



## 1 INTRODUCTION

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

## 2 OVERVIEW

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

Questionnaire Reference	Questionnaire Title
1	KEY PARTICIPATION REQUIREMENTS
2	CONFLICTS OF INTEREST
3	INFORMATION ONLY
4	QUALITY / SERVICE DELIVERY
5	SOFTWARE TRIAL (TECHNICAL)
6	PRICE

### 2.2 Quality Evaluation Process

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

2.2.2 Each response to questions within the Quality/Service Delivery Questionnaire(s) will be marked in accordance with the table below:



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

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

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

### 2.3 Consensus Marking Procedure

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

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

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

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

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

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

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



## 2.4 Price Evaluation Process

2.4.1 Prices submitted by Potential Providers' in the Price Schedule will be recorded and evaluated in accordance with the following process.

2.4.2 Potential Providers' are required to provide a completed pricing schedule against the 'Price' Questionnaire within the e-Sourcing event.

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

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

2.4.5 The calculation used is the following:

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

Potential Provider	Price Submitted	Score Calculation	Maximum Score Available	Score Awarded
Potential Provider A	£1,000	$\frac{£1,000}{£1,000} * 100$	100	100
Potential Provider B	£2,000	$\frac{£1,000}{£2,000} * 100$	100	50
Potential Provider C	£2,500	$\frac{£1,000}{£2,500} * 100$	100	40

## 2.5 Final score

2.5.1 The Quality Score will be added to the Price Score to determine the final score for each Potential Provider ("Final Score").

## 3 EVALUATION CRITERIA

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

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



- 3.3 Questionnaire 3 is for information only. Although this questionnaire does not form part of the evaluation process, Potential Providers are advised to complete it in full as any omissions could affect the award process.
- 3.4 The Authority and its Agent reserve the right to challenge any information provided in response to Questionnaire 3 and request further information in support of any statements made therein.

<b>QUESTIONNAIRE 1 – KEY PARTICIPATION REQUIREMENTS</b>			
<b>GUIDANCE</b>	The following questions are ‘Pass/Fail’ questions. If Potential Providers are unwilling or unable to answer “Yes”, their submission will be deemed non-compliant and shall be rejected. Potential Providers should confirm their answer by selecting the appropriate option from the drop down menu.		
<b>Question Number</b>	<b>Question</b>	<b>Max Score</b>	<b>Weighting (%)</b>
[1.1]	Have you read, understood and agree with Appendix A, Terms of Participation? By answering “Yes”, you are confirming your ‘Declaration of Compliance’ at Annex 1 of Appendix A, Terms of Participation.	Pass/Fail	N/A
[1.2]	Have you read, understood and accepted the Invitation to Tender and all associated appendices, specifically Appendix B, Statement of Requirements?	Pass/Fail	N/A
[1.3]	Do you agree, without caveats or limitations, that in the event that you are successful the Crown Commercial Service’s Terms and Conditions within Appendix C, will govern the provision of this contract?	Pass/Fail	N/A
[1.4]	Do you confirm your Organisation’s e-Sourcing suite profile is complete and accurate at the time of Tendering and that any amendments made following acceptance of this event will be notified to the buyer in writing?	Pass/Fail	N/A
[1.5]	Do you confirm that you can meet all the key milestones detailed within the Appendix B – Statement of Requirements?	Pass/Fail	N/A
[1.6]	Please confirm that the survey software provided can meet the minimal volumes specified within Section 10 (Volumes) of the Appendix B – Statement of Requirements.	Pass/Fail	N/A
[1.7]	Please confirm that you can meet the requirement in accordance with ISO 27001:2013.	Pass/Fail	N/A



	<b>Please confirm you have attached evidence of accredited certification at this question level</b>		
[1.8]	Please confirm that you are certified under the Cyber Essentials Scheme (both parts) or commit to obtaining certification during the period of the contract. Failure to do so could result in the contract being terminated. <b>Please confirm you have attached evidence of accredited certification at this question level.</b>	Pass/Fail	N/A
[1.9]	Please confirm your survey software will store customer data onshore (EU data centre), as outlined in the Appendix B Statement of Requirements? <b>Please confirm your data storage arrangements at this question level.</b>	Pass/Fail	N/A
[1.10]	Please confirm you are able to meet, and will abide by, the requirements of General Data Protection Regulation (GDPR) legislation?	Pass/Fail	N/A
[1.11]	Please confirm you are able to provide access to your software for the duration of the three (3) week trial period at the Evaluation Stage, as outlined in Section 6.9 of Appendix B, The Requirement? <b>Please attach access details here, i.e. log-in/key-code, at this question level.</b>	Pass/Fail	N/A
<b>QUESTIONNAIRE 2 – CONFLICTS OF INTEREST</b>			
<b>GUIDANCE</b>	Question 2.1 is a 'Yes/No' question and will dictate whether or not question 2.2 needs to be answered. Question 2.2 is a Pass / Fail question. Potential Providers are required to provide details of how the identified conflict will be mitigated. The Contracting Authority will review the mitigation in line with the perceived conflict of interest, to determine what level of risk this poses to them. Therefore if Potential Providers cannot or are unwilling to suitably demonstrate that they have suitable safeguards to mitigate any risk then their Tender will be deemed non-compliant and will be rejected.		
<b>Question Number</b>	<b>Question</b>	<b>Max Score</b>	<b>Weighting (%)</b>
[2.1]	Please confirm whether you have any potential, actual or perceived conflicts of interest that may be relevant to this requirement.	None	N/A
[2.2]	We require that any potential, actual or perceived conflicts of interest in respect of this ITT are identified in writing and that companies outline what safeguards	Pass/Fail	N/A



	would be put in place to mitigate the risk of actual or perceived conflicts arising during the delivery of these services.		
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### QUESTIONNAIRE 3 – INFORMATION ONLY

<b>GUIDANCE</b>	The following questions are for information only and do not form part of the evaluation. Information provided in response to these questions may be used in preparation of any Contract Award and any omissions may delay completion of this Tender exercise.		
Question Number	Question	Max Score	Weighting (%)
[3.1]	Please provide the name, office address, telephone number and email address for your organisations Tender point of contact.	None	N/A
[3.2]	Please confirm whether your organisation is an SME as defined within <u>EU recommendation 2003/361</u> .	None	N/A
[3.3]	Please provide details of any sub-contractors you propose to use in order to meet your obligations should you be awarded a Contract. Your response must include their; <ul style="list-style-type: none"> <li>• Trading Name(s)</li> <li>• Registered Address(es) and contact details</li> <li>• Goods/Services to be provided</li> </ul>	None	N/A
[3.4]	If you are the Lead contact for a Group of Economic Operators, please provide details of all the members of the Group. Your response must include their; <ul style="list-style-type: none"> <li>• Trading Names(s)</li> <li>• Registered address(es)</li> <li>• Duns Number(s)</li> <li>• Role/responsibility within the Group</li> </ul>	None	N/A

3.5 The following Quality/Service Delivery Questionnaires are designed to test Potential Providers' ability to deliver the requirement as set out in Appendix B, Statement of Requirements. Potential Providers *MUST* answer all Quality/Service Delivery questions.



- 3.6 Potential Providers must achieve the minimum acceptable Quality Score, as described, for each of the questions below. Only those responses which achieve the minimum acceptable Quality Score will be included in the Price Evaluation Process.
- 3.7 Where only one (1) submission is received which does not meet the minimum acceptable Quality Score, the Authority reserves the right to enter into dialogue and seek assurances regarding the delivery of the requirement.
- 3.8 Potential Providers are able to provide attachments against each question. Question text fields must be populated with detailed references to relevant attachments or sections within their attachments.
- 3.9 Potential Providers’ responses must clearly demonstrate how they propose to meet the requirements set out in the question and address each element in the order they are asked.
- 3.10 Potential Providers’ responses should be limited to, and focused on each of the component parts of the question posed. They should refrain from making generalised statements and providing information not relevant to the topic.
- 3.11 Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas including identifying key sections within responses.
- 3.12 Potential providers will be marked in accordance with the marking scheme at Section 2.
- 3.13 The page limit on attachments is set at **5 pages**. Attachments may be submitted in Microsoft Word or, PDF format and be in Arial font size 11. **(See exception to this at Question 4.1, where a stricter page limit is applicable).**

QUESTIONNAIRE 4 – QUALITY / SERVICE DELIVERY				Weighting – 20 %
<b>All Potential Providers MUST answer ALL the following questions</b>				
Question Number	Question	Minimum Acceptable Score	Maximum Available Score	Weighting [X]%
[4.1]	Please provide a brief outline of your proposed software solution, including evidence of the ability to transfer existing survey data from a previous provider.	50	100	5%



	<p><b>NB Response is to be of no more than one (1) side (page) of A4, in Arial font size 11.</b></p> <p>Any text which is in excess of this limit shall be disregarded and shall not be considered in the evaluation process.</p> <p><i><u>Guidance:</u> A detailed proposal is not required, as the solution will be assessed practically against the trial criteria in Questionnaire 5.</i></p>			
[4.2]	<p><u>Contract/Account Evidence</u></p> <p>Please provide evidence of one previous contract/account held where you have provided a survey software solution, support services and adhered to service levels as described in Appendix B, Statement of Requirements.</p> <p>Please provide references to uphold your evidence including named personnel for contact.</p>	50	100	20%
[4.3]	<p><u>Integration</u></p> <p>Please outline your approach to integrating the survey software with Crown Commercial Services' Salesforce CRM Platform within two (2) weeks of contract award, as detailed within Section 7 (Key Milestones) of the Appendix B – Statement of Requirements.</p>	50	100	30%
[4.4]	<p><u>User Access</u></p> <p>Please outline your approach to a multi-user licence and how licences can be reallocated and managed by the</p>	50	100	15%



	Authority, as detailed within section 6.6 of the Appendix B – Statement of Requirements.			
[4.5]	<u>Training</u> Please outline your approach to meeting the minimal training requirement detailed within section 6.8 of the Appendix B – Statement of Requirements.	50	100	10%
[4.6]	<u>System Downtime</u> Please outline your approach to meeting the required minimal service levels for managing system downtime detailed within section 6.4.3 of the Appendix B – Statement of Requirements.	50	100	10%
[4.7]	<u>Support &amp; Service Levels</u> Please outline your approach to meeting the required minimal service levels, as detailed within section 6.4.2, for providing support during the entire term of the contract to Crown Commercial Service’s licences users.  Please give contact details and full details of how the support is to be accessed.	50	100	10%

**5. SOFTWARE TRIAL (TECHNICAL)**

**Weighting – 50 %**

**NB No Responses are required by Suppliers for this Section – Criteria is provided for Scoring Information only.**



As part of the evaluation process, the Authority requires a trial of the Potential Provider’s software, to ensure the solution meets the requirements set out in this Appendix B Statement of Requirements.

The software trial is a mandatory requirement; Potential Provider’s bids will be deemed non-compliant if they are unable to provide trial access to their software.

The software trials will be scored against the criteria detailed below, as per Section 6 The Requirement of Appendix B Statement of Requirements.

Criteria Number	Criteria Description	Minimum Acceptable Score	Maximum Available Score	Weighting [X]%
<b>Surveys</b>				
[5.1]	Be able to provide a wide range of varied survey design and a selection of question types including matrix tables, free text and interactive graphics.	50	100	4%
[5.2]	Be able to apply CCS branding and have complete control over branding look and feel of all surveys and forms.	50	100	4%
[5.3]	Be able to amend font and text size.	50	100	4%
[5.4]	Have complete control over email templates and text.	50	100	4%
[5.5]	Create surveys with easy skip logic functionality, question conditions, branching and the ability to pre-populate with stored data from Salesforce.	50	100	4%
[5.6]	Be able to preview questions/pages of surveys during the designing of surveys.	50	100	4%
[5.7]	Allow for easy upload of multiple customer contact records.	50	100	4%



[5.8]	Be able to send surveys from CCS mailboxes addresses and URLs.	50	100	4%
[5.9]	Customers must be able to submit responses via mobile devices/interfaces and web browsers.	50	100	4%
[5.10]	Store and save partial completion of a customer's response to enable surveys to be returned to at a later date.	50	100	4%
[5.11]	The survey software must have the ability to adapt for use on websites.	50	100	4%
<b>Integration</b>				
[5.12]	Be able to integrate with Salesforce by using customers email address, contact name and other contact information to match returned responses.	50	100	4%
[5.13]	Be able to prepopulate surveys with customer information from data stored in Salesforce.	50	100	4%
[5.14]	Be able to work as a standalone product, as well as being integrated within the Salesforce CRM programme.	50	100	4%
[5.15]	Synchronise data from survey responses back into customer records in Salesforce.	50	100	4%
[5.16]	Automatically and manually trigger surveys based on multiple interactions for any action, report or workflow within Salesforce.	50	100	4%
[5.17]	Create and issue real time email alerts for specific responses.	50	100	4%
[5.18]	All responses to be fed back in real time.	50	100	4%
<b>Reporting</b>				



[5.19]	All reporting to be available in real time.	50	100	4%
[5.20]	Be able to produce reports, charts and dashboards on the data collected with export functionality.	50	100	4%
[5.21]	Be able to analyse and export all reports and dashboards in either Excel, PDF or PowerPoint.	50	100	4%
[5.22]	Be able to identify survey drop off points and response rates.	50	100	4%
[5.23]	Be able to create and tailor our own dashboards and reports within the platform.	50	100	4%
[5.24]	Ability to provide detailed text analytics.	50	100	4%
<b>Support – Assessment of Support/Help Desk Function</b>				
[5.25]	Ability to provide telephone and internet (via email) support to the Authority between the hours of 8am to 6pm, Monday to Fridays, excluding public holidays as a minimum.	50	100	4%

<b>QUESTIONNAIRE 6 – PRICE</b>		<b>Weighting – 30 %</b>
<b>GUIDANCE</b>	<p>Potential Providers must upload the price schedule at the question level on the e-Sourcing event.</p> <p>Prices should be submitted in pounds Sterling inclusive of any expenses but exclusive of VAT.</p> <p>Potential Providers will be marked in accordance with the marking scheme at Section 2.</p>	
Question Number	Question	Max Score
[5.1]	Please confirm, by selecting 'YES' that you have attached 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	100



	VAT and firm for a period of 30 days following the Deadline for Submission.	
[5.2]	Please confirm, by selecting 'YES', that you have uploaded a formal, company-headed price quote for the items, in addition to completing Appendix E- Pricing Schedule?	Information Only