

## Offer Evaluation and Scoring Policy & Guidelines

*Purpose: To obtain the tender which best meets the Council's needs & achieves value for money*

The evaluation of offers is an important part of the procurement process and also the most common cause of complaint.

European Union ("EU") Directives implemented by the *Public Contracts Regulations 2006 (SI 2006/5) ("PCR 2006")* and developing case law, determines how UK public sector bodies are able to procure goods, services or works in the UK.

The EU procurement regime aims to create a "single market" by removing all discrimination for or against bidders. Although contracts for services listed as "Part B"<sup>1</sup> are mainly excluded from *PCR 2006* other EU legislation applies as well as the Government requirement to obtain value-for-money.

Public bodies must comply with the following key principles of the EU procurement regime in all aspects of the procurement process, including the selection of bidders and the evaluation of tenders:

**Transparency:** not only in respect of disclosure and openness but also the removal of any discretion and subjectivity. An evaluation must be based on *objective* criteria that are known to Suppliers in advance of the offer and adhered to.

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<sup>1</sup> Health, education and social care are included in the "Part B" category of services

**Fairness:** the evaluation criteria and the evidence required from Suppliers must relate directly and demonstrably to the contract subject matter and applied proportionately to the stated objectives.

**Equal treatment (or non-discrimination):** all suppliers and potential suppliers must be given equal opportunity, based on identical information and criteria, and evaluated in a non-discriminatory manner.

These principles apply to all public contracts, including those which fall below the relevant thresholds in the *PCR 2006*.

## Criteria

There are two types of criteria to assess a tenderer's ability: selection and award.

### Minimum criteria

A series of questions that relates to the supplier's ability to perform any proposed requirement, such as qualifications (e.g. can they do it?) and experience. Minimum criteria may only be applied at the pre-qualification (Accreditation and Enrolment) stage in order to short-list suppliers to be invited to tender. They may not be used to assess a supplier during the award stage.

### Attributes and Profile statements

Relates to free-text questions that require free-text responses from suppliers. The supplier's response to the Profile Statements must demonstrate how they will meet the needs of the teaching/consultant requirements.

The Award criteria sets out the basis on which the contract will be awarded by measuring value-for-money, either by choosing the lowest price, or, as in this case, on the basis of MEAT ("Most Economically Advantageous Tender"), a combination of weighted scores against quality and cost.

### **Weighted Scores**

The Council has decided on the weighting split of 40% to quality and 60% to price.

The **Quality Criterion** is comprised of *Attributes* with a weighting of 5% and *Profile Statements* with a weighting of 35%.

### **Attributes and Profile Statements**

**Attributes** are features or characteristics of the requirement that are comprised of:

- *Features* (core criteria or "must haves" for the Teaching/Consultant requirement), for example, work experience with children with SEN / mental health needs. These criteria are a "pass or fail" hurdle which will filter out suppliers prior to evaluation and scoring. These are displayed as tick boxes on the system.
- *Capabilities or Skills* (preferable or "nice to haves" Teaching/Consultant requirements), for example, own transport, restraint trained for secondary aged pupils.

The Feature criterion is an essential "pass or fail hurdle". If a supplier has not passed the Feature criterion then their bid will not be evaluated by the system. Where a supplier has passed the Feature criterion, the system will score the Capabilities/Skills. The system will then apply the weighting to represent 5% of a supplier's total score.

**Profile Statements** are free-text questions which are related to an outcome. These are defined by the LBB and require free-text responses from suppliers. The supplier's response to the Profile Statements must demonstrate how they will meet the requirement.

To ensure that the evaluation and scoring of the Profile Statement is consistent the LBB will score all answers out of a set figure of ten, as shown in the table 1, to obtain the Profile Statement evaluation score. These responses are then reviewed and evaluated by the LBB and used to determine the score for each tender weighted to represent 35% of a tenderer's total score.

### **Evaluation**

The evaluation criteria must be followed to ensure that suppliers have a fair and equal opportunity of presenting the appropriate information.

### **Cost Scoring**

Providers are required to enter the Cost of the requirement. Price scores are then calculated by the system by comparing supplier's rates.

The Price Score is weighted to represent 60% of the supplier's total score.

**Total Score** is generated by the system based on the combined final Quality (Attributes & Profile Statements) and Cost weighted scores.

These scores are then used to rank all tenders in descending order (i.e. the highest score achieves rank 1 and so on.)

### Evaluation Quality Control

To ensure consistency of evaluation and scoring, regular system reports will monitor any trends so that issues can be addressed promptly.

Table 1: TABLE OF SCORES

Rating	Score	Standard	Comment
<b>FAIL</b>	0	Non-existent	Not acceptable
	1	Inadequate	Much less than acceptable, major areas of weakness
	2	Very poor	
	3	Poor	Less than acceptable, more weaknesses than strengths
	4	Weak	
<b>PASS</b>	5	Barely adequate	Acceptable, but with some minor areas of weakness
	6	Adequate	
	7	Good	Highly acceptable, strong with few weaker areas
	8	Very good	
	9	Excellent	Extremely acceptable, many strengths, no weaknesses
	10	Perfect	