

**Spot Buy Team
Spot Buy Service Overview**



Crown
Commercial
Service

SPOT BUY EVALUTION GUIDANCE

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1. Purpose

- 1.1 This document is to provide guidance to evaluators during the evaluation stage of the Spot Buy process.

2. INTRODUCTION

- 2.1 In order to prepare for the evaluation stage of the Spot Buy process it is important to read this guidance document thoroughly and raise any questions you have with the team member assigned to lead on your Spot Buy before the evaluation commences.
- 2.2 This guidance intends to provide evaluators with full understanding of the evaluation process and what is required of them.
- 2.3 This document includes guidance on:
- 2.3.1 Evaluator Selection;
 - 2.3.2 Price Evaluation;
 - 2.3.3 Evaluation Stage;
 - 2.3.3.1 Question & Guidance;
 - 2.3.3.2 Marking Scheme; and
 - 2.3.3.3 Scores and Rationale;
 - 2.3.4 Consensus;
 - 2.3.5 Award

3. EVALUATOR SELECTION

- 3.1 During the initial stages of the Spot Buy process, the Spot Buy Team member who has been assigned to lead on your Spot Buy should have made you aware of the evaluation stage.
- 3.2 It is the responsibility of the customer to provide sufficient evaluation resource during the evaluation stage and it is important for the customer to select appropriate evaluators as early as possible to ensure their availability.
- 3.3 It is recommended by Crown Commercial Service that a total of three evaluators take part in the evaluation to ensure rigour during the evaluation process.
- 3.4 Evaluators should be selected based on their:
- 3.4.1 Technical expertise; and
 - 3.4.2 Good understanding of the requirement.
- 3.5 Once the evaluators have been selected, it is recommended that the final versions of the Statement of Requirements and the Response Guidance are shared with them at the earliest opportunity to ensure they have a thorough understanding of:

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- 3.5.1 The requirement and key deliverables:
 - 3.5.2 The evaluation criteria;
 - 3.5.3 The questions and guidance; and
 - 3.5.4 The marking scheme.
- 3.6 The Spot Buy team member will provide the registration link to the e-sourcing suite which each member of the panel should complete in order to obtain a log-on to the system.
- 3.7 Once the log-in details have been provided the spot buy team member should be informed so that the panel can be added to the event once it is closed.

4. RECEIVING TENDERS

- 4.1 It is often difficult to predict the number of tender responses, especially in large markets, e.g. ICT.
- 4.2 The number of tender responses will have a direct impact on the time required during the evaluation stage therefore it is important to ensure a sufficient amount of time has been set aside for each evaluator/evaluation.
- 4.3 The assigned Spot Buy Team member will send evaluators an Evaluation Template at the earliest opportunity following the tender submission deadline. A separate Evaluation Template should be used for each tender response received.
- 4.4 The Evaluation Template will be used by Evaluators to input scores and sufficient rationales for these scores for each tender response received.
- 4.5 The Spot Buy Team Member will add the evaluation panel to the event on the e-sourcing suite so that the tender responses can be viewed
- 4.6 If it has been decided that evaluators will evaluate individually, each evaluator should each be given an Evaluation Template for the tender responses.

5. PRICE EVALUATION

- 5.1 The assigned Spot Buy Team member at Crown Commercial Service will conduct the price evaluation and the evaluation of any mandatory questions that do not require qualitative evaluation.

6. EVALUATION STAGE

- 6.1 Once evaluators have received access to the e-sourcing suite all the tender responses that have been submitted can be viewed and the evaluation can commence..
- 6.2 It is imperative that all evaluators fully understand the evaluation criteria for each question that is evaluated, ensuring that the appropriate score is awarded in accordance with the marking scheme and that a sufficient rationale for this score is recorded in the Evaluation Template.

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6.2.1 Question and Question Guidance

6.2.1.1 Evaluators are to ensure that they understand what the question is asking and fully understand each component part of that question.

6.2.1.2 An example below highlights a typical question *Approach* and the individual requirements that must be covered by the potential provider (i – iv):

4 APPROACH	Weighting 30%
Guidance:	
The Authority wishes to assess the approach proposed by the Potential Provider in relation to the <i>Facilities Management Contract</i> .	
The Potential Provider should:	
<ul style="list-style-type: none"> i. Provide a detailed description of how the Potential Provider proposes to deliver the requirements of the <i>Facilities Management Contract</i>; ii. Provide a detailed description of the proposed implementation plan with key activities that will enable all key deliverables to be met; iii. Provide a detailed description of the Potential Provider's approach to quality; and iv. Explain how the Potential Provider will adhere to the set service levels outlined in Appendix B- Service Description. 	

6.2.1.3 A good understanding of the requirement and the key deliverable set out in Appendix B – Service Description is vital.

6.2.2 Marking Scheme

6.2.2.1 Once the evaluator has gained an understanding of the question and guidance, it is then recommended to read and understand the Marking Scheme associated with that particular question.

6.2.2.2 The example below provides the marking scheme associated with the example provided in 6.2.1.2:

Marking Scheme:	
The following marking scheme will be used to assess the response provided to this question:	
0	Failed to meet any aspect of the requirements. An unacceptable response with serious reservations.

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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.

6.2.3 Reviewing the Response

- 6.2.3.1 Once the evaluator has gained a full understanding of the question and the associated marking scheme, it is then recommended that the potential provider's response is reviewed.
- 6.2.3.2 Responses will be provided in the text box on the e-sourcing suite or via an attachment.
- 6.2.3.3 Evaluators can access the text box by reviewing the score sheet on the e-sourcing suite and selecting the specific question to be evaluated for each bidder.
- 6.2.3.4 Evaluators can go back to each question, marking scheme and/or response as many times as they like to ensure a full understanding.
- 6.2.3.5 Once reviewed, the evaluator should mark the response as per the marking scheme. It is vital that the marks and rationales provided are in line with the marking scheme.

6.2.4 Scores and Rationale

- 6.2.4.1 It is imperative that sufficient rationale is provided to justify the score awarded.
- 6.2.4.2 The rationale provided will be included in a Debrief Report contained within each outcome letter therefore it is important that it is constructive to help potential providers improve future bids.
- 6.2.4.3 All rationale should include details of the reasons why a score was awarded based on the marking scheme of that particular question.
- 6.2.4.4 Using the *Approach* question set out at 6.2.1.2 and the associated *Marking Scheme* set out at 6.2.2.2 as example, evaluators should note that component part i i.e. *Provide a detailed description of how the Potential Provider proposes to*

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deliver the requirements of the Facilities Management Contract is mandatory and therefore if the potential provider has not provided a detailed description then they would automatically score 0. The rationale could therefore state:

The Potential Provider has provided a response however it is felt that component part i has not been met in full. The response lacks detail around how the Potential Provider will deliver the requirements of the Facilities Management Contract. The response therefore does not fully satisfy the requirements of this question.

6.2.4.5 If component part i had been met along with ii and iv however the response did not provide detailed information regarding approach to quality then a 35 should be awarded.

6.2.4.6 The rationale provided for awarding this score should include the reasons why, i.e:

The Potential Provider met component parts i, ii and iv however they did not provide sufficient detail around their approach to quality therefore a 35 has been awarded.

6.2.4.7 Evaluators should not mark potential providers down for something that has not been asked for within a question.

6.2.4.8 It is mandatory that evaluators score responses based on the component parts of the question and the marking scheme and **not:**

- (a) Existing knowledge of that organisation;
- (b) Additional requirements that have not been mentioned within the question or marking scheme;
- (c) Additional material that has not been requested but included as separate attachments; and
- (d) Comparisons between other Tender Responses submitted by different Potential Providers.

6.2.4.9 It is important to note that there may be different marking schemes for different questions and therefore please do not assume that all are the same.

6.3 Once the evaluator is happy with the scores awarded and the rationale to justify those scores, the Evaluation Templates should be completed for each bidder and sent back to Crown Commercial Service.

6.4 After reviewing the scores and rationale, Crown Commercial Service will go back to evaluators and ask them to provide more rationale if the rationale provided seems insufficient and/or not aligned with the marking scheme. This will impact on time,

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resource, cost and also the 20 working day target meaning the timetable maybe affected.

7. CONSENSUS MEETING

- 7.1 If a consensus meeting has been agreed as part of the evaluation process the date will be predetermined as part of the tender documentation to ensure all evaluation panel members are available to attend.
- 7.2 Crown Commercial Service will conduct this meeting to discuss scores and rationale with the objective of gaining an agreed consensus for each potential provider's response.
- 7.3 Evaluators should not alter their individual scores if it is felt that a score needs to be changed after discussion. The Spot Buy team member will enter a consensus score, detailing the reasons for the change and rationale.

8. AWARD

- 8.1 Once all agreed scores have been received by Crown Commercial Service and the price evaluation scores have been inputted, the Spot Buy team member will obtain a report from the e-sourcing suite that provides the overall score and ranking.
- 8.2 This spot Buy team member will then complete an award recommendation report which will be sent to the customer for approval.
- 8.3 Once approved by the customer, Crown Commercial Service will issue outcome letters that contain all agreed scores and rationale for each score.