



Crown  
Commercial  
Service

# Invitation to Tender Attachment 2 – How to bid

## RM6226 Debt Resolution Services

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## 1 How to make your bid

Your bid must be made by the organisation that will be responsible for providing the goods and/or services if your bid is successful.

You may bid for one or more of the lots 1 - 20, ensure you read paragraph 4 of Attachment 1.

Your bid must be **entered into the eSourcing suite**. We can only accept bids that we receive through the eSourcing suite.

Upload **ONLY** those attachments we have asked for. Do not upload any attachments we haven't asked for.

Make sure you answer every question.

You must submit your bid before the bid submission deadline, paragraph 5 "Timelines for the competition" in Attachment 1 - About the framework.

It will be our decision whether we will accept bids submitted after the bid submission deadline.

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.

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 paragraph 6 "When and how to ask questions" in Attachment 1 - About the framework.

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

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.

If you are relying on any key subcontractors to provide the answers to the technical and professional ability or you are relying on a guarantor to pass the economic and financial assessment, they must complete Parts 2 and 3 for themselves.

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 for themselves. Consortia members also need to answer questions in section 1.10 if you are using key subcontractors.

We are providing the 'Information and declaration' workbook (attachment 4) 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 a guarantor) or from other members of a consortium.

### **3 Selection Process**

After the bid submission deadline, we will check all bids to make sure we have received everything we have asked for.

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.

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.

Not all selection questions need guidance as the questions are self-evident. However other questions such as the financial question, technical and professional ability 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**

We may exclude you from the competition at the selection stage if:

- you receive a 'fail' for any of the evaluated selection questions.
- any of the information you have provided proves to be false or misleading.
- you have broken any of the competition rules in Attachment 1 About the framework, or not followed the instructions given in this ITT pack.

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**

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

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

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

## 6.1 When completing your bid you must:

- Read through the entire ITT pack specifically Framework Schedule 1 (Specification) carefully, and read more than once
- Read each question, the response guidance, marking scheme and evaluation criteria
- Read the Framework contract terms, and HMRC contract terms (see paragraph 11)
- If you are unsure, ask questions before the clarification questions deadline See paragraph 5 'Timelines for the competition' and paragraph 6 'When and how to ask questions' in Attachment 1 - About the framework document
- 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.

## 6.2 Award stage

The Award Stage consists of a quality evaluation (see section 7 and section 8 of this document) and a price evaluation (see section 9 and 10 of this document and the Price Scenario attachments for specific Lot information).

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

6.3 The weightings for the Quality and Price evaluation for each Lot are shown in the below table:

<b>Lot</b>	<b>Quality Weighting per Lot (inc Social Value at 10%)</b>	<b>Price Weighting per Lot</b>
Lot 1	45%	55%
Lot 2	70%	30%
Lot 3	70%	30%
Lot 4	70%	30%
Lot 5	90%	10%
Lot 6	70%	30%
Lot 7	70%	30%
Lot 8	70%	30%
Lot 9	70%	30%
Lot 10	70%	30%
Lot 11	70%	30%
Lot 12	70%	30%
Lot 3	70%	30%
Lot 14	70%	30%
Lot 15	70%	30%
Lot 16	70%	30%
Lot 17	70%	30%
Lot 18	70%	30%
Lot 19	70%	30%
Lot 20	70%	30%

6.4 Award stage - What YOU need to do:

- Answer the quality questions sections A and B and the questions relevant to the lots you are bidding for in sections C to Q of the quality questionnaire in the eSourcing suite in the technical envelope.
- Complete the Pricing Matrix and Price Scenario - Attachment 3 and 3.1 for the lot(s) for which you are bidding.
- Upload your completed Pricing Matrix and Price Scenario for each lot(s) you are bidding for into the eSourcing suite, in the commercial envelope PQ1.

6.5 What WE will do at the award stage :

1.	<p><b>Compliance Check</b> First, we will do a check to make sure that you completed the Price Matrix and Pricing Scenario in line with our instructions.</p>
2.	<p><b>Quality Evaluation</b> We will give your responses to our evaluation panel. Each evaluator will independently assess your responses to the quality questions using the response guidance, marking scheme and 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><b>Consensus</b> 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 for each lot you have bid for. Refer to tables A to P, at paragraph 7.1 for an example of how your <b>quality score</b> for each lot will be calculated.</p>
4.	<p><b>Quality Threshold</b> If you have not met the minimum mark for a question, we will reject your bid and you will be excluded from the competition. We will tell you that your bid has been excluded from the competition and why. Refer to tables A1 to P1 at paragraph 7.2 for the <b>minimum marks for each question</b>.</p>



5.	<p><b>Evaluate Pricing</b></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 using the evaluation criteria in specific to each Lot as per section 9 and 10 and the Price Scenario attachment for each Lot.</p>
6.	<p><b>Final Score</b></p> <p>Your quality score will be added to your price score, to create your final score as illustrated in section 12 – Final decision to award.</p>
7.	<p><b>Award of Framework Contracts</b></p> <p>Awards will be made to the successful bidders following the standstill period, subject to contract.</p>
8.	<p><b>Award of Call Off Contract for Lot 1</b></p> <p>The bidder ranked first position will be awarded the Call Off Contract subject to the Framework execution for Lot 1.</p>

## 7 Quality evaluation

Question A1 is a mandatory question and will be evaluated PASS / FAIL. If you answer no to the 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.

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.

Each of the quality questions, in sections B to Q of the quality questionnaire will be independently assessed by our evaluation panel.

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 weighting to calculate your weighted mark for that question. Examples of this can be found in the tables A to Q below.

Each weighted mark for each question for each lot you have submitted a bid for will then be added together to calculate your quality score.

- 7.1 Please see Tables A to O for an example of how your quality score will be calculated for each Lot.

Table A - Lot 1

Questions		Question Weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B2	Social Value	10.00%	0/25/50/75/100	100	50	5.00
C1	Case Management System	2.79%	0/25/50/75/100	100	50	1.40
C2	Managed Service	3.71%	0/25/50/75/100	100	50	1.86
C3	Change Management	1.86%	0/25/50/75/100	100	50	0.93
C4	Sustainability	7.43%	0/25/50/75/100	100	50	3.72
C5	Client Services	3.71%	0/25/50/75/100	100	50	1.86
C6	Continuous Improvement	2.79%	0/25/50/75/100	100	50	1.40
C7	Collection Strategies	4.64%	0/25/50/75/100	100	50	2.32
C8	Management Information	1.86%	0/25/50/75/100	100	50	0.93
C9	Resource and Capability	3.71%	0/25/50/75/100	100	50	1.86
C10	Security	2.50%	0/25/50/75/100	100	50	1.25
					<b>Bidders Score</b>	<b>22.53</b>

Table B – Lot 2

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B2	Social Value	10%	100/75/50/25/0	100	50	5.00
D1	Data and Information	24%	100/66/33/0	100	33	7.92
D2	Capability, Agility and Continuous Improvement	12%	100/66/33/0	100	33	3.96
D3	Service Delivery Options	6%	100/66/33/0	100	66	3.96
D4	Resolving Issues and Maximising Take up of Services	18%	100/66/33/0	100	66	11.88
					<b>Bidders Quality Score</b>	<b>32.72</b>

70%

Table C – Lot 3

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
E1	Systems, Process, Interfaces and Data	30%	10/66/33/0	100	33	9.90
E2	Quality, Security and Customer Solutions	10%	100/66/33/0	100	33	3.30
E3	Service Delivery	20%	100/66/33/0	100	33	6.60
					<b>Bidders Quality Score</b>	<b>24.80</b>

Table D – Lot 4

Questions	Question weighting		Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
F1	Capability, Resources and Experience	60%	100/66/33/0	100	33	19.80
					<b>Bidders Quality Score</b>	<b>24.80</b>

Table E – Lot 5

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B2	Social Value	10%	100/75/50/25/0	100	50	5.00
G1	Capability, Resources and Capability	32%	100/66/33/0	100	33	10.56
G2	Local and National Enforcement Services	12%	100/75/50/25	100	50	6.00
G3	Approach to Enforcement Services	16%	100/66/33/0	100	66	10.56
G4	Customer Management and Service Provision	20%	100/66/33/0	100	66	13.20
					<b>Bidders Quality Score</b>	<b>45.32</b>

Table F – Lot 6

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
H1	Litigation processes	30%	100/66/33/0	100	33	9.90
H2	Client Services and Value for Money	30%	100/66/33/0	100	33	9.90
Bidders Quality Score						24.80

Table G – Lot 7

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
I1	Litigation processes	30%	100/66/33/0	100	33	9.90
I2	Client Services and Value for Money	30%	100/66/33/0	100	33	9.90
Bidders Quality Score						24.80

Table H – Lot 8, Lot 9, Lot 10, Lot 11, Lot 12 and Lot 13

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
J1	Early Action	30%	100/66/33/0	100	33	9.90
J2	Asset Management - Removal, Transportation and Storage	30%	100/75/50/25/0	100	50	15.00
Bidders Quality Score						29.90

Table I – Lot 14

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
K1	Case Management	30%	100/66/33/0	100	33	9.90
K2	Systems, Data, Legislation Requirements and Staff Capacity	30%	100/75/50/25/0	100	50	15.00
Bidders Quality Score						29.90

Table J – Lot 15

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
L1	Lot 15 Accounts Payable	60%	100/75/50/25/0	100	50	30.00
Bidders Quality Score						35.00

Table K – Lot 16

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
M1	Lot 16 General Compliance	60%	100/66/33/0	100	66	39.60
Bidders Quality Score						44.60

Table L – Lot 17

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
N1	Lot 17 Specialist Review Utilities	60%	100/66/33/0	100	66	39.60
					<b>Bidders Quality Score</b>	<b>44.60</b>

Table M – Lot 18

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
O1	Lot 18 Specialist Review Communication	60%	100/66/33/0	100	66	39.60
					<b>Bidders Quality Score</b>	<b>44.60</b>

Table N – Lot 19

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B1	Social Value	10%	100/75/50/25/0	100	50	5.00
P1	Lot 19 Specialist Review VAT	60%	100/66/33/0	100	66	39.60
					<b>Bidders Quality Score</b>	<b>44.60</b>

Table O – Lot 20

Questions		Question weighting	Marking scheme	Maximum mark available	Your final mark	Your weighted mark
B2	Social Value	10%	100/75/50/25/0	100	50	5.00
Q1	People, Systems and Processes	20%	100/66/33/0	100	33	6.60
Q2	EA Subcontractor Performance and Relationship Management	20%	100/75/50/25/0	100	50	10.00
Q3	User Platforms, Service Delivery and Customer Satisfaction	10%	100/75/50/25/0	100	50	5.00
Q4	Customer Records and Compliance	10%	100/66/33/0	100	33	3.30
					<b>Bidders Quality Score</b>	<b>29.90</b>

- 7.2 Please see tables A1 to O1 for the question weightings and minimum mark. If you have not met the minimum mark for a question, we will reject your bid and you will be excluded from the competition. We will tell you that your bid has been excluded from the competition and why

Table A1- Lot 1

Questions		Question weighting	Minimum mark
B2	Social Value	10.00%	50
C1	Case Management System	2.79%	50
C2	Managed Service	3.71%	50
C3	Change Management	1.86%	50
C4	Sustainability	7.43%	50
C5	Client Services	3.71%	50
C6	Continuous Improvement	2.79%	50
C7	Collection Strategies	4.64%	50
C8	Management Information	1.86%	50
C9	Resource and Capability	3.71%	50
C10	Security	2.50%	50

Table B1 – Lot 2

Questions		Question weighting	Minimum mark
B2	Social Value	10.00%	50
D1	Data and Information	24.00%	33
D2	Capability, Agility and Continuous Improvement	12.00%	33
D3	Service Delivery Options	6.00%	66
D4	Resolving Issues and Maximising Take up of Services	18.00%	66

Table C1 – Lot 3

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
E1	Systems, Process, Interfaces and Data	30.00%	33
E2	Quality, Security and Customer Solutions	10.00%	33
E3	Service Delivery	20.00%	33

Table D1 – Lot 4

Questions		Question weighting	Minimum mark
B1	Social Value	10%	50
F1	Capability, Resources and Experience	60%	33

Table E1 – Lot 5

Questions		Question weighting	Minimum mark
B2	Social Value	10.00%	50
G1	Capability, Resources and Capability	32.00%	33
G2	Local and National Enforcement Services	12.00%	50
G3	Approach to Enforcement Services	16.00%	66
G4	Customer Management and Service Provision	20.00%	66

Table F1 – Lot 6

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
H1	Litigation processes	30.00%	33
H2	Client Services and Value for Money	30.00%	33

Table G1 – Lot 7

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
I1	Litigation processes	30.00%	33
I2	Client Services and Value for Money	30.00%	33

Table H1 – Lot 8, Lot 9, Lot 10, Lot 11, Lot 12 and Lot 13

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
J1	Early Action	30.00%	33
J2	Asset Management - Removal, Transportation and Storage	30.00%	50

Table I1 – Lot 14

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
K1	Case Management	30.00%	33
K2	Systems, Data, Legislation Requirements and Staff Capacity	30.00%	50

Table J1 – Lot 15

Questions		Question weighting	Minimum Acceptable Mark
B1	Social Value	10.00%	50
L1	Lot 15 Accounts Payable	60.00%	50

Table K1 – Lot 16

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
M1	Lot 16 General Compliance	60.00%	66

Table L1 – Lot 17

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
N1	Lot 17 Specialist Review Utilities	60.00%	66

Table M1 – Lot 18

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
O1	Lot 18 Specialist Review Communication	60.00%	66

Table N1 – Lot 19

Questions		Question weighting	Minimum mark
B1	Social Value	10.00%	50
P1	Lot 19 Specialist Review VAT	60.00%	66

Table O1 – Lot 20

Questions		Question weighting	Minimum mark
B2	Social Value	10.00%	50
Q1	People, Systems and Processes	20.00%	33
Q2	EA Subcontractor Performance and Relationship Management	20.00%	50
Q3	User Platforms, Service Delivery and Customer Satisfaction	10.00%	50
Q4	Customer Records and Compliance	10.00%	33

## **8 Quality questionnaire**

8.1 The quality questionnaire is split into the following sections:

Section A Mandatory question

Section B Social Value questions

Section C Lot 1 questions

Section D Lot 2 questions

Section E Lot 3 questions

Section F Lot 4 questions

Section G Lot 5 questions

Section H Lot 6 questions

Section I Lot 7 questions

Section J Lot 8 to Lot 13 questions

Section K Lot 14 questions

Section L Lot 15 questions

Section M Lot 16 questions

Section N Lot 17 questions

Section O Lot 18 questions

Section P Lot 19 questions

Section Q Lot 20 questions

8.2 In the technical envelope, you will be asked to confirm which Lots you are bidding for. You will only be able to access the Lot specific questions for the Lots you confirm you are bidding for in this question. Please ensure you select the correct Lots.

8.3 A summary of all the questions in the quality questionnaire, along with the weightings and minimum mark for each question is set out in tables at paragraph 7.1 and 7.2.



8.4 Quality questionnaire sections A and B:

<b>Section A – Mandatory service requirements - All Lots</b>	
<b>A1 Compliance with Framework Schedule 1 (Specification)</b>	
<p>If you are awarded a framework contract, will you unreservedly deliver in full, all the mandatory service requirements as set out in Framework Schedule 1 (Specification).</p> <p>Please answer ‘Yes’ or ‘No’.</p> <p>Yes - You will unreservedly deliver in full all the mandatory service requirements as set out in Framework Schedule 1 (Specification) for the Lot(s) you are bidding for.</p> <p>No - You will not, or cannot, deliver in full all the mandatory service requirements as set out in Framework Schedule 1 (Specification) for the Lot(s) you are bidding for.</p>	
<p><b>Response guidance</b></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 or NO from the drop down list.</p> <p>Providing a ‘Yes’ response means you will unreservedly deliver in full all the mandatory service requirements as set out in Framework Schedule 1 (Specification) for the Lot(s) you are bidding for.</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 as set out in Framework Schedule 1 (Specification) for the Lot(s) you are bidding for you will be excluded from further participation in this competition.</p>	
<b>Marking scheme</b>	<b>Evaluation guidance</b>
Pass	You have selected option ‘Yes’ confirming that you will unreservedly deliver in full all mandatory service requirements as set out in Framework Schedule 1 (Specification) for the Lot(s) you are bidding for .
Fail	You have selected ‘No’ confirming that you will not, or cannot, deliver in full all the Lot specific mandatory service requirements as set out in Framework Schedule 1 (Specification) for the Lot(s) you are bidding for .

## Section B – Social Value Questions

### Question B1 - Social Value

(Lots 3, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18 and 19)

#### Requirement: Social Value

CCS requires Bidders to demonstrate how you will influence staff, suppliers, customers and communities through the delivery of the contract to support health and wellbeing, including physical and mental health, and specifically how you will deliver one or more of the following requirements as set out in Framework Schedule 1 - Specification:

- a. Financial education of consumers by providing debt advice - Improving budgeting skills, through investment in tools / solutions e.g. digital tools that guide and advise on money matters
- b. Education in communities, vulnerable groups, financial resilience and employments skills events in areas of social deprivation through contributions to, or funding of events, schools and colleges and were requested by CCS or the Buyer, working with CCS, Buyers, 3rd Sector and charities
- c. Practical support and advice for vulnerable customers, e.g. opening Bank accounts, setting up savings schemes etc
- d. Working with advice sector - dedicated resources working with the sector on debt / money matters / employability skills and social mobility
- e. Provision of R&A / anonymous data and insight into financially vulnerable individuals at a societal and societal sub-set level, to help inform understanding and social policy on managing, preventing and resolving debt
- f. Create/ facilitate and/ or support training programmes that work across the Government to ensure consistently high standards in regards to identification and management of vulnerable consumers across Government and the wider public sector

#### Response guidance

All Bidders who are bidding for Lots 3, 4, 6, 7, 8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19 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, you must demonstrate:

- a) Relevance – how your commitment meets the requirements and clearly relates the requirements, what outcomes will be achieved and how will they be measured and evaluated?
- b) Added value – how your commitment creates new social value as opposed to reusing existing programs

- c) Added value - how your non financial commitment increases annually as opposed to remaining static through the life of the contract and how your commitment will continue beyond the framework
- d) Resource commitment – people numbers and seniority relative to size of your organisation and financial relative to size of your organisation / revenue from the contract

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 –12,000 characters including spaces and punctuation.

You must not exceed the character count within the e-Sourcing suite. Responses must include spaces between characters. No attachments are permitted; any additional documents submitted will be ignored in the evaluation of this question.

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.

## Question B2 - Social Value (Lots 1, 2, 5 and 20)

### Requirement

All bidders who are bidding for Lots 1, 2, 5 and 20 must answer this question. You must insert your response into the text fields in the eSourcing suite.

CCS requires Bidders to demonstrate how you will influence staff, suppliers, customers and communities through the delivery of the contract to support health and wellbeing, including physical and mental health, and specifically how you will deliver one or more of the following requirements:

- a. Financial education of consumers by providing debt advice - Improving budgeting skills, through investment in tools / solutions e.g. digital tools that guide and advise on money matters
- b. Education in communities, vulnerable groups, financial resilience and employments skills events in areas of social deprivation through contributions to, or funding of events, schools and colleges and were requested by CCS or the Buyer, working with CCS, Buyers, 3rd Sector and charities
- c. Practical support and advice for vulnerable customers, e.g. opening Bank accounts, setting up savings schemes etc
- d. Working with advice sector - dedicated resources working with the sector on debt / money matters / employability skills and social mobility
- e. Provision of R&A / anonymous data and insight into financially vulnerable individuals at a societal and societal sub-set level, to help inform understanding and social policy on managing, preventing and resolving debt
- f. Create/ facilitate and/ or support training programmes that work across the Government to ensure consistently high standards in regards to identification and management of vulnerable consumers across Government and the wider public sector

### Response Guidance

In order to satisfy the requirement, and the question associated with the requirement, you must demonstrate:

- a) Resource commitment – people numbers and seniority relative to size of your organisation and financial relative to size of your organisation / revenue from the contract
- b) Relevance – how your commitment meets the requirements and clearly relates to the requirement, what outcomes will be achieved and how will they be measured and evaluated?
- c) Added value – how your commitment creates new social value as opposed to reusing existing programs and how your non financial commitment increases annually as opposed to remaining static through the life of the contract
- d) Legacy – how your commitment will continue beyond the framework

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 – 12,000 characters including spaces and punctuation.

You must not exceed the character count within the e-Sourcing suite. Responses must include spaces between characters. No attachments are permitted; any additional documents submitted will be ignored in the evaluation of this question.

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.

### Sections C to Q – Lot specific quality questions

Each Annex contains the Lot specific question(s), the response guidance, marking scheme and evaluation criteria.

Remember in the technical envelope, you will be asked to confirm which Lots you are bidding for. You will only be able to access the Lot specific questions for the Lots you confirm you are bidding for in the question. Please ensure you select the correct Lots.

Attachment 2c Annex A	AQ Section C Lot 1
Attachment 2c Annex B	AQ Section D Lot 2
Attachment 2c Annex C	AQ Section E Lot 3
Attachment 2c Annex D	AQ Section F Lot 4
Attachment 2c Annex E	AQ Section G Lot 5
Attachment 2c Annex F	AQ Section H Lot 6

Attachment 2c Annex G	AQ Section I Lot 7
Attachment 2c Annex H	AQ Section J Lots 8 - 13
Attachment 2c Annex I	AQ Section K Lots 14
Attachment 2c Annex J	AQ Sections L,M,N,O,P Lot 15 - 19
Attachment 2c Annex K	AQ Section Q Lot 20

## 9 Price evaluation

This paragraph contains information on how to complete the pricing in Attachment 3 and 3.1 and the price evaluation process.

### 9.1 How to complete your pricing templates:

Read and understand:

- Framework Schedule 3 Framework Prices guidance,
- The instructions in the Attachment 3 Pricing Matrix and Attachment 3.1 Price Scenario templates
- The Data Room historical data (for Lot 1 only),

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

### 9.3 You should also take into account that, where applicable, our management charge of 1% which shall be paid by you to us, as set out in the Framework Award form

### 9.4 You should have read and understood the information on TUPE in paragraph 9 of Attachment 1 – About the framework. You are reminded that it is your responsibility to take your own advice and consider whether TUPE is likely to apply and to act accordingly. You are encouraged to carry out your own due diligence exercise on the application of TUPE when completing your pricing matrix.

### 9.5 Your prices submitted must :

- exclude VAT.
- be exclusive of expenses/travel and subsistence
- be in British pounds sterling, up to two decimal places
- where % has been requested round to 1 decimal place i.e. 1.5%

### 9.6 Rates will be based on:

- eight (8) hour Working Day; and
- rounded to the nearest £10.

- 9.7 Zero or negative bids will not be allowed. We will investigate where we consider your bid to be abnormally low.
- 9.8 The prices submitted will be the maximum payable under this framework. Prices may be lowered at the call-off stage.
- 9.9 The prices submitted for Lot 1 will be used to form the HMRC Call Off Contract.
- 9.10 You must download and complete the Attachment 3 - Pricing Matrix and 3.1 Price Scenario for the lot(s) you are submitting a bid for.
- 9.11 Provide a price, where one has been requested, in the cells highlighted yellow ensuring you complete all Tabs on the templates provided.
- 9.12 Prices submitted in the Attachment 3 Pricing Matrix and Attachment 3.1 Price Scenario must align and will be cross checked.
- 9.13 The Pricing contained in Attachment 3.1 Price Scenario will be used to evaluate your Price.
- 9.14 When you have completed your Attachment 3 - Pricing Matrix and Attachment 3.1 Price Scenario templates, for each Lot you are bidding for, you must upload them into the eSourcing portal at the Commercial Envelope on the eSourcing suite at question PQ1 in the commercial envelope.
- 9.15 Please ensure your completed Attachment 3 - Pricing Matrix and Attachment 3.1 Price Scenario templates are clearly labelled for the Lot you are bidding. Please do not change the naming convention of the Attachments described in Attachment 1 - How to Bid. Name your Pricing attachments as in the example below:  
Attachment 3 Pricing Matrix Lot 1 *[insert your organisation name]*  
Attachment 3.1 Price Scenario Lot 1 *[insert your organisation name]*  
Attachment 3 Pricing Matrix Lot 5 *[insert your organisation name]*  
Attachment 3.1 Pricing Matrix Lot 5 *[insert your organisation name]*
- 9.16 If you do not upload your completed Attachment 3 - Pricing Matrix and Attachment 3.1 Price Scenario templates your bid may be rejected from this competition.
- 9.17 Do not alter, amend or change the format or layout of your Attachment 3 - Pricing Matrix and Attachment 3.1 Price Scenario templates.

## 10 Price evaluation process

- 10.1 This is how we will evaluate your pricing:
- We will check you have completed all the yellow cells in the Attachment 3 - Pricing Matrix and Attachment 3.1 Price Scenario for the Lots you are bidding for.
  - Failure to insert an applicable price may result in your bid being deemed non-compliant and may be rejected from this competition. Remember zero or negative prices will not be accepted.
  - The price evaluation will be undertaken separately to the quality evaluation process.
- 10.2 Further guidance on how your bid will be evaluated including the sub weightings for each of the evaluation criteria for price per Lot can be found in the Attachment 3.1 Price Scenario for each Lot.

## 11 Abnormally low tenders

- 11.1 Where we consider any of the price(s) you have submitted to have no correlation with the quality of your offer or to be abnormally low or will ask you to explain the price(s) you have submitted (as required in regulation 69 of the Regulations).
- 11.2 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
- 12.2 We will add your quality score to your price score to calculate your final score.

Example Lot 2 :

Bidder	Quality score	Price score	Final score
	(Maximum score available 70)	(Maximum score available 30)	(Maximum score available 100)
Bidder A	70.00	30.00	100.00
Bidder B	60.00	15.00	75.00
Bidder C	50.00	12.00	62.00

- 12.3 We will then rank all final scores from highest to lowest.
- 12.4 We will offer the number of bidders a framework contract as set out in 'How the Framework is structured' section of Attachment 1 – About the Framework.



### 13 Intention to award

- 13.1 You can submit a bid for one or more lots. If you have submitted a bid for more than 1 lot and are successful on more than one lot, you will be awarded a place on any lot that you are successful on.
- 13.2 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. who have not been excluded.
- 13.3 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.
- 13.4 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.
- 13.5 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.

### 14 Framework contract

- 14.1 You must sign and return the framework contract within 10 days of being asked. If you do not sign and return, we will withdraw our offer of a framework contract.
- 14.2 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, see Attachment 2a Selection Questionnaire.

#### 14.2.1 Insurance requirements

You will be required to provide the below evidence prior to the Framework Start Date:

Lot	Employer's (Compulsory) Liability Insurance	Public Liability Insurance	Professional Indemnity Insurance	Comprehensive Crime Insurance	Cyber Insurance
Lot 1	£5,000,000	£5,000,000	£5,000,000	£5,000,000	£5,000,000
Lot 2	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 3	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 4	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 5	£5,000,000	£5,000,000	£5,000,000	£5,000,000	£5,000,000
Lot 6	£5,000,000	£2,000,000	£2,000,000	£2,000,000	£2,000,000
Lot 7	£5,000,000	£2,000,000	£2,000,000	£2,000,000	£2,000,000

Lot 8	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 9	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 10	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 11	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 12	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 13	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 14	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 15	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 16	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 17	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 18	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 19	£5,000,000	£1,000,000	£1,000,000	£1,000,000	£1,000,000
Lot 20	£5,000,000	£5,000,000	£5,000,000	£5,000,000	£5,000,000

#### 14.2.2 Standards Lot 1

You will be required to provide the below evidence prior to the Framework Start Date for your organisation and if applicable consortia members and key subcontractors:

Lot	Cyber Essentials Plus	ISO:27001 and Statement of Application	ISO:9001 or equivalent	PCI DSS	FCA registration
Lot 1	✓	✓	✓	✓	✓

#### 14.2.3 Standards Lots 2 to 20

You will be required to provide the below evidence by the Framework Start Date or within 30 days of the Framework Start Date for your organisation and if applicable consortia members and key subcontractors:

Lot	Cyber Essentials Plus	Cyber Essentials	ISO:27001 and Statement of Application	PCI DSS
Lot 2	✓		✓	
Lot 3	✓		✓	
Lot 4		✓		
Lot 5	✓		✓	✓
Lot 6	✓		✓	✓
Lot 7	✓		✓	✓
Lot 8	✓		✓	
Lot 9	✓		✓	
Lot 10	✓		✓	
Lot 11	✓		✓	
Lot 12	✓		✓	
Lot 13	✓		✓	

Lot 14	✓		✓	
Lot 15		✓		
Lot 16		✓		
Lot 17		✓		
Lot 18		✓		
Lot 19		✓		
Lot 20	✓		✓	✓

#### 14.2.4 All lots

You will be required to provide evidence by the Framework Start Date of your Apprenticeship/Current Skills Process that can demonstrate commitment to supporting, developing and maintaining skills required.

## 15 HMRC Call Off Contract

- 15.1 We will award the Call Off Contract on behalf of HMRC to the first placed supplier on Lot 1 following execution of the Framework Contract. See paragraph 11 Attachment 1 – About the framework.