



## Bid Pack For Open Market Competition

This procurement event will be conducted in accordance with the Public Contract Regulations 2015, specifically Chapter 8, Below Threshold Procurements.

### Attachment 2 – How To Bid Including Evaluation Criteria

Contract Reference: CCFI20A09 Provision of Independent  
Scheme Administrator for the General  
Election 2019 Disability Reimbursement  
Scheme

#### Contents

1. How To Make Your Bid .....	2
2. How The Questionnaires Are Structured:.....	3
3. Award Criteria .....	12
4. Marking Scheme .....	14
5. Technical Evaluation .....	15
6. Commercial Evaluation .....	16
7. Final Decision to Award .....	18
8. Further Information.....	18



# 1. How To Make Your Bid

- 1.1. Your bid must be made by the organisation that will be responsible for providing the deliverables if your bid is successful.
- 1.2. Remember to:
  - 1.2.1. Accept or Decline this Bid Pack. If you Decline please provide a reason for doing so.
  - 1.2.2. Enter your bid into the e-Sourcing Suite. We can only accept bids that we receive through the e-Sourcing Suite.
  - 1.2.3. Make sure you answer every question.
  - 1.2.4. 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 e.g. reports located on your website.
  - 1.2.5. Submit your bid in good time and before the bid submission deadline.
  - 1.2.6. Upload **ONLY** those attachments we have asked for in line with the requirements specified – any other supporting evidence, certificates for example, will be requested separately by us.
  - 1.2.7. If we **do not** require attachments and have specified this please only use the Text Boxes provided for your answer.
  - 1.2.8. Check for messages in the e-Sourcing Suite throughout the competition.
  - 1.2.9. Press the Submit all **Draft Bids** button when your bid is ready, otherwise we will not be able to see it.
  - 1.2.10. If you are unsure, ask questions before the Clarification Questions Deadline.



## 2. How The Questionnaires Are Structured:

- 2.1. A summary of all the questions in the technical questionnaire, along with the marking scheme, and weightings for each question is set out below:
- 2.2. QUESTIONNAIRE 1 – QUALIFICATION - KEY PARTICIPATION REQUIREMENTS
- 2.3. QUESTIONNAIRE 2 – QUALIFICATION - CONFLICTS OF INTEREST
- 2.4. QUESTIONNAIRE 3 – QUALIFICATION - INFORMATION ONLY
- 2.5. QUESTIONNAIRE 4 - TECHNICAL – METHODOLOGY AND APPROACH
- 2.6. QUESTIONNAIRE 5 - TECHNICAL – SUBJECT EXPERIENCE
- 2.7. QUESTIONNAIRE 6 - TECHNICAL- DATA MANAGEMENT
- 2.8. QUESTIONNAIRE 7 - COMMERCIAL EVALUATION

<b>QUESTIONNAIRE 1 – QUALIFICATION - KEY PARTICIPATION REQUIREMENTS</b>		
<b>Response Guidance</b>		
The following questions are ‘Pass/Fail’ questions. If Potential Bidders are unwilling or unable to answer “Yes”, their submission will be deemed non-compliant and shall be rejected. Potential Bidders should confirm their answer by selecting the appropriate option from the drop down menu.		
<b>Question Number</b>	<b>Question</b>	<b>Your Response</b>
1.1	Do you accept the competition rules as described in Attachment 1 – About the Procurement?	Yes/No
1.2	Have you read, understood and accepted the Bid Pack and all associated attachments, specifically Attachment 3 - Statement of Requirements?	Yes/No



1.3	Do you agree, without caveats or limitations, that in the event that you are successful, Attachment 5 - Terms and Conditions will govern the provision of this contract?	Yes/No
1.4	Do you confirm your Organisation's e-Sourcing suite profile is complete and accurate at the time the bid closed and that any amendments made following acceptance of this event will be notified to the buyer in writing?	Yes/No
1.5	Please confirm that you understand that CCS reserve the right to use a credit reference agency to obtain a financial risk score for you and any members of your consortium or any nominated guarantor(s)?	Yes/No
1.6	Do you agree without caveat or limitations that you will provide upon request any relevant Insurance or Accreditation certificates?	Yes/No

## QUESTIONNAIRE 2 – QUALIFICATION - CONFLICTS OF INTEREST

### Response Guidance

Question 2.1 is a 'Yes/No' question and will dictate whether or not question 2.2 needs to be answered.

Question 2.2 is a Pass / Fail question. Potential Bidders 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 Bidders cannot or are unwilling to suitably demonstrate that they have suitable safeguards to mitigate any risk then their Bid will be deemed non-compliant and will be rejected.

Question	Question	Your
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Number		Response
2.1	Please confirm whether you have any potential, actual or perceived conflicts of interest that may be relevant to this requirement.	Yes/No
2.2	We require that any potential, actual or perceived conflicts of interest in respect of this Bid Pack 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.	Text Box

### QUESTIONNAIRE 3 – QUALIFICATION - INFORMATION ONLY

#### Response Guidance

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 procurement.

Question Number	Question	Your Response
3.1	What are your details: <ul style="list-style-type: none"> <li>• Name (registered name if registered)</li> <li>• Office address (registered address if registered)</li> <li>• Website address (if applicable)</li> <li>• Date of registration (if applicable) or date of formation</li> <li>• Registration number (company, partnership, charity etc.) if applicable</li> <li>• DUNS number (of head office, if applicable)</li> <li>• VAT number</li> </ul>	Text Box
3.2	What is your trading status: <ul style="list-style-type: none"> <li>• Public limited company</li> <li>• Limited company</li> </ul>	Text Box



	<ul style="list-style-type: none"> <li>• Limited liability partnership</li> <li>• Other partnership</li> <li>• Sole trader</li> <li>• Third sector</li> </ul> Other	
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(ees) and contact details</li> <li>• Goods/Services to be provided</li> </ul>	Text Box
3.4	Are you a Small, Medium or Micro Enterprise (SME)? <a href="#">See the definition of SME</a>	Text Box
3.5	Please provide details of where the Award Outcome should be directed. Your response must include their; <ul style="list-style-type: none"> <li>• Full Name</li> <li>• Role/Title</li> <li>• Registered Address</li> <li>• Email Address</li> <li>• Contact Number</li> </ul>	Text Box
3.6	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>	Text Box



## QUESTIONNAIRE 4 - TECHNICAL – METHODOLOGY AND APPROACH

### WEIGHTING 30%

#### Response Guidance

Potential Bidders MUST answer ALL the following questions. The method of response; page limit on attachments and evaluation criteria is set per question.

Unless otherwise specified, you must upload your response as an Attachment.

Attachments may be submitted in Microsoft Word, Excel. PDF format and must be in Arial font size 11. Page limits include the use of headers footers and diagrams. Upload ONLY those attachments we have asked for – any other supporting evidence, certificates for example, will be requested separately by us.

**No costings should be included in responses to this Questionnaire.**

Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
4.1	Please detail your organisations methodology and approach in relation to the delivery of an Independent Administrator Service and Grant Fund as detailed within the Statement of Requirements.  Your response must include separate sub-headings detailing your approach to addressing	Attachment Up to 8 sides of A4	50	100	40%



	<p>the following but not limited to:</p> <ul style="list-style-type: none"> <li>• ensuring the fund is accessible, inclusive and meets the needs of all audiences</li> <li>• an evaluation of the scheme</li> <li>• a fraud prevention, tracking and recovery plan</li> <li>• how you will comply with Data Protection requirements and ensure any sensitive information in relation to this requirement is kept secure and confidential</li> </ul>				
4.2	<p>Please detail how your organisation will plan for and manage the deliverables for this requirement.</p> <p>Your response must include:</p> <ul style="list-style-type: none"> <li>• an outline project plan / timeline</li> <li>• a 'risk register' highlighting key risks, their</li> </ul>	Attachment Up to 10 sides of A4	50	100	60%



	probability, potential impact and mitigation measures <ul style="list-style-type: none"> <li>• a map showing the process applications will follow</li> <li>• a quality assurance process for decision making</li> </ul>				
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## QUESTIONNAIRE 5 - TECHNICAL – SUBJECT EXPERIENCE

## WEIGHTING

**30%**

### Response Guidance

Potential Bidders MUST answer ALL the following questions. The method of response; page limit on attachments and evaluation criteria is set per question.

Unless otherwise specified, you must upload your response as an Attachment.

Attachments may be submitted in Microsoft Word, Excel. PDF format and must be in Arial font size 11. Page limits include the use of headers footers and diagrams. Upload ONLY those attachments we have asked for – any other supporting evidence, certificates for example, will be requested separately by us

**No costings should be included in responses to this Questionnaire.**

Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
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5.1	<p>Please demonstrate your organisations experience relevant to this requirement.</p> <p>Your response must demonstrate the following:</p> <ul style="list-style-type: none"> <li>• experience of working with existing disability groups/networks or experience of forming/developing new networks</li> <li>• experience of managing a funding scheme of similar size and/or scope</li> </ul>	Attachment Up to 6 sides of A4	50	100	100%
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#### QUESTIONNAIRE 6 - TECHNICAL – DATA MANAGEMENT

#### WEIGHTING

10%

#### Response Guidance

Potential Bidders MUST answer ALL the following questions. The method of response; page limit on attachments and evaluation criteria is set per question.

Unless otherwise specified, you must upload your response as an Attachment.

Attachments may be submitted in Microsoft Word, Excel. PDF format and must be in Arial font size 11. Page limits include the use of headers footers and diagrams. Upload ONLY those attachments we have asked for – any other supporting evidence, certificates for example, will be requested separately by us

**No costings should be included in responses to this Questionnaire.**



Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
6.1	Please provide evidence of how you will monitor and report data on applications and grant funds approved	Attachment Up to 6 sides of A4	50	100	100%

## QUESTIONNAIRE 7 – COMMERCIAL EVALUATION

**WEIGHTING 30%**

### Response Guidance

Potential Bidders must enter costs by uploading the relevant Attachment 4 - Price Schedule, at the question level on the e-Sourcing event.

Prices should be submitted in pounds Sterling inclusive of any expenses but exclusive of VAT.

Potential Bidders will be scored in accordance with the marking scheme at Section 2.

Question Number	Question	Your Response	Minimum Acceptable Score	Maximum Available Score	Weighting
7.1	Please confirm your response, by attaching a completed Price Schedule to the response to this question. In so doing, you are also confirming that prices offered are inclusive of any expenses, exclusive of VAT and firm for the period following the Deadline for Submission as stated in	Attachment	N/A	100	100%



	the Attachment 1 – About the Procurement.				
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### 3. Award Criteria

- 3.1. The award stage consists of a technical evaluation and a commercial evaluation.
- 3.2. The award of the resultant contract will be on the basis of the 'Most Economically Advantageous Tender' (MEAT).
- 3.3. The weighting for the technical evaluation is 70%; and, the commercial evaluation is 30%.

#### 3.4. Award process - What you need to do

- 3.4.1. Answer the questions in section 2 above in the e-Sourcing suite.
- 3.4.2. Complete the Attachment 4 – Price Schedule.
- 3.4.3. You must upload your completed Price Schedule into the e-Sourcing suite at questionnaire 7.

#### 3.5. What we will do

##### **Compliance Check**

First, we will complete a mandatory evaluation to make sure that you have answered all questions and have completed the Attachment 4 - Price Schedule in line with our instructions. All bids passing the mandatory evaluation will be progressed to the Technical Evaluation.

##### **TECHNICAL Evaluation**

We will give your responses to the **TECHNICAL questionnaires** to the Contracting Authority's evaluation panel. Each evaluator will independently assess your responses to the technical questions using the response guidance and the evaluation criteria.



They will give a score and a reason for their score for each question they are assessing. The evaluators will enter the scores and reasons into the e-Sourcing suite.

If the evaluation panel wishes to clarify any areas of your bid, bid clarification questions will be issued via the e-Sourcing suite on an individual basis.

### **Consensus**

Once the evaluators have independently assessed your answers to the questions we will arrange for the evaluators to meet. We will facilitate the discussion.

At this meeting, the evaluators will discuss the technical responses and review their scores and reasons for that score. The discussion will continue until they reach a consensus regarding the score, and reason for that score, for each question.

These final scores will be used to calculate your technical score. If the evaluation panel wishes to clarify any areas of your bid, bid clarification questions will be issued via the e-sourcing suite on an individual basis.

### **TECHNICAL Threshold**

If you have not met the minimum acceptable score for each question, you will be excluded from the competition. We will tell you that you have been excluded from the procurement and why at award stage.

### **Evaluate COMMERCIAL**

We will then evaluate your commercial response and calculate your score using the evaluation criteria specified.

If we wish to clarify any areas of your bid, bid clarification questions will be issued via the e-sourcing suite on an individual basis.

### **Final Score**

Your technical score will be added to your commercial score, to create your final score.

### **Award**

Award will be made to the successful bidder, subject to contract.



We will notify successful and unsuccessful bidders providing feedback.

## 4. Marking Scheme

- 4.1. The evaluation criteria set out below will be used during the Technical Evaluation:

Marking Scheme	Description
<b>100 - Excellent</b>	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.
<b>75 – Good</b>	A Good response that meets the requirements with good supporting evidence. Demonstrates good understanding.
<b>50 – Meets the Requirement</b>	Meets the requirements – the response generally meets the requirements, but lacks sufficient detail to warrant a higher mark.
<b>25 – Poor Response</b>	A poor response with reservations – the response lacks convincing detail with risk that the proposal will not be successful in meeting all of the requirements.
<b>0 - Unsuitable</b>	Failed to provide confidence that the proposal will meet the requirements. An unacceptable response with serious reservations.



## 5. Technical Evaluation

- 5.1. Questionnaires Q1 and Q2 are mandatory question(s) and will be evaluated PASS / FAIL. If you fail any of these questions, you will be excluded from the competition. We will tell you that your bid has been excluded.
- 5.2. When the consensus meeting has taken place and the final score for each question has been agreed by the evaluators, your final score for each question will be multiplied by that question's weighting to calculate your weighted score for that question.
- 5.3. Each weighted score for each question will then be added together to calculate your technical score.
- 5.4. Please see table A below for an example of how your technical score will be calculated.

**Table A – EXAMPLE ONLY**

				Bidder A			Bidder B			Bidder C		
Questionnaire	Questionnaire Weighting	Question	Question Weighting	Consensus Score (Max. 100)	Weighted Question Score	Weighted Questionnaire Score	Consensus Score (Max. 100)	Weighted Question Score	Weighted Questionnaire Score	Consensus Score (Max. 100)	Weighted Question Score	Weighted Questionnaire Score
4. Service Delivery	40%	4.1	80%	75	60	30	50	40	24	100	50	50
		4.2	20%	75	15		100	20		75	75	
Questionnaire 4 Totals					75			60				
5. Account Management	30%	5.1	75%	100	75	26.25	50	37.5	13.13	75	37.5	15
		5.2	25%	50	12.5		25	6.25		50	12.5	
Questionnaire 5 Totals					87.5			43.75			50	
Quality Total Score						56.25			37.13			65.00



## 6. Commercial Evaluation

6.1. This section contains information on how to complete Attachment 4 - Price Schedule and the commercial evaluation process.

### 6.2. How to complete your Attachment 4 – Price Schedule

6.2.1. Read and understand the instructions in the Attachment 4 - Price Schedule, and in this section before submitting your prices.

6.2.2. Your prices should compare with the quality of your offer.

6.2.3. Your prices must be sustainable and inclusive of all costs for example your operating costs and profit.

6.2.4. Your prices are to exclude VAT.

6.2.5. Pricing is to be inclusive of expenses.

6.2.6. The currency is British pounds sterling, up to two decimal places.

6.2.7. Pricing will be based on:

- Eight (8) hour Working Day; and
- Rounded to the nearest £10.
- Zero bids will not be allowed.

6.2.8. We will investigate where we consider your bid to be abnormally low.

6.2.9. You must download and complete the Attachment 4 – Price Schedule you are submitting a bid for. Further detail may be provided within the Attachment 4 – Price Schedule.

6.2.10. When you have completed your Attachment 4 - Price Schedule, you must upload this into the e-Sourcing Suite at question Q7. If you do not upload your Attachment 4 – Price Schedule your bid may be rejected from this competition.

6.2.11. Do not alter, amend or change the format or layout of the Attachment 4 – Price Schedule.



### 6.3. Commercial Evaluation Process

- 6.3.1. This is how we will evaluate your pricing:
- 6.3.2. We will check you have completed the Attachment 4 – Price Schedule as instructed.
- 6.3.3. Failure to complete the Attachment 4 - Price Schedule as instructed may result in your bid being deemed non-compliant and it may be rejected from this competition.
- 6.3.4. The commercial evaluation will be undertaken separately to the technical evaluation process.
- 6.3.5. The Potential Bidder with the lowest total price will be awarded the maximum score available.
- 6.3.6. All other Potential Bidders will get a price score relative to the lowest total price.
- 6.3.7. The calculation we will use to evaluate your total price per element, is as follows:

$$\text{Price Score} = \frac{\text{Lowest total price}}{\text{Potential Bidder's total price}} * \text{maximum score available}$$

- 6.3.8. Please see table B below for an example of how your Price score will be calculated.

**Table B – EXAMPLE ONLY**

		Bidder A				Bidder B				Bidder C			
Questionnaire	Questionnaire Weighting %	Bid Submitted	Lowest Bid Submitted	Score	Weighted Questionnaire Score	Bid Submitted	Lowest Bid Submitted	Score	Weighted Questionnaire Score	Bid Submitted	Lowest Bid Submitted	Score	Weighted Questionnaire Score
6. Price	30	£ 217,000.00	£ 217,000.00	100.00	30.00	£432,000.00	£217,000.00	50.23	15.07	£542,000.00	£217,000.00	40.04	12.01



- 6.3.9. Where we consider any of the total price(s) you have submitted to be abnormally low will ask you to explain the price(s) you have submitted (as required in regulation 69 of the Public Contracts Regulations 2015).

## 7. Final Decision to Award

- 7.1. We will add your technical score to your commercial score to calculate your final score.
- 7.2. Please see table C below for an example of how your technical score and Price score will be added together to identify your final score.

7.3. **Table C – EXAMPLE ONLY:**

Questionnaire	Weighted Questionnaire Score		
	Bidder A	Bidder B	Bidder C
4. Service Delivery	33.20	26.40	26.60
5. Account Management	22.35	17.33	9.90
6. Price	30.00	15.07	12.01
Total Score	85.55	58.80	48.51

- 7.4. The bidder with the highest final score will be awarded the contract.

## 8. Further Information

- 8.1. We will tell you if you have been successful or unsuccessful via the e-Sourcing Suite.