

WSHFT Trust

ITT Evaluation Manual

Procurement of Retail Catering Services

Document 3

1st July 2016

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General Information

Introduction

- The contract period will be awarded for a period of ten years, with a break clause at the end of year 5
- The procurement is being carried out in accordance with the Public Contracts Regulations 2006 utilising the European Restricted procedures.

Purpose of the Evaluation Manual

This manual sets out the process for submission of the Bidder responses and the evaluation process which will be adopted by Western Sussex NHS Foundation Trust in evaluating the ITT Bidder responses.

Evaluation Objectives

The objective of the evaluation process is to identify the Preferred Bidder or Preferred Bidders that provide the Trust with overall best overall value for money to deliver the range of catering services. Bidders will be able to apply for either Lot 1, Lot 2, Lot 3 or all (or a combination) of the described Lots.

The evaluation of the Tender submissions will ensure:

- Equality of treatment of all Bidders;
- A clear and transparent auditable trail; and
- Selection of a Preferred Bidder (or Preferred Bidders) that provides the Trust with the best overall value for money.

Timetable for Evaluation

DATES	EVENT
4th July 2016	OJEU Notice Issued
18th July 2016	Deadline for expressions of interest
18th July 2016	Invitation to Tender issued
22nd July 2016	Bidders Day & Trust Presentation
19th July – 16th August 2016	Tender Period
16th August 2016	Closing Date for Submissions for Tender
17th August – 21st August 2016	Tender Evaluation & Shortlisting for Presentation
22nd August 2016	Shortlisted Bidder Presentations & Staff Engagement Session
23rd August 2016 – 30th August 2016	Presentation Evaluation Period
31st August 2016	Recommended Bidder to Trust Board
1st – 14th September 2016	Alcatel Period
15th September 2016	Contract Award
1st November 2016	Contract Commencement

Evaluation Team Membership

The Project Board Evaluation Team responsible for evaluating the submissions will comprise of:

- Director of Estates, Facilities & Capital (Project Lead)
- Associate Director of Facilities
- Head of Catering Services
- Deputy Finance Director
- Deputy Director of HR
- Staff Side Representative
- Governor Representative
- Company Secretary

The Evaluation Process

Stage 1 – Document Check

Before the start of the ITT evaluation a check will be undertaken of each Bidder to ensure that the Tender is compliant and is in accordance with the instructions outlined in the Invitation To Tender documents.

Stage 2 – Evaluation

The Evaluation will be undertaken of the quality and the price, as separate elements:

- ① Criterion 1- Financial accounting for 40% of the evaluation; and
- ① Criterion 2- Technical & HR accounting for 45 % of the evaluation.

Document 2, outlines how the Tender Responses to the Tender questions for each Lot will be scored and evaluated against these criteria.

The Tender Response Requirements (Document 2) will be used for the Technical and HR Criterion Evaluation and the Pricing Schedule (Document 4) for the Financial Evaluation.

Evaluation Team members will undertake individual evaluation of the quality elements of the Tender submissions, they will then attend an Evaluation moderation meeting where each of the bids will be discussed and a consensus score agreed for each element of the submission. The consensus scores agreed at the Tender evaluation team moderation meeting will be combined with the Financial Evaluation to provide the basis of the overall outcomes of the Tender Evaluation process

Stage 3 – Presentation and Financial Clarification

A shortlist of two (2) bidders will be drawn up, based on the evaluation of Criterion 1 & Criterion 2. It is anticipated that the top two bids from either Lot 1 or Lot 2&3 will be invited to present.

The trust will reserve the right to invite any bidders with a stage 2 sum of criterion 1&2 that is within 5 percentage points of the shortlisted bidders.

All shortlisted Bidders will be invited to give a presentation of their tender proposals to the evaluation. The presentation will be used to confirm understanding of the tender submission and raise any final clarification issues in respect of the Tender Questions.

The presentations will be marked and will make up the remaining 15% of the points available.

Stage 4 - Documenting the Decision

Following the presentations and financial clarifications the evaluation team will meet to confirm the final scores for each of the Bidders and identify the Bidder(s) whose submission provides the best overall value for money and the selection of the Preferred Bidder(s). The outcomes of this meeting will be recorded and will form the basis of the Tender Evaluation Report.

The Tender Evaluation report will be submitted to Project Board for review, comment and approval and submission to the Trust Board of Directors for approval of the selected Preferred Bidder.

Notifying the Successful & Unsuccessful Bidders

Following approval by the Western Sussex NHS Foundation Trust Board, the Preferred Bidder or Preferred Bidders (as the case may be) will be notified that they have been awarded the Service Contract or Service Contracts. The unsuccessful Bidders will be advised of the decision and the Alcatel 10 day period will commence. Unsuccessful Bidders will be provided with the reasons for non-selection and details of the scores achieved in accordance with information requirements under the Public Contracts Regulations 2006.

Conflicts of Interest

If there is any evidence to suggest there may be a conflict of interest, Project Board will be advised and will decide if the conflict is material and may exclude the individual from the evaluation process if deemed necessary.

Confidentiality

As a pre-requisite to undertaking the evaluation of the Bidder submissions, evaluators are agreed to treat all information received as Commercial and in Confidence.

Qualitative Tender Evaluation and Scoring Protocol

Introduction

This section provides instructions to all members of the Tender Evaluation Team on the responsibilities for scoring specific elements of the evaluation and scoring of the submissions.

The Tender Evaluation Team members must at all times ensure that their evaluation of the Tender submissions is conducted in accordance with the principles set out within the Tender Evaluation Manual

Documentation

The technical Tender submissions will be made available to Evaluation Team members both electronically (via memory stick) and hard copy. These are to be sent to the Trust no later than midday on the day of closing. It is the responsibility of the bidder to ensure that the bid documentation has arrived with the Trust before the aforementioned deadline.

Evaluation of Bids

Tender Evaluation Team members must ensure that in assessing each Tender submission that they do so applying all elements of the evaluation criteria. Team members must not take into account any historical knowledge or other information received outside of this evaluation process as this may result in legal challenge.

Scores of the tender submissions are required to be recorded on the tender scoring matrix.

Evaluation Scoring – Legal

The Trust’s Legal advisors, Capsticks, will provide support and advice in the Evaluation of the Legal response

Evaluation Scoring – Financial/Commercial

The Commercial element of the evaluation will be based on Question 1.1 (Lot 1 and Lot 3 and Question 1.2 (Lot 2) of Document 4 (Part One), as well as the Pricing Schedules of Document 4, Part 2. The financial assessment will be undertaken by the Trust’s Finance Evaluation Team.

Financial Offer

Scores will be derived for Lot 1,2 & 3 based on the total guarantee level of income for the full ten (10) year term (35%) and proposed additional income to the Trust from trading activities above the guaranteed income (5%).

Scoring will be individually assessed for both guaranteed and additional income.

Bidders are asked to provide supporting evidence (i.e. Business Plan) to demonstrate cost certainty and credible income levels that are viable and sustainable.

The proposed additional income levels will be risk adjusted in accordance with the following table;

Definition	Risk Adjustment
Very high degree of confidence of delivery	100%
Strong possibility but with some risks to delivery	75%
Moderate possibility but sound basis	50%
Slight Possibility and sound basis	25%
Pure speculation with no supporting evidence	0%

When the guaranteed and additional income of the highest Bidder has been established, the total will be converted to a percentage, the highest value will be awarded 100%. All other Bidders will be scored against the highest score, based on how far they are from that threshold score.

Bidders must provide **one Pricing Schedules for each lot** which must be AfC (TUPE Liability) and living wage compliant.

Evaluation Scoring – Technical

The Technical and Human Resources evaluation will be undertaken by the Project Board Evaluation Team

Scoring Criteria:

Score	Acceptability	Description
0	Unacceptable	Does not meet the requirement in any or most respects. Does not comply and/or insufficient information provided to demonstrate that the Bidder has the ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services, with little or no evidence to support the response
1	Fair	Satisfies the requirement but with minor reservations. Some minor reservations of the Bidder's relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services, with limited evidence to support the response.
2	Satisfactory	Satisfies the requirement. Reasonable demonstration by the Bidder of the relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services, with evidence to support the response
3	Good	Satisfies the requirement. Above average demonstration by the Bidder of the relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services. Response (where called for) identifies factors that will offer good potential added value.
4	Excellent	Fully meets the requirement. Exceptional demonstration by the Bidder of the relevant ability, understanding, experience, skills, resources & quality measures required to provide the supplies / services. Response (where called for) identifies factors that will offer exceptional potential added value