



## 1 INTRODUCTION

- 1.1 This document provides an overview of the methodology which will be adopted by the Authority and its Agent to evaluate Potential Provider responses to each question set out within the e-Sourcing event. It also sets out the marking scheme which will apply.
- 1.2 The following information has been provided in relation to each question (where applicable):
- 1.2.1 Weighting – highlights the relative importance of the question;
  - 1.2.2 Guidance – sets out information for the Potential Providers to consider; and
  - 1.2.3 Marking Scheme – details the marks available to evaluators during evaluation.
- 1.3 The defined terms used in the ITT document shall apply to this document.

## 2 OVERVIEW

- 2.1 The e-Sourcing event is broken down into the following Questionnaires:

| Questionnaire Reference | Questionnaire Title            |
|-------------------------|--------------------------------|
| 1                       | KEY PARTICIPATION REQUIREMENTS |
| 2                       | CONFLICTS OF INTEREST          |
| 3                       | INFORMATION ONLY               |
| 4                       | SUPPLIER EXPERIENCE            |
| 5                       | QUALITY                        |
| 6                       | SERVICE DELIVERY               |
| 7                       | PRICE                          |
| <b>STAGE TWO</b>        |                                |
| 8                       | PRESENTATIONS                  |

### 2.2 Quality Evaluation Process

- 2.2.1 The evaluation of each response to the Quality/Service Delivery Questionnaire(s) will be conducted and consensus checked in accordance with the Consensus Marking Procedure set out in paragraph 2.3 below.
- 2.2.2 Each response to questions within the Quality/Service Delivery Questionnaire(s) will be marked in accordance with the table below:



| Mark | Comment   |
|------|---|
| 0    | Failed to provide confidence that the proposal will meet the requirements. An unacceptable response with serious reservations.  |
| 25   | A Poor response with reservations. The response lacks convincing detail with risk that the proposal will not be successful in meeting all the requirements.                                   |
| 50   | Meets the requirements – the response generally meets the requirements, but lacks sufficient detail to warrant a higher mark.   |
| 75   | A Good response that meets the requirements with good supporting evidence. Demonstrates good understanding.   |
| 100  | An Excellent comprehensive response that meets the requirements. Indicates an excellent response with detailed supporting evidence and no weaknesses resulting in a high level of confidence. |

2.2.3 Each mark achieved will be multiplied by the corresponding weighting to provide an overall question score.

2.2.4 When the score for each question has been determined they will be added together to provide an overall score for the Quality Evaluation (“Quality Score”).

## 2.3 Consensus Marking Procedure

2.3.1 Tenders that are scored and require evaluation will be evaluated in accordance with the procedure described in this paragraph.

2.3.2 The Consensus Marking Procedure is a two-step process, comprising of:

- 2.3.2.1 Independent evaluation; and
- 2.3.2.2 Group consensus marking.

2.3.3 During the independent evaluation process, each evaluator will separately (i.e. without conferring with other evaluators) scrutinise the quality of answers given by Potential Providers in their Tender. Each evaluator will then allocate a mark for the answer in accordance with the Marking Scheme applicable to that question.

2.3.4 The Agent will review the marks allocated by the individual evaluators before facilitating a group consensus marking meeting.

2.3.5 During the meeting, the evaluators will discuss the independent marks until they reach a consensus regarding the marks that should be attributed to each Potential Providers’ answer to the questions.

2.3.6 Once all quality responses have been evaluated in accordance with Section 8 of the Invitation to Tender the individual scores attributed to each response will be added together to provide a ‘Quality Score’.

## 2.4 Price Evaluation Process



2.4.1 Prices submitted by Potential Providers in Appendix E Pricing Schedule/ for those Lots tendered for will be recorded and evaluated in accordance with the following process.

2.4.2 Potential Providers' are required to submit a price in Appendix E for those Lots tendered for within the e-Sourcing event.

2.4.3 Prices offered will be evaluated against the range of prices submitted by all Potential Providers.

2.4.4 The Potential Provider with the lowest price in each Lot shall be awarded the Maximum Score Available. The remaining Potential Providers shall be awarded a percentage of the Maximum Score Available equal to their price, relative to the lowest price submitted.

2.4.5 The calculation used is the following:

$$2.4.6 = \frac{\text{Lowest Price Tendered}}{\text{Tender price}} \times \text{Maximum Score Available}$$

| Potential Provider   | Price Submitted | Score Calculation     | Maximum Score Available | Score Awarded |
|----------------------|-----------------|-----------------------|-------------------------|---------------|
| Potential Provider A | £1,000          | £1,000/£1,000<br>*100 | 100                     | 100           |
| Potential Provider B | £2,000          | £1,000/£2,000<br>*100 | 100                     | 50            |
| Potential Provider C | £2,500          | £1,000/£2,500<br>*100 | 100                     | 40            |

2.4.7 The 3 highest ranked Potential Providers, who achieve the minimum acceptable Total Score of 75% will be invited for a presentation. The Authority reserves the right to select more or fewer bids depending upon the market response.

### 3 EVALUATION CRITERIA

3.1 A summary of all the questions contained within the e-Sourcing event, along with; the minimum acceptable score, maximum score available and weighting (where applicable) are set out below:

3.2 Questionnaires 1 and 2 contain 'Pass/Fail' questions and act as a doorway for progression to the following stages of the evaluation. Potential Providers are strongly advised to read and understand the specific guidance provided before responding to these questionnaires.

3.3 Questionnaire 3 is for information only. Although this questionnaire does not form part of the evaluation process, Potential Providers are advised to complete it in full as any omissions could affect the award process.

3.4 The Authority and its Agent reserve the right to challenge any information provided in response to Questionnaire 3 and request further information in support of any statements made therein.



| <b>QUESTIONNAIRE 1 – KEY PARTICIPATION REQUIREMENTS</b> |   |                  |                      |
|---|---|------------------|----------------------|
| <b>GUIDANCE</b>   | The following questions are 'Pass/Fail' questions. If Potential Providers are unwilling or unable to answer "Yes", their submission will be deemed non-compliant and shall be rejected. Potential Providers should confirm their answer by selecting the appropriate option from the drop down menu.  |                  |                      |
| <b>Question Number</b>                                  | <b>Question</b>   | <b>Max Score</b> | <b>Weighting (%)</b> |
| 1.1   | Have you read, understood and agree with Appendix A, Terms of Participation? By answering "Yes", you are confirming your 'Declaration of Compliance' at Annex 1 of Appendix A, Terms of Participation.  | Pass/Fail        | N/A                  |
| 1.2   | Have you read, understood and accepted the Invitation to Tender and all associated appendices, specifically Appendix B, Statement of Requirement?   | Pass/Fail        | N/A                  |
| 1.3   | Do you agree, without caveats or limitations, that in the event that you are successful the Authority's Terms and Conditions within Appendix C, Draft Contract Document will govern the provision of this contract?   | Pass/Fail        | N/A                  |
| 1.4   | Do you confirm your Organisation's e-Sourcing suite profile is complete and accurate at the time of Tendering and that any amendments made following acceptance of this event will be notified to the buyer in writing.   | Pass/Fail        | N/A                  |
| 1.5   | Do you confirm that you can attend regular face-to-face meetings on-site at HMT (e.g. regular could mean two meetings per week for LOT 1 during the intensive design period)  | Pass/Fail        | N/A                  |
|   |   |                  |                      |
| <b>QUESTIONNAIRE 2 – CONFLICTS OF INTEREST</b>          |   |                  |                      |
| <b>GUIDANCE</b>   | Question 2.1 is a 'Yes/No' question and will dictate whether or not question 2.2 needs to be answered.<br>Question 2.2 is a Pass / Fail question. Potential Providers are required to provide details of how the identified conflict will be mitigated. The Contracting Authority will review the mitigation in line with the perceived conflict of interest, to determine what level of risk this poses to them. Therefore if Potential Providers cannot or are unwilling to suitably demonstrate that they have suitable safeguards to mitigate any risk then their Tender will be deemed non-compliant and will be rejected. |                  |                      |
| <b>Question Number</b>                                  | <b>Question</b>   | <b>Max Score</b> | <b>Weighting (%)</b> |
| 2.1   | Please confirm whether you have any potential, actual or perceived conflicts of interest that may be relevant to this requirement.  | None             | N/A                  |



|     |   |           |     |
|-----|---|-----------|-----|
| 2.2 | We require that any potential, actual or perceived conflicts of interest in respect of this ITT are identified in writing and that companies outline what safeguards would be put in place to mitigate the risk of actual or perceived conflicts arising during the delivery of these services. | Pass/Fail | N/A |
|-----|---|-----------|-----|

### QUESTIONNAIRE 3 – INFORMATION ONLY

| <b>GUIDANCE</b> | The following questions are for information only and do not form part of the evaluation. Information provided in response to these questions may be used in preparation of any Contract Award and any omissions may delay completion of this Tender exercise.  |           |               |
|-----------------|--|-----------|---------------|
| Question Number | Question   | Max Score | Weighting (%) |
| 3.1             | Please provide the name, office address, telephone number and email address for your organisations Tender point of contract.   | None      | N/A           |
| 3.2             | Please confirm whether your organisation is an SME as defined within <a href="#">EU recommendation 2003/361</a>  | None      | N/A           |
| 3.3             | Please provide details of any sub-contractors you propose to use in order to meet your obligations should you be awarded a Contract. Your response must include their: <ul style="list-style-type: none"> <li>• Trading Name(s)</li> <li>• Registered Address(es) and contact details</li> <li>• Goods/Services to be provided</li> </ul>  | None      | N/A           |
| 3.4             | If you are the Lead contact for a Group of Economic Operators, please provide details of all the members of the Group. Your response must include their: <ul style="list-style-type: none"> <li>• Trading Names(s)</li> <li>• Registered address(es)</li> <li>• Dunns Number(s)</li> <li>• Role/responsibility within the Group</li> </ul> | None      | N/A           |
| 3.5             | With reference to paragraph 2.3 within the ITT, Potential Providers tendering for more than one (1) Lot should list those Lots in 'Order of Preference'. The information provided will be used at the point of award where restrictions to the number of Lots awarded apply.   | None      | N/A           |



- 3.5 The following Quality/Service Delivery Questionnaires are designed to test Potential Providers' ability to deliver the requirement as set out in Appendix B, Statement of Requirements. Potential Providers *MUST* answer all Quality/Service Delivery questions.
- 3.6 Potential Providers must achieve the minimum acceptable Quality Score, as described, for each of the questions below. Only those responses which achieve the minimum acceptable Quality Score will be included in the Price Evaluation Process.
- 3.7 Where only one (1) submission is received which does not meet the minimum acceptable Quality Score, the Authority reserves the right to enter into dialogue and seek assurances regarding the delivery of the requirement.
- 3.8 Potential Providers are able to provide attachments against each question. Question text fields must be populated with detailed references to relevant attachments or sections within their attachments.
- 3.9 Potential Providers' responses must clearly demonstrate how they propose to meet the requirements set out in the question and address each element in the order they are asked.
- 3.10 Potential Providers' responses should be limited to, and focused on each of the component parts of the question posed. They should refrain from making generalised statements and providing information not relevant to the topic.
- 3.11 Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas including identifying key sections within responses.
- 3.12 Potential providers will be marked in accordance with the marking scheme at Section 2.
- 3.13 As attachments are permitted, the maximum word count is 1000 words including titles and paragraph headings. This word count must not be exceeded and any text which is in excess of this limit shall be disregarded and shall not be considered in the evaluation process. The page limit on attachments is set at **2 pages**. Attachments may be submitted in Microsoft Word, Excel. PDF format and be in Arial font size 11.



| QUESTIONNAIRE 4 –SUPPLIER EXPERIENCE                            |   |                          | Weighting – 10%         |               |
|---|---|--------------------------|-------------------------|---------------|
| All Potential Providers MUST answer ALL the following questions |   |                          |                         |               |
| Question Number   | Question  | Minimum Acceptable Score | Maximum Available Score | Weighting 10% |
| 4.1   | Potential providers should set out a concise summary of their experience to date of delivering similar, co-designed programmes for similar customers, to similar time frames. They should provide details of three similar organisations from which the Authority can obtain references for LOT 1 & 2.  | 75                       | 100                     | 50%           |
| 4.2   | <p>Potential providers should provide details of the resources they are able to provide in order to deliver the programme on time. Please detail:</p> <ul style="list-style-type: none"> <li>- Who will make up your proposed team (include details of relevant experience and CVs which can be appended and will not be counted as part of the word limit)</li> <li>- Detail the amount of time each team member will be able to give to this project, and what % of their project portfolio this would form for LOTS 1 &amp; 2</li> <li>- What specific roles and responsibilities team members will have (please make it clear who will be designing, who will be facilitating sessions etc).</li> </ul> | 75                       | 100                     | 50%           |



| <b>QUESTIONNAIRE 5 – QUALITY</b>                                       |  |                          |                         | <b>Weighting – 20 %</b> |
|--|--|--------------------------|-------------------------|-------------------------|
| <b>All Potential Providers MUST answer ALL the following questions</b> |  |                          |                         |                         |
| Question Number  | Question   | Minimum Acceptable Score | Maximum Available Score | Weighting 20%           |
| 5.1  | Potential providers should detail the measures they propose for the management of quality.   | 75                       | 100                     | 33%                     |
| 5.2  | Potential providers should confirm what assessment and feedback mechanisms for the learner they see working for the programme, to ensure learning outcomes for each element of the programme are achieved and that learning is embedded. | 75                       | 100                     | 33%                     |
| 5.3  | Potential providers should confirm how they will ensure quality is maintained across all modules of the programme.   | 75                       | 100                     | 17%                     |
| 5.4  | Potential providers should provide details of where they think they can add most value for the Authority to achieve its objectives for the programme.  | 75                       | 100                     | 17%                     |

| <b>QUESTIONNAIRE 6 – SERVICE DELIVERY &amp; APPROACH</b>               |  |                          |                         | <b>Weighting – 20%</b> |
|--|--|--------------------------|-------------------------|------------------------|
| <b>All Potential Providers MUST answer ALL the following questions</b> |  |                          |                         |                        |
| Question Number  | Question   | Minimum Acceptable Score | Maximum Available Score | Weighting 20%          |
| 6.1  | Potential providers should detail their proposals for managing the project, and provide a risk register, detailing how risks will be managed. Planning charts can be appended to the bidder response if required and will not be included in the | 75                       | 100                     | 32%                    |

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|     | word count for responding to this question.   |     |     |     |
| 6.2 | Potential providers should detail how they will guarantee the continuity of the proposed personnel/resources throughout the life time of the project, including what commitment they can give that personnel will not be moved to alternative projects. Please provide details of additional support staff that could be drafted in and how these would be available should the need arise. | 75  | 100 | 17% |
| 6.3 | Potential providers should set out how they would approach working with a complex set of stakeholders (HMT staff, HR, potentially other suppliers), and give relevant examples of how they have successfully worked this way in the past.   | 75  | 100 | 17% |
| 6.4 | The winning supplier will have access to confidential information. Potential providers should provide details of the processes and procedures they have in place to ensure that confidentiality of data is achieved.  | 100 | 100 | 17% |
| 6.5 | Potential providers should detail relevant experience of sub-contracting suppliers in LOT 1 only.   | 75  | 100 | 17% |
| 6.6 | Potential providers should detail the specific ideas they have for tools, techniques and resources for the problem-framing module. Lot 2 only.  | 75  | 100 | 17% |



| <b>QUESTIONNAIRE 7 – PRICE</b> |  | <b>Weighting – 30%</b> |
|--------------------------------|--|------------------------|
| <b>GUIDANCE</b>                | <p>Potential Providers must enter costs for the Lot(s) Tendered for within Appendix E – Pricing Schedule and upload as an attachment on the e-Sourcing event. Please include your rate card as well as capped costs and outline fully any assumptions you make. Potential Providers should provide an assessment of how many days to 1) Design, 2) Programme manage and 3) Deliver this programme/module for LOTS 1 &amp; 2</p> <p>Prices should be submitted in pounds Sterling inclusive of any expenses but exclusive of VAT.</p> <p>Potential Providers will be marked in accordance with the marking scheme at Section 2.</p> |                        |
| Question Number                | Question   | Max Score              |
| 7.1                            | Please confirm, by selecting 'YES' that you attached a completed Price Schedule to the response to this question for the Lot(s) tendered for. In so doing, you are also confirming that prices offered are inclusive of any expenses, exclusive of VAT and firm for a period of 90 days following the Deadline for Submission.   | 100                    |

#### 4 STAGE TWO

| <b>QUESTIONNAIRE 8 – STAGE 2 PRESENTATIONS</b> |   |           | <b>Weighting – 20%</b> |
|--|---|-----------|------------------------|
| <b>GUIDANCE</b>                                | <p>Potential Providers will be asked to make a presentation on the areas listed below which will be scored in accordance with the table at 2.2.2 above:</p> |           |                        |
| Question Number                                | Question  | Max Score | Weighting (%)          |
| 8.1  | Programme Management and Design   | 100       | 40%                    |
| 8.2  | Facilitation/ delivery (we will want key facilitators present at the meeting)   | 100       | 30%                    |
| 8.3  | Maintaining quality and evaluation methods  | 100       | 20%                    |
| 8.4  | Previous experience   | 100       | 10%                    |