



Crown
Commercial
Service

Invitation to Tender Attachment 2 – How to Bid

RM6273 Employee Benefits and 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 services if your bid is successful.
- 1.2 You may bid for one, any combination or all of the Lots. Please ensure you read sections 3 and 4 of Attachment 1 – About the Framework.
- 1.3 Your bid must be **entered into the eSourcing suite**. We can only accept bids that we receive through the eSourcing suite.

If you are bidding as a consortium, please submit your bid in the name of the lead member and follow the instructions when completing the selection questionnaire within the eSourcing suite (qualification envelope), including providing the name of the consortium at question 1.8.2.

If you are bidding as a single entity on a Lot and as a consortium on another Lot, you will need to set up an additional account in the eSourcing suite. Please submit your bids as follows:

- For your bid as a single entity, please submit your bid in the eSourcing suite in the name of your organisation.
- For your bid as a consortium, please create an additional account in the eSourcing suite in the name of your consortium.

In both cases, when submitting your bid(s) please follow the instructions when completing section 1.8 (Group or Consortium Details) of the selection questionnaire within the eSourcing suite (qualification envelope).

- 1.4 Upload **ONLY** those attachments we have asked for. Do not upload any attachments we haven't asked for.
- 1.5 Make sure you answer every question.
- 1.6 You must submit your bid before the bid submission deadline set out at section 5 (Timelines for the competition) in Attachment 1 - About the Framework.
- 1.7 It will be our decision whether we will accept bids submitted after the bid submission deadline.
- 1.8 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.
- 1.9 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 section 6 (When and how to ask questions) in Attachment 1 - About the Framework.
- 1.10 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 questions, they must answer the questions 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 of the selection questionnaire for themselves.
- 2.4 We have provided Attachment 4 – Information and Declaration Workbook 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 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.
 - you, or a member of your consortium, do not pass the economic and financial standing assessment to the satisfaction of CCS.
 - your bid is deemed non-compliant.
 - any of the information you have provided proves to be false or misleading.
 - you have broken any of the competition rules set out in Attachment 1 – About the Framework, or have 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

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

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

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

6.4 When completing your bid, you must:

- Read through the entire ITT pack carefully, including Attachment 1a – Framework Schedule 1 (Specification), and read more than once.
- Read each question, the response guidance, marking scheme and evaluation criteria.
- Read the contract terms set out at Attachment 10 – Framework Contract Documents.
- If you are unsure, ask questions before the clarification questions deadline See sections 5 (Timelines for the competition) and 6 (When and how to ask questions) in Attachment 1 - About the Framework.
- 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

7.1 The Award Stage consists of a quality evaluation (see sections 9 and 10 of this document) and a price evaluation (see section 11 of this document).

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

7.3 In each Lot, the Quality weighting is 80% and the Price weighting is 20%.

8. Award process

8.1 What YOU need to do

- answer the relevant quality questions sections A, B, C and D of the quality questionnaire in the eSourcing suite within the technical envelope.
- For each Lot you are bidding for, complete the required Attachment 3 - Pricing Matrix. In each Lot, upload your completed pricing matrix into the relevant question in the eSourcing suite within the commercial envelope, in accordance with the table below:

Lot:	Pricing Matrix to be completed:	Upload completed Pricing Matrix to question:
Lot 1	Attachment 3a - Pricing Matrix Lot 1	PQ1 at section 3.1.2
Lot 2	Attachment 3b - Pricing Matrix Lot 2	PQ2 at section 3.2.2
Lot 3	Attachment 3c - Pricing Matrix Lot 3	PQ3 at section 3.3.2
Lot 4	Attachment 3d - Pricing Matrix Lot 4	PQ4 at section 3.4.2
Lot 5	Attachment 3e - Pricing Matrix Lot 5	PQ5 at section 3.5.2
Lot 6	Attachment 3f - Pricing Matrix Lot 6	PQ6 at section 3.6.2

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 have 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.</p> <p>Once the consensus meetings have taken place, the consensus manager(s) will review the consensus marks and reasons for the marks</p>

	agreed with evaluators for any errors or discrepancies. If any errors or discrepancies are identified, marks may be changed as a result of this moderation exercise. The reasons for revisiting the marks and the outcome of revisiting the marks will be fully recorded.
4.	<p>Quality Threshold</p> <p>If you receive a mark of 0 (zero) any of the quality questions, we will reject your bid and you will be excluded from the competition for the applicable Lot(s). We will tell you that your bid has been excluded from the competition and why.</p> <p>Section 9.6 below sets out 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.</p> <p>They will calculate your Price Score in accordance with the process and evaluation criteria set out at section 11 – Price Evaluation.</p>
6.	<p>Final Score</p> <p>Your Quality Score (out of 80) will be added to your Price Score (out of 20) to create your Final Score (out of 100), as illustrated below in section 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

- 9.1** Question A1 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.
- 9.2** 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).
- 9.3** Each of the quality questions in sections B, C and D of the quality questionnaire will be independently assessed by our evaluation panel.
- 9.4** 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.

9.5 In each Lot you have bid for, each weighted mark for each question will then be added together to calculate your Quality Score.

9.6 Please see tables A and B below for an example of how your Quality Score will be calculated:

Table A – Lot 1

Question		Question Weighting	Maximum Mark Available	Your Final Mark	Your Weighted Mark
B1	Implementation and Exit Strategy	12%	100	50	6.00
B2	Social Value	10%	100	66	6.60
B3	Customer Service and Support	15%	100	100	15.00
C1	Online Employee Benefits Platform	15%	100	50	7.50
C2	Provision of Mandatory Products and Services	14%	100	100	14.00
C3	Employee Discount Scheme	14%	100	100	14:00
Quality Score / 80:					63.10

Table B – Lots 2 – 6

Question		Question Weighting	Maximum mark available	Your final mark	Your weighted mark
B1	Implementation and Exit Strategy	23%	100	75	17.25

B2	Social Value	10%	100	66	6.60
B3	Customer Service and Support	23%	100	33	7.59
D1	Integration of Products and/or Services	24%	100	100	24.00
Quality Score / 80					55.44

10. Award quality questionnaire

10.1 The quality questionnaire is split into three sections:

- Section A – Mandatory Service Requirements
- Section B – Quality Questions (All Lots)
- Section C – Lot 1 Quality Questions (Lot 1 only)
- Section D - Lots 2 – 6 Quality Question (Lots 2 – 6 only)

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

Lot 1:

Lot 1 Questions		Marking scheme	Weighting (%)
Section A: Mandatory Service Requirements			
A1	Compliance with Framework Schedule 1 (Specification)	Pass/Fail	N/A
Section B: Quality Questions (All Lots)			
B1	Implementation and Exit Strategy	100/75/50/25/0	12
B2	Social Value	100/66/33/0	10
B3	Customer Service and Support	100/66/33/0	15

Section C: Lot 1 Quality Questions (Lot 1 only)			
C1	Online Employee Benefits Platform	100/75/50/25/0	15
C2	Provision of Mandatory Products and Services	100/66/33/0	14
C3	Employee Discount Scheme	100/66/33/0	14

Lots 2 – 6:

Lots 2 - 6 Questions		Marking scheme	Weighting (%)
Section A: Mandatory Service Requirements			
A1	Compliance with Framework Schedule 1 (Specification)	Pass/Fail	N/A
Section B: Quality Questions (All Lots)			
B1	Implementation and Exit Strategy	100/75/50/25/0	23
B2	Social Value	100/66/33/0	10
B3	Customer Service and Support	100/66/33/0	23
Section D: Lots 2 – 6 Quality Question (Lots 2 – 6 only)			
D1	Integration of Products and/or Services	100/75/50/25/0	24

10.3 The quality questionnaire is set out below:

Section A – Mandatory Service Requirements	
A1 – Compliance with Framework Schedule 1 (Specification)	
If you are awarded a framework contract in any or all of Lots 1 – 6, will you unreservedly deliver in full the mandatory service requirements for the applicable Lots, as set out in Framework Schedule 1 (Specification)?	
<p>A1 Response guidance</p> <p>This is a Pass/Fail question.</p> <p>If you cannot or are unwilling to select ‘Yes’ to this question, you will be disqualified from further participation in this competition.</p> <p>You are required to select either option YES, NO from the drop down list.</p> <p>Providing a ‘Yes’ response means you will unreservedly deliver in full all the mandatory service requirements for the applicable Lots, as set out in Attachment 1a - Framework Schedule 1 (Specification).</p> <p>If you select ‘No’ (or do not answer the question) to indicate that you will not, or cannot, deliver in full all the mandatory service requirements for the applicable Lots, as set out in Attachment 1a - Framework Schedule 1 (Specification), you will be excluded from further participation in this competition.</p>	
Marking scheme	Evaluation guidance
Pass	You have selected option ‘Yes’ confirming that you will unreservedly deliver in full all the mandatory service requirements for the applicable Lots, as set out in Attachment 1a - Framework Schedule 1 (Specification).
Fail	You have selected ‘No’ confirming that you will not, or cannot, deliver in full all the mandatory service requirements for the applicable Lots, as set out in Attachment 1a - Framework Schedule 1a (Specification).

Section B – Quality Questions (All Lots)

B1 - Implementation and Exit Strategy (All Lots)

B1 Requirement:

We require you to demonstrate how you will successfully implement and launch the services for a Buyer, and how you will ensure the Buyer has a seamless transition to you from their incumbent supplier(s).

B1 Response guidance

All bidders must answer this question. You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement, your response must:

- a) Set out the key activities within your implementation strategy, including the roles and responsibilities that will be allocated to your staff, how you will identify the data security requirements for the services, and how you will deliver testing of the services. Your response must demonstrate how your approach will ensure the successful implementation of the services in accordance with paragraph 14.2 of Attachment 1a - Framework Schedule 1 (Specification).
- b) Demonstrate how your implementation process, including the KPIs you will use to measure performance, will ensure that you successfully deliver a seamless mobilisation, service transfer and continuity of services from the Buyer's incumbent supplier(s) in accordance with paragraph 14.2.2 of Attachment 1a - Framework Schedule 1 (Specification).
- c) Demonstrate how you will communicate effectively with the Buyer to support the successful implementation of the services, including the tools and channels you will use, and set out your approach to issue resolution, demonstrating how this will ensure customers are fully sighted and that the issues are resolved at pace and without causing a delay to the implementation timetable in accordance with paragraph 14.2 of Attachment 1a - Framework Schedule 1 (Specification).
- d) Demonstrate how you will ensure the Buyer's personnel are trained and able to deliver the services from launch, including how you will develop knowledge of the Buyer's policies, processes, organisation and culture to ensure the training is fit for purpose in accordance with paragraph 14.2.12 of Attachment 1a - Framework Schedule 1 (Specification).

Your response should be limited to, and focused on, each of the component parts of the question posed a to d. You must not make generalised statements or give irrelevant information.

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. 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 boxes 2.2.3, 2.2.4, 2.2.5 and 2.2.6 each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking Scheme 100/75/50/25/0

Marking scheme	Evaluation criteria
100	The bidder's response fully addresses all 4 of the component parts (a to d) of the response guidance above.
75	The bidder's response fully addresses 3 of the 4 component parts (a to d) of the response guidance above.
50	The bidder's response fully addresses 2 of the 4 component parts (a to d) of the response guidance above.
25	The bidder's response fully addresses 1 of the 4 component parts (a to d) of the response guidance above.
0	The bidder's response has not fully addressed any of the 4 component parts (a to d) of the response guidance above. OR A response has not been provided to this question.

B2 - Social Value (All Lots)

B2 Requirement:

You are required to demonstrate how you will deliver environmental benefits to customers and the wider community through your provision of services under the framework agreement, in support of the Fighting Climate Change theme, in accordance with section 16 (Social Value) of Attachment 1a - Framework Schedule 1a (Specification).

B2 Response guidance

All bidders must answer this question.

You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement and the question associated with the requirement, your response must:

- a) Demonstrate how you will deliver additional environmental benefits through this framework agreement, to support the achievement of Carbon Net Zero by 2050. Areas of focus within your own organisation may include, but is not limited to, the use of plastics, fleet operations, energy use and management and waste management.
- b) Demonstrate how you will influence and support your staff, flexible workers and customers to contribute towards environmental sustainability initiatives whilst delivering against this framework agreement. This may include, but is not limited to, educating staff in terms of their own personal capacity to contribute to net zero initiatives, community voluntary activities and working with your supply chains to reduce carbon production as well as customer focused initiatives.
- c) Demonstrate how you will work with communities to support environmental protection and improvement whilst delivering against this framework agreement. This may include, but is not limited to, engaging with local authorities and the voluntary sector in projects focusing on greening the environment, litter picking, waterways maintenance and encouraging local population involvement.

Your response should be limited to, and focused on, each of the component parts of the question posed (a to c). You must not make generalised statements or give irrelevant information.

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 – 6000 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 boxes 2.3.3, 2.3.4 and 2.3.5, each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking Scheme 100/66/33/0

Marking scheme	Evaluation criteria
100	The bidder's response fully addresses all 3 of the component parts (a to c) of the response guidance above.
66	The bidder's response fully addresses 2 of the 3 component parts (a to c) of the response guidance above.
33	The bidder's response fully addresses 1 of the 3 component parts (a to c) of the response guidance above.
0	<p>The bidder's response has not fully addressed any of the 3 component parts (a to c) of the response guidance above.</p> <p>OR</p> <p>A response has not been provided to this question.</p>

B3 - Customer Service and Support (All Lots)

B3 Requirement:

We require you to demonstrate how you will provide the Buyer's employees with access to a customer services team that will successfully manage and resolve customer and employee queries.

B3 Response guidance

All bidders must answer this question.

You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement, your response must:

- a) Demonstrate how you will approach employee contact and ensure that all Buyer employee queries and questions regarding the schemes or benefits you provide will be answered in an efficient and timely manner, to the satisfaction of the employee, via a dedicated customer services team. Your response must include your timescales for query resolution.
- b) Set out the complaint resolution process you will use, including how you will log, investigate, manage, escalate and resolve complaints raised by Buyers and their employees. Your response must demonstrate how your approach will provide quality customer service and successfully resolve complaints to the satisfaction of the Buyer in line with the SLA for complaint resolution set out at paragraph 17.1.3 of Attachment 1a - Framework Schedule 1 (Specification)

- c) Set out how you will measure the performance of the customer service you provide, including how you will identify performance issues and improvement areas, and how this information will be presented to the Buyer at review meetings. Your response must demonstrate how your approach will ensure you maintain a quality level of customer service and successfully address any performance issues.

Your response should be limited to, and focused on, each of the component parts of the question posed (a to c). You must not make generalised statements or give irrelevant information.

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 – 6000 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 boxes 2.4.3, 2.4.4 and 2.4.5, each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking Scheme 100/66/33/0

Marking scheme	Evaluation criteria
100	The bidder's response fully addresses all 3 of the component parts (a to c) of the response guidance above.
66	The bidder's response fully addresses 2 of the 3 component parts (a to c) of the response guidance above.
33	The bidder's response fully addresses 1 of the 3 component parts (a to c) of the response guidance above.
0	The bidder's response has not fully addressed any of the 3 component parts (a to c) of the response guidance above. OR A response has not been provided to this question.

Section C – Lot 1 Quality Questions (Lot 1 only)

C1 - Online Employee and Benefits Platform (Lot 1 only)

C1 Requirement:

We require you to demonstrate how you will provide a centrally branded Online Employee Benefits Platform that reflects each Buyer's individual identity and that is configured to provide each Buyer with access to the benefits that are included in their Call-Off Contract.

C1 Response guidance

You must answer this question if you are bidding for Lot 1.

You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement, your response must:

- a) Demonstrate how you will maintain the online platform so that it is accessible 24 hours a day all year round, including how you will ensure that you implement any improvements or upgrades to the system with minimal loss of service to the customer, in accordance with section 3 of Attachment 1a - Framework Schedule 1 (Specification).
- b) Demonstrate how you will deliver a secure, single sign on functionality to enable the Buyer's employees to access to all of their benefits and how the service will be closely integrated with the Buyer's intranet systems to ensure a simple, seamless journey for users, in accordance with section 3.2.1 of Attachment 1a - Framework Schedule 1 (Specification).
- c) Demonstrate how you will provide an interface with the Buyer's internal systems as required, as specified in the Buyer's Call-Off Contract, including the Buyer's HR/payroll systems, in accordance with section 14.1.4 of Attachment 1a - Framework Schedule 1 (Specification).
- d) Demonstrate how you will develop management information dashboards with Buyers that are available via the online platform, including how this approach will meet Buyer requirements in accordance with section 18.16.3 of Attachment 1a - Framework Schedule 1 (Specification).

Your response should be limited to, and focused on, each of the component parts of the question posed (a to d). You must not make generalised statements or give irrelevant information.

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. 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 boxes 2.5.3, 2.5.4, 2.5.5 and 2.5.6, each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking scheme 100/75/50/25/0

Marking scheme	Evaluation criteria
100	The bidder's response fully addresses all 4 of the component parts (a to d) of the response guidance above.
75	The bidder's response fully addresses 3 of the 4 component parts (a to d) of the response guidance above.
50	The bidder's response fully addresses 2 of the 4 component parts (a to d) of the response guidance above.
25	The bidder's response fully addresses 1 of the 4 component parts (a to d) of the response guidance above.
0	The bidder's response has not fully addressed any of the 4 component parts (a to d) of the response guidance above. OR A response has not been provided to this question.

C2 - Provision of Mandatory Products and Services (Lot 1 only)

C2 Requirement:

Lot 1 – Provision of all Products and Services

We require you to demonstrate how you will ensure the continuous availability of all products and services to Buyers throughout the duration of the Framework and any Call Off Contracts as part of a Managed Service, as set out in Framework Schedule 1 (Specification).

C2 Response guidance

You must answer this question if you are bidding for Lot 1.

You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement, your response must:

- a) Demonstrate how you will ensure that you continuously fulfil the requirement to supply all of the products and services set out in Attachment 1a - Framework Schedule 1 (Specification), including how you will effectively manage and mitigate any supply risks to ensure the Buyer always has access to all products and services.
- b) Demonstrate how you will deliver a comprehensive, simple to operate Cycle to Work Scheme, as set out in section 6.3 of Attachment 1a - Framework Schedule 1 (Specification), how you will ensure compliance with the additional regulatory requirements for loans of over £1000 (as section 6.5.8 of Attachment 1a - Framework Schedule (Specification), and how you will successfully manage the return or transfer of ownership of cycles at the end of the hire period.
- c) Demonstrate how you will manage all relevant regulatory requirements for all schemes, as set out in Attachment 1a - Framework Schedule 1 (Specification), in their entirety to ensure the Buyer can offer the services seamlessly to their employees without the need for the Buyer to undertake additional administrative work.

Your response should be limited to, and focused on, each of the component parts of the question posed (a to c). You must not make generalised statements or give irrelevant information.

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 – 6000 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 boxes 2.6.3, 2.6.4 and 2.6.4, each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking scheme 100/66/33/0

**Marking
scheme**

Evaluation criteria

100	The bidder's response fully addresses all 3 of the component parts (a to c) of the response guidance above.
66	The bidder's response fully addresses 2 of the 3 component parts (a to c) of the response guidance above.
33	The bidder's response fully addresses 1 of the 3 component parts (a to c) of the response guidance above.
0	The bidder's response has not fully addressed any of the 3 component parts (a to c) of the response guidance above. OR A response has not been provided to this question.

C3 - Employee Discount Scheme (Lot 1 only)

C3 Requirement:

We require you to demonstrate how you will provide a fully automated and comprehensive Employee Discount Scheme

C3 Response guidance

You must answer this question if you are bidding for Lot 1.

You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement, your response must:

- a) Demonstrate how you will ensure a sustainable and wide range of established, branded products are available at attractive discounted rates, allowing the Buyer's employees to take advantage of discounts on an extensive range of goods and services, in accordance with section 4.2.3 of Attachment 1a - Framework Schedule 1 (Specification).
- b) Demonstrate how you will operate a cashback scheme that will ensure cashback savings can be seamlessly used by the Buyer's employees against purchases on the discount area of the Buyer's Online Benefits Platform or transferred into the employees' personal bank accounts at any time, in accordance with section 4.2.2 of Attachment 1a - Framework Schedule 1 (Specification).

- c) Demonstrate how you will ensure that the discounts you provide remain competitive compared with similar schemes, including your process for offering seasonal offers at intervals throughout the year, and how you will use comparison date effectively to demonstrate competitiveness of discounts at review meetings with the Buyer

Your response should be limited to, and focused on, each of the component parts of the question posed (a to c). You must not make generalised statements or give irrelevant information.

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 – 6000 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 boxes 2.7.3, 2.7.4 and 2.7.5, each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking scheme 100/66/33/0

Marking scheme	Evaluation criteria
100	The bidder's response fully addresses all 3 of the component parts (a to c) of the response guidance above.
66	The bidder's response fully addresses 2 of the 3 component parts (a to c) of the response guidance above.
33	The bidder's response fully addresses 1 of the 3 component parts (a to c) of the response guidance above.
0	The bidder's response has not fully addressed any of the 3 component parts (a to c) of the response guidance above. OR A response has not been provided to this question.

Section D - Lots 2 – 6 Quality Question (Lots 2 – 6 only)

D1 – Integration of Products and/or Services

D1 Requirement:

We require you to demonstrate how you will ensure the successful integration (i.e. without disruption to the Buyer's user base) of the products and/or services into a Buyer's existing online benefits platform.

D1 Response guidance

You must answer this question if you are bidding for any or all of Lots 2 – 6.

You must insert your response into the text fields in the eSourcing suite.

In order to satisfy the requirement, your response must:

- a) Demonstrate how you will gain a clear understanding of the Buyer's existing online benefits platform and the scope of services they require from you to ensure that both Buyers and Users have easy access to agreed benefits and services. Your response must demonstrate how you will ensure you understand the Buyer's existing platform and how you will successfully integrate any agreed benefits and services to ensure a seamless access for Buyers' staff.
- b) Set how you will work with the Buyer and any incumbent supplier to implement and mobilise the services, including how you will identify, manage and resolve any issues. Your response must demonstrate how your approach will ensure successful mobilisation with no disruption to Buyer's employees' access to the benefits and services.
- c) Demonstrate how you will communicate effectively with the Buyer and any incumbent suppliers during the mobilisation period to ensure the successful implementation of the benefits and services.
- d) Demonstrate how you will ensure risks to the implementation and mobilisation of the services are successfully identified, managed and mitigated effectively so that you deliver the implementation and mobilisation of the services to the timetable agreed with the Buyer.

Your response should be limited to, and focused on, each of the component parts of the question posed (a to d). You must not make generalised statements or give irrelevant information.

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 – 8000 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 boxes 2.8.3, 2.8.4, 2.8.5 and 2.8.6, each box has a character count of 2,000 characters.

If you receive a mark of 0 (zero) for this question your bid will fail and will be excluded from the competition.

Marking scheme 100/75/50/25/0

Marking scheme	Evaluation criteria
100	The bidder's response fully addresses all 4 of the component parts (a to d) of the response guidance above.
75	The bidder's response fully addresses 3 of the 4 component parts (a to d) of the response guidance above.
50	The bidder's response fully addresses 2 of the 4 component parts (a to d) of the response guidance above.
25	The bidder's response fully addresses 1 of the 4 component parts (a to d) of the response guidance above.
0	The bidder's response has not fully addressed any of the 4 component parts (a to d) of the response guidance above. OR A response has not been provided to this question.

11. Price evaluation

This paragraph contains information on how to complete the applicable Attachment 3 - Pricing Matrix in each Lot and the price evaluation process.

11.1 How to complete your Pricing Matrix in each Lot

Read and understand the instructions in this section, and within the applicable Attachment 3 – Pricing Matrix, before submitting your prices.

You must download and complete the applicable Attachment 3 – Pricing Matrix. You must not alter, amend or change the format or structure of the pricing matrix.

You must submit all of the required information and pricing within the applicable Attachment 3 – Pricing Matrix. You must submit your company details on the “Company Details” tab for each applicable Lot. You must submit a price in every YELLOW cell and complete the ORANGE cells with the percentage breakdown of every price you submit.

The ORANGE cells are for the "Cost Component Breakdown" tables, and must be completed. They will form part of Framework Schedule 3 – Framework Prices to ensure price transparency and to assist verification of value for money in provision of the services. The "Cost Component Breakdown" cells highlighted ORANGE must include a detailed breakdown of your total costs in percentage terms for each service cost you are submitting a price for.

In Lot 1 you must complete the YELLOW and ORANGE cells in the following tabs:

- “Benefits Platform and Service Man”
- “Salary Sacrifice Schemes”
- “Employee Discounts”
- “Payroll Giving”
- “Reward & Recognition”
- “Financial Wellbeing” (Please note that the price you submit in cell B12 will not be used in the evaluation but must be submitted)

In Lots 2 – 6 you must complete the YELLOW and ORANGE cells in the following tabs:

- Lot 2 – “Lot 2 Reward & Recognition”
- Lot 3 – “Lot 3 Financial Wellbeing”
- Lot 4 – “Lot 4 Cycle to Work”
- Lot 5 – “Lot 5 Childcare Payroll Giving”
- Lot 6 – “Lot 6 Technology and Smartphone”

Every price you submit (except cell B12 in the “Financial Wellbeing” tab in Lot 1) will be multiplied by the volume and weighting set out in the applicable Pricing Matrix to give a “Weighed Cost” for that price component. Every “Weighted Cost” will be added together to give a “Total Weighted Cost” for every price component within each applicable tab. Each “Total Weighted Cost” will be added together to give an “Overall Total Weighted Cost”. The “Overall Total Weighted Cost” will be used in the price evaluation.

The “Overall Total Weighted Cost” is set out as follows in each Lot:

- Lot 1 – within cell D15 in the “Summary Sheet” tab
- Lot 2 – within cell E38 in the “Lot 2 Reward & Recognition” tab
- Lot 3 – within cell E42 in the “Lot 3 Financial Wellbeing” tab

- Lot 4 – within cell F34 in the “Lot 4 Cycle to Work” tab
- Lot 5 – within cell E40 in the “Lot 5 Childcare Payroll Giving” tab
- Lot 6 – within cell F35 in the “Lot 6 Technology and Smartphone” tab

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

Your submitted prices must:

- exclude VAT.
- be in British pounds sterling (£), up to two decimal places

You should take into account our management charge of 1% which shall be paid by you to us, as set out in the Framework Award Form (within Attachment 10 – Framework Contract Documents).

The prices submitted will be the maximum prices payable by Buyers under this Framework. Prices may be lowered at the Call-Off stage. Please review Framework Schedule 3 – Framework Prices (within Attachment 10 – Framework Contract Documents).

In each Lot, when you have completed your Pricing Matrix, you must upload it on the eSourcing suite to the applicable question in the commercial envelope. Please refer to the table at section 8.1 of this document for details of which question you must upload each Pricing Matrix to.

If you do not fully complete the Pricing Matrix, or if you fail to upload it, your bid will be non-compliant and may be rejected from the competition

You are permitted to submit a zero bid (£0.00) for any price component. However, please refer to section 11.3 (Abnormally low bids) in this document.

11.2 Price evaluation process

In each Lot, the price weighting is 20%. The maximum Price Score available is 20.

In each Lot, the bidder that has the lowest “Overall Total Weighted Cost” will be awarded the maximum Price Score of 20. All other bidders will be awarded a score that is relative to the lowest “Overall Total Weighted Cost” submitted.

In each Lot, the calculation we will use is as follows:

$$\text{Price Score} = \frac{\text{Lowest Overall Total Weighted Cost}}{\text{Bidder's Overall Total Weighted Cost}} \times 20$$

This is illustrated in the example below (figures are for example purposes only):

Bidder A Overall Total Weighted Cost	Bidder B Overall Total Weighted Cost	Bidder C Overall Total Weighted Cost
£50,000	£100,000	£200,000

Using the calculation set out above:

- Bidder A has the lowest Overall Total Weighted Cost of £50,000 and receives maximum available Price Score of 20.
- Bidder B has a line item price of £100,000 and receives a Price Score of 10.
- Bidder C has a line item price of £200,000 and receives a Price Score of 5.

When the price evaluation has been completed, each bidder will have a Price Score out of 20.

11.3 Abnormally low bids

If we consider that the prices you have submitted are potentially abnormally low we will ask you to explain your prices (in accordance with 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

In each Lot, we will add your Quality Score to your Price Score to calculate your Final Score.

Example:

Bidder	Quality score	Price score	Final score
	(Maximum score available 80)	(Maximum score available 20)	(Maximum score available 100)
Bidder A	70.00	15.00	85.00
Bidder B	55.00	20.00	75.00
Bidder C	50.00	10.00	60.00

We will then rank all Final Scores from highest to lowest.

In each Lot, we will offer a Framework Contract to the highest ranked number of bidders that corresponds to the number of places in the lot, as set out in the table at section 3 of Attachment 1 – About the Framework.

So that:

- In Lots 1, 2 and 3, the 6 highest ranked bidders in each Lot will be offered a Framework Contract.
- In Lots 4 and 5, the 4 highest ranked bidders in each Lot will be offered a Framework Contract.
- In Lot 6, the 5 highest ranked bidders will be offered a Framework Contract.

In each Lot, the maximum number of awarded bidders may increase where two (2) or more bidders have tied scores in the last awarded position only.

12.2 Reserved rights

The last awarded position in a Lot is 5th position.

The bidder in 5th place has a Final Score of 60.00

The calculation we will use is:

5th place bidder's final score is 60.00

1% of 60.00 = 0.60

The calculation will be rounded to two decimal places.

60.00 - 0.60 = 59.40

Any bidder that has a Final Score of 59.40 or above will be awarded a place on the Framework in the applicable Lot.

12.3 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. those bidders that 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.

If during standstill we do receive a substantive challenge to our decision to award, and the challenge is for a certain Lot, we reserve the right to conclude a Framework Contract with successful bidders for the Lot(s) that have not been challenged.

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.

12.4 Framework Contract

You must sign and return the Framework Contract within 10 calendar 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.

If you have bid as a consortium, the conclusion of a Framework Contract is subject to the provision of due 'certificates, statements and other means of proof' from EACH member of the consortium.

This means:

- Cyber Essentials Certificate
- ISO27001 Certificate
- Employer's (Compulsory) Liability Insurance = £10,000,000
- Public Liability Insurance = £1,000,000
- Professional Indemnity Insurance = £1,000,000

You are required to send the documentary evidence of the above to no later than the date provided in the Intention to Award letter. Failure to do so may result in our offer of a Framework Contract being withdrawn.