

# Evaluation Methodology

## 1. Introduction

This section sets out the methodology that will be used to evaluate Tender submissions received for Community Advice Services.

The Contracts will be awarded to the Most Economically Advantageous Tender evaluated as described in this methodology.

The evaluation comprises of 4 stages:

- Stage One - Compliance
- Stage Two - Business Questionnaire (Appendix 1 – separate document)
- Stage Three - Quality
- Stage Four - Price

Stages 1 and 2 will be scored on a pass/fail basis. Stages three and four shall be scored; the weightings to be applied are 80% quality and 20% price. The quality and price elements contain sub weightings which are set out in this Evaluation Methodology.

## 2. The Evaluation Panel

This will be formed of the Commissioning and Voluntary Sector Support Manager, Senior Commissioning Officer and 2 other commissioning officers.

## 3. Evaluation of tenders

### Stage 1 - Compliance

Tenders will be subject to an initial compliance check to confirm that the:

- a) Tenders have been submitted on time, are completed correctly and meet the requirements of the Instructions to Tenderers.
- b) Tenders are sufficiently complete to enable them to be evaluated in accordance with this Section.
- c) Tenderer has not contravened any of the terms and conditions of the tender process.
- d) Tenderer has submitted a Tender that is capable of being accepted.

Tenders that do not meet a) – d) may be rejected at this stage.

Tenders that pass the initial screening assessment check will be subject to a detailed evaluation in accordance with the criteria and weightings set out in this document.

### Stage 2 – Business Questionnaire

The completed questionnaire (Appendix 1) will be scored on a pass/fail basis as set out in the questionnaire. The Council reserves the right to reject any tender without further consideration in the event that the tenderer fails any section of the questionnaire.

### **Stage 3 – Quality Criteria**

Tenderers will be required to submit completed Method Statement questions in accordance with this Evaluation Methodology and Appendix 2.

Tenderers for more than one service package need to complete Method Statements 1-4 for each Service Package plus the specific additional Method Statements required.

Although responses may be of a similar nature for each of the Service Packages, tenderers are required to give separate written submissions that are specific to each of the service packages. Complete a separate set of method statements for each package applied for plus the package specific method statements for each package applied for.

(1) Generalist Advice Service

- a) West Southwark
- b) East Southwark

(Successful contractors will only be awarded ONE of the areas listed above).

- (2) Specialist Level Legal Advice and Casework Services;
- (3) Advice in Community Languages.

All submissions will be scored against the same criteria/ sub criteria and sub weightings as set out in this Evaluation Methodology.

The quality criteria (weighted 80%) are split to cover all packages (60%) and package specific (20%).

<b>Quality Criteria</b>	<b>Weighting</b>		
All packages criteria	60		
Package specific criteria	A	B	C
	20	20	20
<b>Total</b>	<b>80</b>	<b>80</b>	<b>80</b>

## Quality Criteria All Packages

Criterion	Requirement or sub-criteria	Weighting	Criteria weighting	Question
<b>Service Set Up</b>	<b>Readiness</b> Approach to set up demonstrating all necessary activities will be completed to ensure service delivery will start as required.	N/A	<b>10</b>	<b>Q1</b>
<b>Systems &amp; Procedures</b>	<b>A. Management capacity to deliver services</b> Demonstrates capacity, resources and structure in place.	4	<b>18</b>	<b>2A</b>
	<b>B. Fit for purpose IT system - service delivery, contract and outcomes reporting</b> IT capabilities meet delivery standards and specification reporting requirements.	3		<b>2B</b>
	<b>C. Quality assurance arrangements</b> Effective arrangements are up to date and in place.	4		<b>2C</b>
	<b>D. Approach to customer engagement and care</b> Effective customer involvement informs and improves service satisfaction and delivery.	4		<b>2D</b>
	<b>E. Approach to recruitment, selection and training of staff</b> Ensures staff expertise is maintained to deliver advice.	3		<b>2E</b>
<b>Approach to delivery of services</b>	<b>A. Collaboration</b> Demonstrates effective working with other providers to deliver a seamless service and improve the customer experience.	3	<b>13</b>	<b>3A</b>
	<b>B. Understanding of impact and planned approach to meeting current challenges</b> Demonstrates ability and capacity to support residents with welfare reform and digital inclusion.	6		<b>3B</b>
	<b>C. Ability to provide added value through additional services</b> Demonstrates ability to offer enhanced service to residents.	4		<b>3C</b>
<b>Access to Services</b>	<b>A. Approach to providing customer access through a range of delivery methods and access channels</b> Demonstrates full range of residents' needs will be met.	9	<b>19</b>	<b>4A</b>
	<b>B. Approach to providing triage service and advice delivery in priority categories of law (1) see note below</b> Demonstrates effective methodology for diagnosis of problems and capacity to provide advice in the categories of law of greatest demand.	5		<b>4B</b>
	<b>C. Approach to providing accessible services meeting the needs of all residents</b> Demonstrates that services will be fully accessible.	5		<b>4C</b>
<b>Total</b>		<b>60</b>	<b>60</b>	

(1) **Priority categories of law**

- Generalist Advice Services: welfare benefits, debt, housing.
- Specialist Level Legal Advice Services: welfare benefits, housing, immigration & employment.
- Advice in Community Languages: information, advice and general help with advice in community languages covering priority areas of welfare benefits, debt, housing and also basic information and signposting covering the areas listed under the scope of information and advice service to be provided listed within the specification for the Southwark Advice Line.

## Quality Criteria - Package Specific

### Generalist Advice Services Only

Criterion	Requirement or sub-criteria	Weighting	Criteria weighting	Question
Improving the Service for Residents	<b>A. Approach to working with other generalist provider to provide integrated service:</b> <ul style="list-style-type: none"><li>• Telephone advice</li><li>• The web portal</li><li>• Community outreach</li></ul> Demonstrates co-ordinated approach that improves access to advice.	12	20	5A
	<b>B. Approach to early intervention and preventing legal problems from escalating</b> Demonstrates ability to identify and prioritise problems leading to early resolution.	5		5B
Lease-holders	<b>C. Approach to providing advice to Southwark Leaseholders</b> Ensures that full range of needs for independent advice are met.	3		5C

## Specialist Level Legal Advice & Casework Services Only

Criterion	Requirement or sub-criteria	Weighting	Criteria weighting	Question
<b>Improving the Service for Residents</b>	<b>A. Approach to delivery of borough wide specialist legal services</b> Demonstrates ability to provide full range of specialist level legal advice services for residents with greatest needs.	8	20	6A
	<b>B. Approach to delivery of borough wide representation service</b> Demonstrates network resources to deliver effective borough wide service in priority categories of law.	5		6B
	<b>C. Approach to early intervention and preventing legal problems from escalating</b> Demonstrates ability to identify and prioritise problems leading to early resolution.	4		6C
	<b>D. Approach to ensure that high quality specialist level advice and training is available to community organisations and other stakeholders across the borough</b> Effective engagement with community networks results in hard to reach and excluded communities accessing legal advice.	3		6D

## Advice in Community Languages Only

Criterion	Requirement or sub-criteria	Weighting	Criteria weighting	Question
<b>Capacity to offer advice in community languages</b>	<b>A. Ability and capacity to provide advice in community languages, meeting Southwark residents' needs</b> Advice is provided in residents' most needed community languages.	10	20	7A
	<b>B. Resource and approach for providing advice in community languages</b> Effective system in place to deliver advice in most needed languages.	10		7B

## Quality Scoring

Scoring of Tenderers' responses for the purposes of Quality will be based on the following scale:

Assessment	Score	Basis of score
Cannot be scored	0 points	No information provided or incapable of being taken forward either because the Supplier does not demonstrate an understanding of our requirements or because the solution is incapable of meeting our requirements.
Unsatisfactory	1 point	Although the Supplier does demonstrate an understanding of our requirements there are some major risks or omissions in relation to the proposed solution to deliver the service and we would not be confident of our requirements being met.
Satisfactory	2 points	A response which is capable of meeting our requirements but is unlikely to go beyond this.
Good	3 points	A response which shows that the Supplier demonstrates an understanding of our requirements, has a credible methodology to deliver the service and could evolve into additional benefits.
Very good	4 points	A response which shows that the Supplier demonstrates an understanding of our requirements, and has a credible methodology to deliver the service alongside a clear process and plan to deliver additional benefits and deliver value.
Excellent	5 points	A response which shows how the service can comprehensively be taken to the next level in terms of exceeding our requirements and/or offering significant added value to the Council's overall strategic requirements and objectives.

## Thresholds

Tenderers will be required to achieve a minimum satisfactory score (2) in each of the criteria sections listed in the Criteria matrix. Any tender not achieving the minimum score of 2 may be rejected. Scores will be awarded on a range from 0-5.

## Stage 4 – Price Evaluation

Tenderers are required to set out their pricing as described in Appendix 3.

The council will not consider any submission that exceeds the budget envelope set out in Appendix 3.

There are two elements to the price evaluation as shown in the table below:

Price criteria	Weighting
Total Price	10
Detail and robustness of Price submission	10
<b>Total</b>	<b>20</b>

For a) Total Price - the Tenderer with the lowest Total Price will be awarded 10 points. The lowest cost submitted will be used as the baseline for establishing the % weighting for the remaining bidders using the following formula:

The following formula will be used to evaluate the score -  $(A/B) \times C$  - where:

A = Total Price

B = Next Lowest Total Price

C = Overall Weighting for Price (10)

For B) Pricing Detail and robustness the Tenderer will be scored on the following basis:

Score	Evaluation
10	Full breakdown provided of costs along with full explanation, demonstrating that the Tenderer has given careful consideration to the factors affecting pricing and will deliver a sustainable and affordable price to the Council. High level of confidence in the breakdown provided.
7	Full breakdown provided of costs along with some explanation, demonstrating that the Tenderer has given consideration to the factors affecting pricing and should deliver a sustainable and affordable price to the Council. Medium level of confidence in the breakdown provided.
4	Some breakdown provided and some explanation provided and whilst the overall price would appear to be sustainable and affordable there may be some queries over how individual elements have been taken into account. Some confidence in the breakdown provided.
2	Some breakdown provided however limited or no explanation and concerns that the Tenderer has not given sufficient consideration to the factors affecting the price, such that there are serious concerns as to the ability of the Tenderer to fulfil the contract at this price. Low confidence in the breakdown provided through reviewing the cost of each element.
0	Failure to provide any breakdown of costs, or explanation.

The scores achieved on the two price assessments will be added together to give a total score for price.

#### 4. Abnormally Low Tenders

Notwithstanding the scoring methodology referred to above, Tenderers are advised that the Council will scrutinise very carefully any Tender that contains a Price which appears very low

(having regard, amongst other things, to the Prices submitted in the other Tenders received). The Council reserves the right to disregard/reject any tender that is abnormally low.

## **5. Final Selection and Recommendation**

Within each Service Package Tenders will be evaluated and ranked. The total Price score will be added to the total Quality score. The total score will then be used to rank the Tender submissions for each Service Package. All tenders will be ranked in accordance with their overall Total score.

Each Service Package will be awarded to the highest ranked Tender submission received for the service package.

Package A will be awarded to 2 separate contractors: one for the east and one for the west of Southwark. These will be awarded to the 2 highest ranked Tenders received for Package A. Please submit proposals for both West and East unless you are unwilling to provide services for one of the areas in which case your bid will not be considered for that area. The first placed Tenderer will be given its preference choice for the area. The second placed Tenderer that has indicated its willingness to provide services for the other area will be awarded the contract for that area. However, the council reserves the right to award contracts irrespective of preference to the two contractors that score highest.

The Leaseholder Advice element of this package will be awarded to the provider that scores the highest in the evaluation of that element. In the event of a tie in this area the contractor with the cheapest tender will be awarded this element.

## **6. Tie Break**

In the event of a Tie Break (where two or more top scoring Tenderers have the same total weighted score including both quality and price), the Council shall select from amongst those Tenderers the submission with the highest weighted score for price.

## **Appendices**

### **Appendix 1: Stage Two: Business Questionnaire**