the combined sum of the scores achieved for Quality Evaluation, namely 70, and the Price Evaluation, namely 30.

13.3 This procurement will be awarded on the basis of the Most Economically Advantageous Tender. The Authority will assess which Tender constitutes the Most Economically Advantageous Tender based on the methodologies detailed in Sections 15 and 16 and calculated as per paragraph 16.2.

13.4 **Consensus Marking Procedure**

13.4.1 Responses to the scored questions in Document 5 – ITT Supplier Response form will be evaluated in accordance with the procedure described in this paragraph.

13.4 2. The Consensus Marking Procedure is a two-step process, comprising of:

1. Independent evaluation; and
2. Group consensus marking.

13.4.3 During the independent evaluation process each evaluator will separately (i.e. without conferring with other evaluators) scrutinise the quality of answers given by the Potential Contractor in their ITT Supplier Response form (Document 5). Evaluators will apply the criteria applicable to the question as set out in the evaluation guidance to determine the overall quality of each answer. Each evaluator will then allocate a mark for the answer in accordance with the Marking Scheme applicable to that question. Each evaluator will also provide a justification for the mark he/she attributed to an answer. All the evaluators’ marks and related justifications will be recorded separately.

13.4.4 When the independent evaluation exercise has been completed by all the evaluators, a group consensus marking exercise will be coordinated by a moderator as follows:

13.4.5 The moderator will review the marks allocated by the individual evaluators together with their justifications for awarding the marks.

13.4.5.1 The moderator will arrange for the evaluators to meet and discuss the marks they have allocated to answers provided in the ITT Supplier Response form. The consensus marker will facilitate discussion among the evaluators regarding the marks awarded and the related justifications.

13.4.5.2 During the meeting, each evaluator will discuss the quality of the answers given to a question and review his/her justification for attributing the marks having regard to the relevant response guidance, evaluation and the marking scheme. The evaluators will continue discussing the answers until the evaluators reach a consensus regarding the mark that should be attributed to each Potential Contractor’s answer to the question.

13.4.5.3 The moderator will record the consensus mark and the justification for the consensus mark (in addition to each evaluator’s original mark and justification).

13.4.5.4 The process above will be repeated until all applicable answers in the ITT Supplier Response form have been consensus marked by evaluators.

13.4.5.5 Where evaluators cannot agree on a consensus mark, the consensus marker will use the view of the majority as the consensus mark and record this justification.

**14.** **COMPLIANCE / VALIDATION STEP**

14.1 Prior to commencing the formal evaluation process, Tenders will be checked to ensure they are compliant with the requirements of this ITT and its Attachments. Any non-compliant Tenders may, including in the event further questions are asked or clarification is sought by the Potential Contractors but fail to produce a satisfactory response, be rejected by the Authority without proceeding to the next step of evaluation.

14.2 Potential Contractors who are excluded on grounds of non-compliance will be notified accordingly.

**15. QUALITY EVALUATION**

15.1 Tenders will first be evaluated against the Quality Evaluation. All Tenders that meets or exceed the Quality Threshold as detailed in paragraph 15.2 will progress to the Price Evaluation step as detailed in paragraph 16. Any Potential Contractor whose Tender fails to achieve the Quality Threshold may, at the Authority’s absolute discretion, be excluded from further participation in this Procurement.

15.2 In order to meet the Quality Threshold Potential Contractors must:

1. achieve or exceed a Quality Score equivalent to 60% of the Maximum Score Available for the Quality Evaluation, and;
2. achieve a score of 2 or above (unweighted) in each individual question response in the quality evaluation.

15.3 **Quality Evaluation Process**

15.3.1 The Quality Evaluation is weighted at 70% of the total marks available in this Procurement.

15.3.1.1 The evaluation of each Potential Contractor’s response to the ITT Supplier Response form will be conducted and consensus checked in accordance with the Consensus Marking Procedure described in paragraph 13.4 of this document.

15.3.1.2 When the Consensus Marking Procedure has been completed each response will be awarded a score out of 5 in line with the evaluation scoring criteria outlined in section 15.5.

15.3.1.3 To reflect the weightings stated in the Evaluation Criteria table above, the score awarded for each response to the ITT Supplier Response form will then be multiplied as shown in the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Question** | **Maximum score possible** | **Weighted score adjuster** | **Maximum Score Available** |
| With reference to Document 3 (Service Specification) and guidance below, please set out how you will deliver the required policy solution. | 5 | 5 | 25 |
| With reference to Document 3 (Service Specification) and guidance below, please set out how you will meet the required user research and digital skill requirements. | 5 | 4 | 20 |
| With reference to Document 3 (Service Specification) and guidance below, please set out how you will fulfil the project and risk management requirements. | 5 | 3 | 15 |
| Please set out how you will fulfil the Social Value requirements. | 5 | 2 | 10 |
| **Maximum Score Available** | |  | **70** |

15.3.1.4 The weighted score for each response will be added together to determine a total “**Quality Score**” for the Quality Evaluation out of 70.

15.3.1.5 Tenders that do not receive a Quality Score of 42 or above will, in line with the quality threshold outlined in paragraph 15.2, be excluded from further participation in the procurement.

15.4 **Clarification / Verification**

15.4.1 Following the Quality Evaluation the Authority reserves the right to seek clarification/verification on elements of a Potential Contractors response(s) before awarding a final score. This could be either as correspondence via the messaging facility in the e-Sourcing Suite or as a face-to-face interview.

15.4.2 The context provided by the Potential Contractor will be used to clarify and/or verify the original response(s) to the Quality Evaluation and therefore may impact on the moderated score. On receipt of Potential Contractors response(s) to clarification/verification questions the evaluation panel will re-convene to agree a final score in light of the context provided.

15.4.3 The clarification/verification process is not an opportunity for Potential Contractors to provide additional information or address omissions within their tender responses. The questions asked will be specific to elements of the quality evaluation responses that have been identified as requiring clarification/verification and should an interview be held the Potential Contractor will be provided with the questions prior to the interview.

15.4.4 The decision to invite a Potential Contractor to a clarification interview is solely at the Authority’s discretion and there is no obligation to invite any or all Potential Contractors to interview. The Authority’s default approach is to manage clarifications via correspondence and interviews will only be held where the panel feel there is justification to do so.

**15.5 Quality Scoring Scale**

15.5.1 The following scoring scale will be used:

|  |  |  |
| --- | --- | --- |
| Assessment | Marks | Criteria |
| Excellent | 5 | The response answers the question in full, successfully meets all the criteria, and presents proposals that exceed or enhance the Department’s requirement.  Full and relevant evidence is provided to enhance the response.  Demonstrates a comprehensive level of knowledge, experience, capability, or capacity and demonstrates that the Potential Provider can meet the requirement in full and to a high standard. |
| Good | 4 | The response answers the question in full and successfully meets all the criteria.  Full and relevant evidence is provided to support the response.  Demonstrates a good level of knowledge, experience, capability, or capacity and no concerns or omissions are identified. |
| Satisfactory | 3 | The response answers the question and meets the criteria to a satisfactory standard but may lack some clarity or detail in how the proposed solutions will be achieved.  Relevant evidence is provided to support the response. Lack of clarity and any missing evidence or detail is only minor.  Demonstrates a satisfactory level of knowledge, experience, capability, or capacity and any concerns or omissions are not considered to represent a risk or could be reasonably resolved. |
| Poor | 2 | The response does not answer the question in full and either satisfies only some of the criteria or exhibits omissions regarding meeting the criteria.  Some evidence is provided to support the response but is lacking in sufficient detail in one or more areas.  Demonstrates a lack of knowledge, experience, capability, or capacity and presents concerns or omissions that are considered to represent a risk or would have an impact on service delivery that would require significant external intervention to manage or resolve. |
| Very Poor | 1 | The response does not answer the question and either fails to meet a number of the criteria or exhibits clear and significant omissions with regard to meeting the criteria.  Inadequate or no supporting evidence has been provided to support the response.  Demonstrates a lack of knowledge, experience, capability, or capacity and presents significant concerns or omissions that are considered to represent an unacceptable level of risk and/or would have a detrimental impact on service delivery. |
| Unacceptable | 0 | The response is absent or incomplete and/or the proposals are not relevant to the Department’s requirements. The response does not meet the Department’s requirements. |

1. **Costs and value for money**

16.1 The costs and value for money evaluation criteria consists of the following:

1. Cost scoring – 25%
2. Cost assumptions – 5%

16.2 Cost scoring represents 25% of the overall evaluation. The bidder with the lowest cost will receive 25% of the total overall marks and all other bids will be marked as a proportional variance from the top scoring bid. An illustrative example is provided below:

Supplier Price (Please note the figures are purely for illustrative purposes)

|  |  |  |  |
| --- | --- | --- | --- |
| Calculation Final Finance Mark | A | £200k | 25% |
| B | £210k | (200/210) x 25 = 23.8% |
| C | £225k | (200/225) x 25 = 22.2% |
| D | £250k | (200/250) x 25 = 20% |
|  | E | £300k | Excluded in line with paragraph 8 |

16.3 Cost assumptions represent 5% of the overall evaluation and will be awarded a mark of 1 to 5. The bidder will need to set out the assumptions made in terms of costs e.g. number of days/FTE allocated. The bidder will also need to include details on how they have ensured that the budget is sufficient for the work required.

The scoring scale, as provided in 15.5.1, will be used for this question.