

EVALUATION GUIDE AND AWARD CRITERIA

CASE REF: 566679 PROMISE PARTNERSHIP FUND 2022-2025

1. INTRODUCTION

- 1.1. The evaluation criteria will consider Quality as well as Price. Each tender will be subjected to the evaluation process outlined below. The aim of the evaluation is to select the tender which represents the Most Economically Advantageous Tender (MEAT).
- 1.2. The winning tender will be the one that achieves the highest Combined Score (providing their tender is technically compliant). The Combined Score will be determined based on the following Price/Quality Ratio:
 - Quality (Technical) 70%
 - Price (Commercial) 30%

2. EVALUATION PROCESS

Evaluation of tenders will follow this process:

2.1. SPD (Scotland) (Selection Stage)

- 2.1.1. The purpose of the Selection Stage is to allow the Scottish Ministers to assess tenderers' suitability, capacity and capability to provide the Services required under the proposed Contract. Tenderers must submit responses to each question contained in the SPD (Scotland) (Qualification Envelope in PCS-T). In assessing responses to the SPD (Scotland), a **'Pass/Fail'** score will be awarded to each question.
- 2.1.2. Only tenders that achieve a **'Pass'** for all questions in the SPD (Scotland) will proceed to the Quality and Price Analysis.

2.2. Quality Analysis

- 2.2.1. Tender responses to the Technical Award criteria questions, as outlined in Appendix A, will be used to perform the Quality Analysis.
- 2.2.2. The marks awarded will be based on the evidence contained in the tender submissions, including any relevant attachments where they have been requested in the ITT.
- 2.2.3. Each member of the Tender Evaluation Panel will evaluate each tender submission in isolation of the other evaluators.
- 2.2.4. Each evaluator will award a mark for each question between 0 and 4, in accordance with the methodology detailed in the table below:

QUALITY SCORING GUIDANCE		
Technical responses will be evaluated using the following methodology:		
Score	Definition	Description
0	Unacceptable	Nil or inadequate response. Fails to demonstrate an ability to meet the requirement.

1	Poor	Response is partially relevant but generally poor. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled.
2	Acceptable	Response is relevant and acceptable. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas.
3	Good	Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled.
4	Excellent	Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full.
Evaluators can award a score of 0, 1, 2, 3 or 4.		

2.2.5. Once each evaluator has independently evaluated each of the tender submissions, a Moderation Meeting will be held with all members of the Tender Evaluation Panel to discuss tender scores and ensure consistency of approach with regard to the Quality Analysis.

2.2.6. The moderated average of all of the Tender Evaluation Panel marks for each question will be multiplied by the relevant question weighting, to give the question weighted score.

2.2.7. Scores will be rounded to 2 decimal places

2.2.8. Quality Scores will be awarded using the following methodology:

1. Individual Question Score (expressed as a percentage) x Question Weighting x the Section Weighting = Question Weighted Score.
2. Sum of all Question Weighted Scores within a section = Total Section Weighted Score.
3. Sum of all Section Weighted Scores = Overall Quality Score for each Tenderer.

2.3. Price Analysis

2.3.1. To allow a comparison of bids Tenderers are required to complete the Pricing Schedule (Schedule 2).

2.3.2. The following methodology will be used in the commercial evaluation in the Pricing Schedule:

The lowest total tender price, determined as the Tender Sum Total following the methodology in the Pricing Schedule, will be awarded 100% of the marks available for Price. The Price Score for the remaining Tenderers will be determined by allocating a mark for each Tenderers' Tender Sum Total relative to the lowest total tender price using the formula:

$$(\text{Lowest Tender Sum Total} / \text{Tenderer's Tender Sum Total}) \times 100.$$

Scores will be rounded to 2 decimal places

Combined Score

- 2.3.3. Once both scores (Quality and Price) have been calculated, they will be added together to give the **Combined Score** for each compliant tender.
- 2.3.4. The Combined Score will be calculated by adding the Overall Quality Score and the Overall Price Score together.
- 2.3.5. Scores will be rounded to 2 decimal places.
- 2.3.6. The Tenderer who achieves the highest Combined Score will be deemed to be the successful bidder, provided their tender has been deemed to be fully compliant in all other respects.
- 2.3.7. In the event of a tie the Scottish Ministers reserves the right to appoint the Tenderer who obtains the highest technical score.

3. TENDER CLARIFICATIONS

- 3.1. Written clarifications may be required to affirm the information provided in the tender. On completion of any clarification exercise, tender responses may be rescored to take account of the clarification.

Appendix A

TECHNICAL AWARD CRITERIA		Section Weighting	Question Weighting
SECTION A: METHODOLOGY		55%	
A1	<p>The Fund Management Service will be instrumental to the work around the fund criteria and the organisation must foster and maintain a good relationship with The Promise Scotland.</p> <p>Please describe how you intend to deliver the fund management service and how you will use the required level of expertise to inform the future principles of the Fund that will support the implementation of The Promise (build and maintain relationships with organisations such as The Promise Scotland).</p> <p>Your response should include a project plan and method statement on how this service will be delivered against the period of the fund and how the roles will be fulfilled.</p>		25%
A2	<p>Please describe how you will promote the fund to ensure maximum accessibility and how you will support organisations with little previous experience of applying for funding.</p>		10%
A3	<p>Scottish Government will expect all bids to be assessed by a care experienced panel with the right level of expert advice/ support to do so. Findings as to the relative merits of each application will be discussed with the Contract Manager at the regular review meetings,</p> <p>Please describe how you will support the creation of a care experienced panel and continue this support throughout the development of the Fund Criteria and bid assessment process (Annex A) and how you will present your findings.</p>		20%
A4	<p>Please describe your approach to financial monitoring of the funds allocated and the development of robust systems for monitoring of grant conditions.</p> <p>Your response should outline the systems in place to ensure proper financial management, including robust audit processes and random financial spot checks. Please detail how you will ensure value for public funds as they relate to individual grant awards and how you would compile annual reviews taking account of organisation reports and any Scottish Government comments on progress.</p>		15%

A5	Please describe your approach to measuring the outcomes and impact of the Fund and embedding learning in the recipient organisation or collaborations.		15%
A6	Please describe your approach to financial management of the funds transferred by the Scottish Government. Your response should include a description of how you will ensure SG money is held and identified separately from all other funds held in the name of the supplier and your process for making grant payments to recipients.		10%
A7	Please describe your approach to contract management and reporting on the progress of the contract to the Scottish Government Your response should include details on how you will monitor your own performance against targets and milestones and what support and assistance projects will receive to ensure effective progress is made to achieve agreed outcomes and grant money is being used as agreed.		5%

SECTION B: STAFFING & RESOURCING	35%	
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B1.	<p>Please provide details of your experience of delivering high quality fund administration services and how this will be applied to this contract.</p> <p>Your response should include your knowledge and experience of advancing equality in the workplace and of the equality sectors and details of your experience of distributing funding on a similar scale to that of this contract to the third sector or other sectors and where this contract will fit in your overall portfolio of work.</p>		35%
B2	<p>Please provide details of the proposed delivery team including a copy of short CVs detailing how the available skills and expertise will be applied in the delivery of the contract in order to deliver high quality fund administration services.</p> <p>The response should include an organisational chart, details of the Project Manager you propose to manage this contract, their experience of managing similar contracts and a copy of their CV.</p>		35%
B3.	<p>Please provide details of your staff recruitment and retention policy and the internal systems you have in place for managing the absence of key staff and ensuring continuity of service in the event of staff absence in the delivery of this contract.</p>		15%
B4.	<p>Please provide details of your proposed Mobilisation Plan to ensure readiness to deliver against the contract requirements.</p>		15%

SECTION C: FAIR WORK FIRST		5%	
C1.	<p>The Scottish Public Sector is committed to the delivery of high quality public services, and recognises that this is critically dependent on a workforce which is well-rewarded, well-motivated, well-led, has access to appropriate opportunities for training and development, is diverse and inclusive, and can influence decision making. These factors are also important for workforce recruitment and retention, and thus continuity of service delivery. Public bodies in Scotland are committed to applying the Fair Work First criteria in their own organisation and in publicly funded supply chains. Fair Work First is the Scottish Government's policy for driving good quality and fair work in Scotland.</p> <p>Through this approach, the Scottish Government, and its public sector partners, are asking bidders to describe how they are committed to progressing towards adopting and how they intend to continue embedding the five Fair Work First criteria:</p> <ul style="list-style-type: none"> • appropriate channels for effective voice, such as trade union recognition; • investment in workforce development; • no inappropriate use of zero hours contracts; • action to tackle the gender pay gap and create a more diverse and inclusive workplace; and, • providing fair pay for workers (for example, payment of the real Living Wage). <p>In order to ensure the highest standards of service quality in this contract we expect suppliers to commit to progressing towards adopting the five Fair Work First criteria in the delivery of this contract as part of a fair and equitable employment and reward package as a route to progressing towards wider fair work practices set out in the Fair Work Framework.</p> <p>Please describe and demonstrate how you will commit to progressing towards adopting the five Fair Work First criteria for workers (including any agency or sub-contractor workers) engaged in the delivery of this contract. This should include current and planned actions that show how you will embed these practices during the lifetime of this contract. Answers should include tangible and measurable examples and should also describe how you will report on, and demonstrate progress, to the contracting authority during the lifetime of the contract. Good answers will reassure evaluators that your company is committed to progressing towards adopting the Fair Work First criteria and to progressing towards wider fair work practices set out in the Fair Work Framework for the workers engaged in the delivery of this contract and those in the supply chain working on this contract.</p>		100%

SECTION D. COMMUNITY BENEFITS		0%	
D1.	<p>The Scottish Ministers is committed to contributing to the social, economic & environmental well-being of the people of Scotland. The Scottish Ministers has five objectives that underpin its core purpose - to create a more successful country, with opportunities for all of Scotland to flourish, through increasing sustainable economic growth. Tenderers are required to present a community benefit proposal with their tender detailing how, in the event that they should be successful in winning the contract, they will address the following Community Benefit themes:</p> <ul style="list-style-type: none"> • targeted recruitment and training for “disadvantaged” persons unemployed for over 6 months; • work placement opportunities for 14- 16 year olds; • graduate placements. <p>If successful the winning tenderer(s) will discuss the content of their Community Benefit proposal and agree a plan for the delivery of the agreed community benefits which will become a condition of the contract.</p>		N/A

SECTION E	NOT USED	
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SECTION F. BUSINESS CONTINUITY AND DISASTER RECOVERY (BCDR)		5%											
<p>In addition to the above, please describe any Business Contingency and Disaster Recovery (BCDR) Plans you will put in place to ensure ongoing delivery of Services/Goods, e.g. during the COVID-19 pandemic, these maybe but not limited to:</p> <ul style="list-style-type: none"> • Supply Chain • Resources (Staff) • Deliveries • Use of IT • IT failure • Backups (on/off site servers) <p>Plans must also cover any mitigation actions you will put in place to ensure delivery. Please see table below:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 20%;">Threat</th> <th style="width: 15%;">H/M/L Risk</th> <th style="width: 15%;">H/M/L Impact</th> <th style="width: 20%;">Mitigation / Actions including timescales</th> <th style="width: 30%;">Responsible Owner</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table>		Threat	H/M/L Risk	H/M/L Impact	Mitigation / Actions including timescales	Responsible Owner							
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SECTION G. CLIMATE EMERGENCY		0%											

G1.	<p>The Climate Change (Emissions Reduction Targets) (Scotland) Act 2019, which amends the Climate Change (Scotland) Act 2009, sets targets to reduce Scotland's emissions of all greenhouse gases to net-zero by 2045 at the latest, with interim targets for reductions of at least 56% by 2020, 75% by 2030, 90% by 2040.</p> <p>The Scottish Ministers are committed to a fairer and more sustainable Scotland to support citizens now and in future generations. Responsible businesses around the world are considering their own sustainable credentials and how they can counter the climate emergency. Scottish Ministers want to do business with responsible suppliers and actively encourage all bidders, suppliers and partners in the supply chain to the Scottish public sector to collaborate in tackling these global issues together. Scottish Ministers welcome creative thinking and commitment in how to build and shape sustainable solutions and supply chains for Scotland, ensuring that a key consideration in how our supply chains are shaped includes minimising emissions, underpinning a circular economy and supporting our Carbon Management Plan.</p> <p>Please provide details of how the contract will be delivered in a way that ensures that it supports the Scottish Minister's sustainability objectives outlined above. This should include details of how the tenderer will work with the Purchaser to meet external and internal targets for reducing energy consumption, and ways in which they will reduce their carbon footprint in the delivery of this contract.</p> <p>Of particular interest for this contract are the impacts of vehicles/transport used by the resources delivering the services and disposal of electronic hardware/IT equipment.) Responses should also address the approach taken to ensure efficiency of logistics operations, the management of waste and energy efficiency in delivering the service.</p>		N/A
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ADDITIONAL QUESTIONS FOR INFORMATION PURPOSES ONLY

The following questions require a Yes/No answer and are used for statistical purposes only:

1. SCOTTISH BUSINESS PLEDGE

The Scottish Business Pledge is a Government initiative which aims for a fairer Scotland through more equality, opportunity and innovation in business. Information on this can be found at the following link:

<https://scottishbusinesspledge.scot/>

- a) Tenderers are asked to confirm if they have signed up to the Scottish Business Pledge.

YES
NO

2. LIVING WAGE

The Scottish Living Wage Accreditation Initiative and the Living Wage Foundation recognise and celebrate the responsible leadership shown by Living Wage Employers and support employers to incorporate the real Living Wage into organisational structures long term. More information can be found at the links below:

<http://scottishlivingwage.org/>
<http://www.livingwage.org.uk/>

- a) Tenderers are asked to confirm if they are accredited as a Living Wage Employer.

YES
NO

- b) Tenderers are asked to confirm whether they will pay staff that are directly involved in the delivery of services under the contract the Real Living Wage.

YES
NO

FORM OF TENDER TO THE SCOTTISH GOVERNMENT

CASE REF: 566679 PROMISE PARTNERSHIP FUND 2022-2025

*I/We the undersigned do hereby contract and agree on the acceptance of the Tender by the Scottish Ministers, to provide the services in the Specification in accordance with the Schedules, at the prices entered in the Pricing Schedule and in accordance with the Terms and Conditions for Services.

*I/We the undersigned undertake to submit a tender in accordance with the following documents:

- Instructions to Tenderers
- Specification
- Evaluation Guide and Award Criteria
- Pricing Submission
- Form of Tender
- The Terms and Conditions detailed above

*I/We agree to abide by this tender from **12.00 noon on Monday 17th January 2022**, the date fixed for receiving tenders, until the Award of Contract.

*I/We understand that the Scottish Ministers are not bound to accept the lowest or any tender and shall not be bound to use the Service Provider as a sole supplier.

*I/We understand that the service provision is expected to commence on 1st April 2022 and end on 31st March 2025 unless the Contract is terminated or extended in accordance with the Terms and Conditions of this Contract.

Signature of
Representative:

Name:

**(BLOCK
CAPITALS)**

Designation/
Role/Job Title:

Duly authorised to sign Tenders for and on behalf of:

Name of Tenderer (Organisation)

Nature of Organisation**

Address

Telephone No

(Include Area Code)

E-mail

Date

(* Delete As Appropriate)

(**It must be clearly shown whether the Tenderer is a limited liability company, statutory corporation, partnership, or single individual trading under his own name.)

Response to request for details of the total amount of Scottish Government funding given to the Corra Foundation to distribute on behalf of the Scottish Government.

Financial Year	Amount
2020-21	£4.095m
2021-22	£4m
2022-23	£4m
2023-24	£4m
Total	£16.095m