**Task Reference:**

**Scores for individual categories**



Please adjust numbers in blue to reflect weightings agreed at ITT stage

**Commercial Assessment XX%**

Compliant Tenders will be scored by the Tender Evaluation Team against the Price Criterion using the following approach

The tenderer offering the lowest technically compliant fixed price or rate shall receive score of 100

Bid's Score = 100 x (lowest total cost / bid cost)

Example:

Three bids are received. The total cost for each is:

Bid A £120,000

Bid B £124,000

Bid C £142,000

The cost score for each bid is:

Bid A = 100 x 120/120 = 100

Bid B = 100 x 120/124 = 96.8

Bid C = 100 x 120/142 = 84.5

The Contracting Authority will require an explanation of the price where an offer appears to be abnormally low and it will assess the information provided in consultation with the Tenderer. The Contracting Authority reserves the right to reject that offer upon taking into account any explanation of the offer or those parts considered to be abnormally low, together with any evidence provided and verifying the offer or those parts of the offer which are abnormally low with the Tenderer.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **0**  Major Reservations | **1**  Poor | **2**  Acceptable | **3**  Good | **4**  Excellent |
| **Cost** |  |  |  |  |  |

Commercial Assessment Comments

**Name:**

**Date:**

**Technical Assessment XX%**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Criteria** | **0**  Major Reservations | **1**  Poor | **2**  Acceptable | **3**  Good | **4**  Excellent |
|
| **Tender meets the scope and demonstrates understanding of the context and requirements** |  |  |  |  |  |
| **Structure and organisation of work proposed ensures delivery** |  |  |  |  |  |
| **Experience and knowledge of team is relevant to delivery requirements** |  |  |  |  |  |
| **Demonstration of the benefits of the contractors approach** |  |  |  |  |  |

Technical Assessment Comments This section contains the reviewer’s thoughts on each bid against each of the criteria and supports the overall evaluation.

**Name(s):**

**Date:**

**Task Reference:**

**Overall Assessment**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Commercial Assessment** | **Technical Assessment** | **Overall Assessment** | **Ranking** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**Name:**

**Date:**

**Supplier Feedback** This section is the feedback that will be sent to the contractor.

|  |  |
| --- | --- |
| **Supplier** | **Feedback Comments** |
|  |  |
|  |  |
|  |  |

**Assessors Guidance:**

1. **Technical Merit Criteria**
   1. **Tender meets the scope and demonstrates understanding of the context and requirements**

Does the tender meet the requirements set out in the proposal and the bid template?

Does the tender offer alternative approaches or suggestions above meeting the requirements? i.e. it offers potential additional value

Is the document easy to follow and written in plain English? Is the tender concise and direct?

Does the proposal demonstrate a good understanding of the technical challenges?

Does the tender refer to and understand the R&D driver and how the work underpins the R&D topic and relevance to NDA strategy?

* 1. **Structure and organisation of work proposed ensures delivery**

Is the project plan logical and meets the deliverable and milestone requirements?

Is the project team structured and resourced to maximise delivery?

Are the risks thoroughly captured and are the mitigations appropriate?

Is the proposed method over reliant upon the NDA and SLC support?

Is the size of the team appropriate to deliver the work package?

Will the proposed work package deliver what the NDA requires?

Does the proposal make effective use of the framework supplier’s wider consortium? Have they sought expertise outside the consortium, without prompting, to bolster their offering?

Is the invoicing schedule clear and proportionate?

* 1. **Experience and knowledge of the team is relevant to delivery requirements**

Does the tender use personnel with the qualifications, experience and track record to deliver the tender?

Do the pen pictures relate to the work package proposed? Has the bidder included pen pictures, tailored CVs or generic CVs?

Where appropriate, is the relative experience of the project team members consistent with the R&D driver? E.g. For maintaining key skills, does the team contain junior members supported by appropriate technical governance?

* 1. **Demonstration of the benefits of the contractors approach**

Does the bidder articulate why their approach will deliver the result required?

Does the bidder articulate why their approach is forward thinking and offers added value additional options?

Does it consider how it can be used easily among the NDA estate (as appropriate)?

Does the bidder articulate why their technical expertise adds value to informing decisions/strategy, ensuring technical governance or minimises re-invention?

Does the tender suggest how this work can be publicised to stakeholders, NDA estate or the public as appropriate?

1. **Scoring Methodology**

A consensus scoring approach is used for the final scores for the Technical assessment, i.e. the tender review team agrees on the final technical score. It is noted that this is subjective and the suggestions given here are guidance to aid agreement of interpretation.

The weighting is typically split 80% Technical – 20% Commercial, with all criteria having an equal weighting. The split and/or weighting can be altered but this must be agreed at the IR&D Board prior to the issue of the mini-tender.

Each criterion is scored in a range from 0 to 4. The interpretation of each score is shown in the following table:

|  |  |  |
| --- | --- | --- |
| **Assessment** | **Score** | **Interpretation** |
| Excellent | 4 | The bid sets out in a clear and coherent way how the ITT (mini-competition Invitation to Tender) requirements will be met and exceeded. There is compelling evidence and/or other forms of assurance that the proposal will be delivered and will exceed the ITT requirements. For example:   1. **Tender meets the scope and demonstrates understanding of the context and requirements**   The bid meets and exceeds the ITT requirements. The bidder must show exceptional understanding of the issues, technical challenges and R&D drivers and in relation to NDA strategy. The bid scope must include alternative approaches to deliver potentially added value activities with the potential benefits clearly articulated. The bid must be easy to follow, written in plain English and be concise and direct.   1. **Structure and organisation of the work proposed ensures delivery**   The bid includes a detailed, logical project plan that shows how the deliverables and milestones will be achieved and clearly demonstrates that the work package will deliver what is required. Where appropriate, the bid seeks additional partners outside the declared consortium with expertise to bolster the bid and the size of the team is structured to maximise delivery of the tasks. Risks are thoroughly documented and clearly (and unambiguously) mitigated. The bid clearly and appropriately manages NDA and SLC support and minimises the burden on them where possible. The bid includes a clear, detailed invoicing schedule.   1. **Experience and Knowledge of the team is relevant to delivery requirements**   A bid with excellent experience and knowledge will have articulated, with impactful examples, why the team will deliver and add value to the project. This includes project management as well as technical experience. The bid will differentiate itself by including skills that add value. The pen pictures/CVs are tailored, demonstrate value and expertise and are relevant to proposed work. The experience of the team may vary depending on the R&D driver stated in the ITT (Maintaining skills, informing strategy, innovation).   1. **Demonstration of the benefits of the contractors approach**   The bid is clearly forward thinking and articulates why their approach is the best way to achieve the goal. The bid offers excellent added value options and articulates why these would provide the best solution for NDA and the NDA estate. There is a clear demonstration of how the bidder’s specific technical expertise adds significant value to the bid. The bid clearly articulates, with examples, how the project output can be used among the NDA estate and provides examples of how the work can be publicised to stakeholders, NDA estate and the public (as appropriate). |
| Good | 3 | The bid demonstrates a good understanding of the ITT requirements setting out in a coherent way, how they will be met. There is credible evidence and/or other forms of assurance that demonstrate that the bid is capable of meeting the ITT requirements and that they are likely to be delivered. For example:   1. **Tender meets the scope and demonstrates understanding of the context and requirements**   The bid clearly meets the requirements set out in the ITT. The bidder must show good understanding of the issues, technical challenges and R&D drivers but might miss some minor aspects of relevance to the NDA Strategy. The bidder may suggest an alternative approach but the benefit isn’t articulated clearly. The bid should be easy to follow, written in plain English and concise and direct.   1. **Structure and organisation of the work proposed ensures delivery**   The bid is well structured and organised with minor benefits over an acceptable bid and includes a good, logical project plan. The proposed project team is resourced and structured to ensure delivery of the task. The risks are clearly captured and the majority are unambiguously mitigated. The bid appropriately manages NDA and SLC support and where possible minimises the majority of the burden on them. The bid demonstrates clearly how the work will be delivered. Some use of the wider consortium is identified and there is a clear invoicing schedule.   1. **Experience and Knowledge of the team is relevant to delivery requirements**   The bid demonstrates a strong range of skills and experience to deliver the task. The team will have demonstrated valuable or specific experience to deliver the task over an acceptable bid. The pen portraits/CVs provided are tailored and relevant to the project and R&D driver.   1. **Demonstration of the benefits of the contractors approach**   The bid articulates why the contractors approach is the best way to achieve the goal and shows some forward thinking. The bid offers some added value options over simply meeting the specification and good consideration of why these would provide the best solutions for NDA and the NDA estate. There is good articulation of how the bidder’s specific technical expertise adds value to the bid. The contractor provides explanation of how the project output can be used among the NDA estate and how the work can be publicised to stakeholders, NDA estate and the public (as appropriate). |
| Acceptable | 2 | The bid demonstrates an understanding of the ITT requirements, setting out how they will be met but there are limited gaps in evidence and/or other forms of assurance, (though none are major). The proposal would meet the ITT requirements but there are a few gaps in evidence and/or other forms of assurance. For example:   1. **Tender meets the scope and demonstrates understanding of the context and requirements**   The bid meets the requirements set out in the ITT. The bidder demonstrates an understanding of the technical challenges, scope and R&D drivers but does not fully articulate the impact on NDA strategy as set out in the ITT. The bid suggests a single approach that would potentially deliver the task and articulates some benefits. The bid document is clear, concise, written in plain English and addresses the scope of the ITT.   1. **Structure and organisation of the work proposed ensures delivery**   The bid and project team is structured and organised to simply deliver the tasks with no additional benefits or advantages. A logical plan that meets the deliverable and milestone requirements is included. The bidder has articulated why they have chosen their particular method. The risks are captured and mitigated but there are some minor gaps. The bid includes some steps (where appropriate) to minimise the burden on NDA and SLC support. There is little use of the wider consortium and a basic invoicing schedule is included.   1. **Experience and Knowledge of the team is relevant to delivery requirements**   The bid demonstrates a range of skills and experience to deliver the task. The team may have relevant, specific experience to deliver the task but may lack depth of capability or not align with the R&D driver. The pen portraits/CVs are tailored but contain basic information.   1. **Demonstration of the benefits of the contractors approach**   The bid articulates at a basic level why their approach is the best way to achieve the goal. The bid offers some added value options over simply meeting the specification and some consideration of why these provide the best solutions for NDA and the NDA estate. There is some articulation of how the bidder’s specific technical expertise adds value to the bid. The contractor provides some explanation of how the project output can be used among the NDA estate and how the work can be publicised to stakeholders, NDA estate and the public (as appropriate). |
| Poor | 1 | Meets some of the ITT requirements with a number of gaps, or a few gaps some of which are significant. The bid demonstrates some understanding of the ITT requirements. There are a number of gaps or some significant gaps in evidence meaning that there remains more than a little doubt as to whether the Bidder would be capable of substantially meeting and/or delivering the majority of the ITT requirements. For example:  **1. Tender meets the scope and demonstrates understanding of the context and requirements**  The bidder has not clearly demonstrated a good enough understanding of the issue, technical challenges, R&D driver or the scope and requirements set out in the ITT. The bid suggests a single approach for which the benefits are poorly articulated. The bid is not easy to follow, is not written in plain English and not concise and direct e.g. the bid may contain a considerable number of typos.   1. **Structure and organisation of the work proposed ensures delivery**   The bid is poorly structured and organised and difficult to follow with very limited additional benefits. The project plan is not logical or clear. There is significant doubt in the capability or method chosen to deliver the project. Risk mitigation may not be considered appropriate and/or has missed a significant risk. The bid does not appropriately manage NDA and SLC support or minimise the burden on them. There is no use of the wider consortium and no clear invoicing schedule.     1. **Experience and Knowledge of the team is relevant to delivery requirements**   The bid does not demonstrate a strong range of skills and experience to deliver the task. The team lack specific technical expertise or have significantly underestimated the requirements to fulfil a task. The skills of the team do not align with the R&D driver for the work package. Pen portraits/CVs are very generic and lacking in details and may not have been included for all the key team members.   1. **Demonstration of the benefits of the contractors approach**   The bid is not overly forward thinking. It does not clearly articulate why their approach is the best way to achieve the goal. The bid offers very limited value added options or consideration of why this would provide the best solution for the NDA and the NDA estate. There is very limited demonstration of how the bidder’s specific technical expertise adds significant value. The contractor provides very limited explanation of how the project output can be used among the NDA estate and how the work can be publicised to stakeholders, NDA estate and the public (as appropriate). |
| Major Reservations | 0 | Does not meet the requirements stated in the ITT or only meets some of them, but includes major errors and/or omissions. The bid demonstrates little or no understanding of the ITT requirements. The bid fails to set out how the stated ITT requirements will be met and/or includes major error(s) and/or omission(s). There is very little evidence or other forms of assurance that the Bidder would be capable of delivering the relevant requirements stated in the ITT.  **1. Tender meets the scope and demonstrates understanding of the context and requirements**  The bid does not meet the scope of the work set out in the ITT or only meets some of the scope, but includes major errors and/or omissions. The bid demonstrates little or no understanding of the issues, technical challenges R&D driver, impact on NDA strategy, scope and requirements set out in the ITT. The bid is not written is plain English and is not easy to follow.   1. **Structure and organisation of the work proposed ensures delivery**   The bid structure and organisation is very difficult to follow with no additional benefits. There are serious concerns regarding the capability or method chosen to deliver the project. There are major doubts as to whether the size of the proposed team would be able to deliver the required scope. Risks have not been identified or mitigated in the bid. There is no consideration of the management of NDA and SLC support or attempt to minimise the burden on them. There is no invoicing schedule or project plan.   1. **Experience and Knowledge of the team is relevant to delivery requirements**   There is very little evidence or other forms of assurance in the bid that the proposed team has the skill required to carry out the scope of work given in the ITT. For example the bid does not include Pen Portraits/CV’s for the majority of team members, and those that are provided contain very little information of relevance to proposed scope of work.  **4. Demonstration of the benefits of the contractors approach**  No information is provided in the bid regarding the benefit of the contractors approach. The bid does not articulate why the contractors approach is forward thinking and offers added value additional options. There is no demonstration of how the bidder’s specific technical expertise adds significant value. The bid does not consider how the project output can be used among the NDA estate or publicised (as appropriate).  . |
|  |  |  |

1. **Additional things to remember**

The bid may contain “optional extras” or “optional added-value extras”. These are usually outside the written scope and will be costed separately by the contractor. In order to ensure parity among the bidders, these should not be considered during the evaluation of the scope and Procurement should be requested to exclude them from any commercial assessment. The NDA Sponsor can decide to include them at a later date.

Following evaluation, each contractor should receive some feedback on the bid (page 3 of this template). The feedback is not as extensive as what is captured in the technical scoring section, i.e. the logic behind the decisions. It should say what needs improving and what was done well in the bid. Reasons for scores less than 2 should be clearly articulated.