**DBS Debt Management Legal Support and Tracing Services**

**DEFFORM 47 Annex B – Tender Evaluation including Social Value**

**Version**

**ITT V1.0**

**Date 30/05/2024**

**ITT COMPLETION AND EVALUATION GUIDE**

**Tender Submission**

1. The Tender submission must be completed in accordance with Sections C, and E of the DEFFORM 47.
2. The Tender submission must comprise of the following documents:
3. A completed and signed Tender Submission Document (Offer) – Annex A to DEFFORM 47 (uploaded into the Commercial Envelope on the DSP).
4. A completed Technical Tender Response Sheet - Section 2 to Annex B to DEFFORM 47 - Response to technical questions to detail how you will meet the requirement (from within this document – to be uploaded into the Technical Envelope on the DSP).
5. A completed Schedule 2 – Schedule of Requirements with Prices (to be uploaded into the Commercial Envelope on the DSP).
6. A completed Annex C to DEFFORM 47 – Pricing Scenarios (to be uploaded into the Commercial Envelope on the DSP)
7. A completed Schedule 5 – Contractor's Commercially Sensitive Information Form (to be uploaded into the Technical Envelope on the DSP).
8. A Cyber Essentials Plus Accreditation Certificate or a Cyber Implementation Plan (CIP) (to be uploaded into the Qualification Envelope on the DSP).
9. A completed Statement Relating to Good Standing to be uploaded into the Qualification Envelope on the DSP).

**Tender Evaluation**

1. The Tender Evaluation will be conducted on the information provided in the Tender submission only. Please do not insert web links in your Tender submission.
2. The Tender evaluation will be undertaken using the Value for Money Index (VFM Index) method for the Most Economically Advantageous Tender (MEAT) - as follows:
   1. Commercial Evaluation – Pass or Fail (not scored)
   2. Technical Evaluation / Financial Evaluation (non cost score / price)
3. The Commercial Delivery team will facilitate the evaluation process, providing the Technical Tender Response Sheet (Section 2 of this Annex B to DEFFORM 47) to the appointed Technical evaluators. Only the Commercial Delivery team will have visibility of the whole Tender submission.

**Commercial Evaluation**

1. The Commercial Evaluation ensures that the Tender meets all the Mandatory Commercial Requirements.
2. The Commercial Evaluation is contained at Section 1 of this document.
3. The Mandatory Commercial Requirements for a Tender to be commercially compliant are:
   1. The Tenderer must accept the Terms and Conditions of Contract (Yes/No question in DSP);
   2. The Tenderer must accept that electronic trading including payment of goods and services will be made using the Authority’s Contracting, Purchasing and Finance (CP&F) tool (Yes/No question in DSP);
   3. The Tender must include a completed and scanned original signed copy of Annex A to DEFFORM 47 (Offer) -including all the Mandatory Declarations;
   4. The Tender must include a completed Annex B to DEFFORM 47 – Technical Tender Response (Section 2 of this document).
   5. The Tender must include a priced version of Schedule 2 – Schedule of Requirements and Prices providing Firm Prices for each of the items.
   6. The Tender must include a completed Annex C to DEFFORM 47 – Pricing Scenarios.
   7. The Tender must include a completed Schedule 5 - Contractor’s Commercially Sensitive Information.
   8. The Tender must include a completed and scanned original signed copy of the Statement Relating to Good Standing.
4. The response to Mandatory Commercial Requirements a and b (as above) are to be completed in the DSP. If a Tenderer states “No” for any of the Mandatory Requirements in Section 1, Table 1 the Tender will be assessed as non-compliant and Fail the Commercial Evaluation and will be removed from further evaluation and the competition.
5. Mandatory Commercial Requirements c-h (as above) are contained in Section 1, Table 2 for the Commercial Evaluator to confirm the Tender meets the Mandatory Commercial Requirements. If the answer to any of the Mandatory Requirements in Table 2 are “No” the Tender will be assessed as non-compliant and Fail the Commercial Evaluation and will not be taken further in the Tender Evaluation process and will be removed from the competition.
6. Commercially compliant Tenders will continue to the Technical Evaluation.

**Technical Evaluation**

1. The Technical Evaluation is the evaluation of how a Tenderer intends to meet the Authority’s requirements. It will be undertaken using the responses to the questions detailed at Section 2 of this document.
2. Tenderers must provide responses to all the questions in the Technical Tender Response and upload the completed document in Microsoft Word format to the DSP.
3. Each question contains details of the evidence required and a description for each score banding.
4. Tender responses to each Technical Evaluation question will be scored as per the Scoring matrix for the question.
5. The evaluators will independently conduct their evaluation of each suppliers response, the Tender Evaluation Panel will then sit and the evaluation scores for each tender will be moderated.
6. Each Technical Evaluation question is weighted as follows:

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| **Question** | **Weighting** | **Available Score** |
| **1** | **15** | **150** |
| **2** | **15** | **150** |
| **3** | **10** | **100** |
| **4** | **10** | **100** |
| **5** | **15** | **150** |
| **6** | **10** | **100** |
| **7** | **10** | **100** |
| **8** | **5** | **50** |
| **SV 1** | **5** | **50** |
| **SV 2** | **5** | **50** |
| **Total** | **100** | **1000** |

The score for each question will be multiplied by the weighting to provide the final score for the question.

1. At the end of the Technical Evaluation, the weighted scores will be added together to provide the Total Technical (Non-cost) Score.
2. To be Technically Compliant and pass the Technical Evaluation, the Tender must not receive a Concern score (0-3) for any of the questions. If a Tender receives a Concern score for any question, regardless of the overall score the Tender will fail the technical evaluation, will not be taken further in the evaluation process and will be removed from the competition.
3. Technically Compliant Tenders will then continue to the Financial Evaluation.

**Financial Evaluation**

1. The Financial Evaluation, evaluation of price, will be undertaken using the price submitted in the “Totals of all Scenarios 1 to 9” (Cell AP6) of Annex C to DEFFORM 47 – Pricing Scenarios - this price will be the same as that submitted in the “Total Value of Tender (excluding VAT)” section of Annex A to DEFFORM 47.

**Overall Tender Score**

1. The overall tender score will be calculated using the Value for Money index where the Technical Score (non cost score) will be divided by the Price (as submitted in “Scenario Total” (Cell P6) of Annex C to DEFFORM 47 – Pricing Scenario) to obtain the overall Tender Score as shown in the example below.

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| Tender | Technical (Non-cost) score | Price (£NPV) | VFM Index | Rank |
| A | 62 | 20 | 3.10 | 3 |
| B | 85 | 24 | 3.54 | 1 |
| C | 100 | 29 | 3.44 | 2 |

**Winning Tender**

1. The winning Tender shall be the Commercially and Technically compliant Tender which has the highest VFM Index (as shown in the example above). In the instance that two or more Tenders have the same VFM Index, the Tender with the highest score for Technical question 4 will be the winning Tender. In the unlikely event that two or more Tenders have the same score and the same highest score for Technical question 4, the wining Tender will also have the highest score for Technical question 5.

**TENDER EVALUATION SECTION 1**

**Commercial Evaluation Tender Response Sheet - To be completed by the Tenderer in the DSP.**

MANDATORY REQUIREMENTS – Table 1

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| Do you accept the Terms and Conditions of Contract | YES/NO |
| Do you accept that electronic trading including payment of goods and services will be made using the Authority’s Contracting, Purchasing and Finance (CP&F) tool? | YES/NO |

**To be completed by Commercial Evaluator:**

MANDATORY REQUIREMENTS – Table 2

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| Does the Tender include a completed and signed copy DEFFORM 47 Annex A Offer (including all the Mandatory Declarations)? | YES/NO |
| Does the Tender include a completed Section 2 to Annex B to DEFFORM 47-Tender Response Answer Sheet (included in this document) | YES/NO |
| Does the Tender include a priced version of Schedule 2 – Schedule of Requirements and Prices? | YES/NO |
| Does the Tender include a completed Annex C to DEFFORM 47 – Pricing Scenarios | YES/NO |
| Does the Tender include a completed Schedule 5 – Contractor’s Commercially Sensitive Information. | YES/NO |
| Does the Tender include a completed Cyber Essentials Plus Certificate or a Cyber Implementation Plan (CIP)? | YES/NO |
| Has the supplier completed the Statement Relating to Good Standing? | YES/NO |

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| Commercial evaluation | PASS /FAIL |
| Tender Commercially Compliant  (To be Commercially Compliant the Tender must pass the Commercial Evaluation by having all YES answers to the Mandatory Commercial Requirements) | YES/NO |
| Evaluators Comments: | |

**TENDER EVALUATION SECTION 2**

**Technical Tender Response - To be completed by the Tenderer in Word format and uploaded into the DSP.**

**Question 1**

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| **Proposed Solution:** Please demonstrate how you will provide a debt recovery service including the provision of legal defence representation for the MOD.  Your response should cover the following sub-criteria:   * Knowledge and skills in delivering pre-proceedings for personal and commercial recovery casework including:   + mediation and arbitration   + advice on gaining a positive outcome against debtors. * Delivery of actions in order to recover debt and to defend against challenges during court proceedings for personal and commercial litigation. * Provision of advice and guidance on actions to take in relation to the laws of UK countries and those overseas prior to formal submissions. * Provision of advice and guidance on actions to take where the debtor has entered into IVA/Trust Deeds and bankruptcy proceedings. |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10:**  Detailed and extensive evidence of effective case management to ensure unnecessary or ineffective legal proceedings are avoided, and in the event that they do occur are managed effectively in all cases. Liability and damage costs are addressed effectively throughout each litigated case. Evidence of compliance with service and conduct levels as set by the relevant Law Society. |

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| **Good Confidence Score banding 4 to 6:**  Some evidence of effective case management for litigated claims with the supplier avoiding unnecessary or ineffective legal proceedings in the majority of cases. |

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| **Concern Score 0 to 3:**  Lack of evidence to show effective case management for litigated claims potentially leading to unnecessary or ineffective legal proceedings. |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 2**

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| **Proposed Solution:** Please demonstrate how you will provide a tracing action service for UK and non-UK countries.  Your response should cover the products you can supply from the following sub-criteria:   * The delivery of asset listings. * Any liabilities such as CCJ or Charging Orders etc. * Current Employment Status * Current contact details including Email, telephone and address |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10:**  Detailed and extensive report that highlights the ability of the debtor to make payments towards the recovery of the debt through the listing of assets and employment history. Full details of present location, email address and telephone numbers to enable contact to be made. Full detail of any CCJ, Charging order, bankruptcy or degrees of incarceration. |

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| **Good Confidence Score banding 4 to 6:**  Details of employment history. Confirmation of name address and contact details. |

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| **Concern Score 0 to 3:**  Limited example on the detail of the subject, their ability to cover off any debt and any employment or personal history. |
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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 3**

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| **Proposed Solution:** Please outline details on how you will deliver management information to enable discussion to take forward casework.  Your response should cover the following sub-criteria:   * A management information plan containing relevant information to include:   + case numbers,   + cost,   + action to date and   + advice on future actions delivered to agreed timelines |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10:**  Detailed management information plan that demonstrates the need for transfer of information to agreed timelines for regular updates on progress of cases, costs incurred to date and how cases should be progressed to achieve an agreed outcome and value for money. Ad hoc reports are generated promptly and add value to support media enquiries, Ministerial Correspondence and FOIs etc |

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| **Good Confidence Score banding 4 to 6:**  A management information plan that demonstrates how the progress of cases and are produced to a required timeline. |

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| **Concern Score 0 to 3:**  An insubstantial management information plan with limited detail and is only available on request |
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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 4**

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| **Knowledge and Experience:** Please demonstrate how you would identify and implement continuous improvement within a client and supplier environment.  Your response should cover the following sub-criteria:   * Improvement to working practices to aid in the recovery of debt showing value for money. * Improvements to working relationships to provide support and guidance throughout the duration of the contract. * Improvements to communication to help achieve early settlement of debts before the need to make formal submissions. |

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| **Evidence required:**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10:**  Detailed and extensive evidence of value for money being achieved and genuine aspiration for continuous improvement is evident. Close engagement with the customer to identify opportunities for improvement which add real value to the contract in high priority areas. Improvements have been implemented and benefits to the customer from those improvements have been realised. |

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| **Good Confidence Score banding 4 to 6:**  Some evidence of the supplier delivering value for money and seeking improvement opportunities in respect of the performance of the contract but with limited benefits provided to the customer |

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| **Concern Score 0 to 3:**  Little or no evidence of value for money or the supplier investing in continuous improvement |
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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 5**

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| **Relevant resources to maintain document security and legal expertise:** Please demonstrate the relevant resources within the company structure to ensure knowledge, skills and experience are available to meet the demands of a debt management service to a required standard and ensure that details relating to the customers activities are kept secure.  Your response should cover the following sub-criteria:   * Availability of appropriate resources to implement suitable activities including actions to recover debt and actions to defend MOD/DBS against cases raised. * Resources to ensure the security and safe keeping of sensitive information. * Resources to process casework for different specialisms within the customers areas of responsibility to agreed timelines. |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10**:  Detailed and extensive evidence of a broad range of legal practitioners to meet the demands of the case at any given time and a demonstration that documents are kept in a secure environment where access is limited to those with a need to know. |

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| **Good Confidence Score banding 4 to 6:**  A response evidencing resources to match the level of enquiry submitted and to keep safe the details of referred cases |

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| **Concern Score 0 to 3:**  An insubstantial response with limited evidence of legal expertise in handling casework to formal court proceedings levels or to maintain a safe environment for retention of case documents |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 6**

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| **Protection of Authority Information/Personally Identifiable (PII) Information:** Please  Provide details of how you will meet each of the requirements outlined in the Security Section of the Statement of Requirements.  Your response should cover the following sub-criteria:   * Control of access to the PII being processed. * Recruitment and training/awareness delivered to those processing PII * Protection of the PII being handled. * Secure processing of the PII within the organisation. * The transmission of PII. * The destruction of PII, when no longer required. |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10**:  Detailed and extensive evidence of a broad range of legal practitioners to meet the demands of the case at any given time and a demonstration that documents are kept in a secure environment where access is limited to those with a need to know. |

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| **Good Confidence Score banding 4 to 6:**  A response evidencing resources to match the level of enquiry submitted and to keep safe the details of referred cases |

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| **Concern Score 0 to 3:**  An insubstantial response with limited evidence of legal expertise in handling casework to formal court proceedings levels or to maintain a safe environment for retention of case documents |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 7**

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| **Processing of Authority/Personally Identifiable Information (PII) on Communications & Information Systems (CIS):** Please provide details of how you will meet each of the requirements outlined in the Security Section of the Statement of Requirements.    Your response should cover the following sub-criteria:   * How you comply with required standards. * Provide evidence of certification held to support the accreditation of the organisations CIS * Provide evidence of controls/measures in place to protect PII within the organisations CIS. * Details of the secure destruction/disposal of PII processed on the organisations CIS. |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10**:  Detailed and extensive evidence of a broad range of legal practitioners to meet the demands of the case at any given time and a demonstration that documents are kept in a secure environment where access is limited to those with a need to know. |

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| **Good Confidence Score banding 4 to 6:**  A response evidencing resources to match the level of enquiry submitted and to keep safe the details of referred cases |

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| **Concern Score 0 to 3:**  An insubstantial response with limited evidence of legal expertise in handling casework to formal court proceedings levels or to maintain a safe environment for retention of case documents |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Question 8**

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| **Incident Reporting & Management Procedures:** Please provide details of how incidents and breaches involving the Authority/Personally Identifiable Information (PII) are managed:  Your response should cover the following sub-criteria:   * Provide evidence of procedures for reporting incidents and breaches. * Provide details of how incidents and breaches are investigated and managed within the organisation. * What processes are in place to respond to lessons learned from incidents and breaches. |

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| **Evidence required:**  **All bidders must answer this question.**  Responses must be kept to a maximum of 4000 characters.  Bidders should provide a response to the question asked, covering any sub-criteria listed.  The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10**:  Detailed and extensive evidence of a broad range of legal practitioners to meet the demands of the case at any given time and a demonstration that documents are kept in a secure environment where access is limited to those with a need to know. |

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| **Good Confidence Score banding 4 to 6:**  A response evidencing resources to match the level of enquiry submitted and to keep safe the details of referred cases |

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| **Concern Score 0 to 3:**  An insubstantial response with limited evidence of legal expertise in handling casework to formal court proceedings levels or to maintain a safe environment for retention of case documents |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Social Value 1**

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| **Social Value Model:**  Theme: **Tackling Economic Inequality**  Policy Outcome: **Create new businesses, new jobs and new skills.**  Model Award Criteria**: MAC 2.3 Support educational attainment to tackle Economic Inequality** |

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| **Effective measures to deliver the following benefit through the contract:**  **Sub-criteria for MAC 2.3: Influencing support for tackling economic inequality that demonstrate and describe the tenderer’s existing or planned including**:  ● Measures to raise awareness or increase the influence of staff, suppliers, customers, communities and/or any other appropriate stakeholders to tackle economic inequality, through its performance of the contract, e.g. through engagement; co-design/creation; training and education; partnering/collaborating; and volunteering |
| Using a maximum of 4000 words describe the commitment your organisation will make to ensure that opportunities under the contract deliver the Policy Outcome and Model Award Criteria. Please include:  ● your ‘Method Statement’, stating how you will achieve this and how your commitment meets the Award Criteria, and  ● a timed project plan and process, including how you will implement your commitment and by when. Also, how you will monitor, measure and report on your commitments/the impact of your proposals. You should include but not be limited to:   * timed action plan * use of metrics * tools/processes used to gather data * reporting * feedback and improvement * transparency * How you will influence staff, suppliers, customers and communities through the delivery of the contract to support the Policy Outcome, e.g. engagement, co-design/creation, training and education, partnering/collaborating, volunteering.   The award criteria and sub-criteria (listed above) will be used to evaluate the response. |

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| **High Confidence Score banding 7 to 10:**  Response provides a detailed Method Statement and timed project plan showing how the supplier will, through existing or planned measures, actively collaborate with staff, suppliers, customers, communities and/or any other appropriate stakeholders to promote the tackling of inequality through its performance of the contract. The response includes how the supplier’s existing or planned measures will raise awareness particularly with suppliers, customers and communities. Examples of how the supplier will/has initiate(d) plans for awareness of economic inequality initiatives for the duration of the contract. |
| **Good Confidence Score banding 4 to 6:**  Response provides a Method Statement and timed project plan showing how through its performance of the contract, the supplier will or has engage(d) in projects with the local community and how they tackle economic inequality issues to the benefit of all concerned. The response highlights the different stakeholders involved. |
| **Concern Score 0 to 3:**  Response may provide a Statement and project plan showing how the supplier will deliver awareness to promote economic equality through existing or planned measures but fails to address some or all aspects of the question. |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |

**Social Value 2**

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| **Social Value Model:**  Theme: **Equal Opportunity**  Policy Outcome: **Tackle Workforce Inequality**  Model Award Criteria**: MAC 6.1: Tackling inequality in employment, skills and pay in the contract workforce** |

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| **Effective measures to deliver the following benefit through the contract:**  **Sub-criteria for MAC 6.1: Tackling inequality in the contract workforce.**  ● Measures to tackle inequality in employment, skills and pay in the contract workforce |
| The award criteria and sub-criteria will be used to evaluate the response.  Tackling inequality in the contract workforce  Activities that demonstrate and describe the tenderer’s existing or planned:  ● Understanding of the issues affecting inequality in employment, skills and pay in the market, industry, or sector relevant to the contract, and in the tenderer’s own organisation and those of its key sub-contractors.  ● Measures to tackle inequality in employment, skills and pay in the contract workforce. Illustrative examples:   * Inclusive and accessible recruitment practices, and retention-focussed activities. * Offering a range of quality opportunities with routes of progression if appropriate, e.g. T Level industry placements, students supported into higher level apprenticeships. * Working conditions which promote an inclusive working environment and promote retention and progression. * Demonstrating how working conditions promote an inclusive working environment and promote retention and progression. * A time-bound action plan informed by monitoring to ensure employers have a workforce that proportionately reflects the diversity of the communities in which they operate, at every level. * Including multiple women, or others with protected characteristics, in shortlists for recruitment and promotions. * Using skill-based assessment tasks in recruitment. * Using structured interviews for recruitment and promotions. * Introducing transparency to promotion, pay and reward processes. * Positive action schemes in place to address under-representation in certain pay grades. * Jobs at all levels open to flexible working from day one for all workers. * Collection and publication of retention rates, e.g. for pregnant women and new mothers, or for others with protected characteristics.   Regular equal pay audits conducted. |

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| **High Confidence Score banding 7 to 10:**  Response provides a detailed Method Statement and timed project plan showing the supplier’s understanding, and planned delivery, through existing or planned measures, of inclusion in the workforce, through its performance of the contract. The response includes how the supplier will work towards promoting a workforce that is reflective of society such as fair and open recruitment with anonymous sifting of applicants, the demonstration of how working conditions promote an inclusive working environment and promote retention and progression, and transparency to promotion, pay and reward processes. The response details how the supplier will collaborate with specific stakeholders in delivering equal opportunities for all regardless of race, creed, sexual orientation, or disability for the duration of the contract. |
| **Good Confidence Score banding 4 to 6:**  Response provides a Method Statement and timed project plan showing the how through its performance of the contract, the supplier plans to generate additional opportunities to reflect the diversity of the communities in which it operates including working towards inclusion of those with protected characteristics. The response references plan to collaborate with others in doing this. The response highlights the different stakeholders involved. |
| **Concern Score 0 to 3:**  Response may provide a Statement and project plan showing how the supplier will deliver additional opportunities through existing or planned measures but fails to address some or all aspects of the question. |

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| **Tenderers Response:** |

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| **Evaluator’s Score** |  |
| **Evaluator’s Comments** |  |