



Evaluation Methodology

For

The Provision of Home & Community
Support and Enablement Homecare

Section 4

Strictly Private & Confidential

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1 GENERAL INFORMATION

THE PROCUREMENT

- 1.1 The London Borough of Barnet (the “Authority”) seeks to procure services to deliver Home and Community Support and Enablement Homecare. The Authority is expecting to award Contract(s) for these services prior to 31 March 2016.

OVERVIEW OF THE EVALUATION METHODOLOGY

- 1.2 This section of the tender pack details the Evaluation Methodology to be used to let Contracts for services relating to Home and Community Support and Enablement Homecare (the “Procurement”). Bidders must also refer to the Invitation to Tender for Home and Community Support and Enablement Homecare.

Bidders will be evaluated in accordance with the methodology detailed within this document. The evaluation process will be based on Most Economically Advantageous Tender (MEAT) to award Contracts to the successful Bidders.

The Authority will not re-reimburse any expenses incurred by Bidders in preparing their responses to the Procurement. The Authority reserves the right to cease the Procurement process at any time and not award and shall have no liability whether financial or otherwise towards Bidders should it do so.

OBJECTIVES OF THE EVALUATION METHODOLOGY

- 1.3 This document is designed to:
- Ensure that the evaluation process is free from bias or perceived bias and supports an open, fair and transparent procurement;
 - Describe the overall structure and process of the evaluation;
 - Detail the criteria against which the evaluation will be undertaken.

EVALUATION PANEL

- 1.4 The evaluation will be carried out by the Evaluation Panel consisting of a carefully selected range of subject matter experts across the various Authority teams relevant to this Procurement. The Evaluation Panel may draw on expertise from others including representatives from Procurement, Finance and current service users.

2 ITT EVALUATION FOR ALL PROVIDERS AND LOTS

STAGE 1 - SUBMISSION ON TIME AND ACCEPTANCE OF TERMS AND CONDITIONS

- 2.2 Bidders are advised that the submission must be submitted through the online E-Procurement Portal, “Curtis Fitch”, no later than 12 noon on 8th January 2016. The Authority reserves the right to reject or disqualify a Bidder and/or the members of the Bidder's Team if a submission is late. Bidders must also confirm acceptance of the terms and conditions of the contract according to the Tender Declaration.

Submission responses that pass Stage 1 will then be subject to Stage 2.

STAGE 2 – PASS OR FAIL EVALUATION

2.3 Stage 2 evaluation relates to all questions in sections A – M in the ITT.

The scoring criteria includes a number of pass or fail questions. Full instructions are detailed in [Annex A](#) of this document. Bidders who receive a fail for any of the pass or fail questions or fail to complete this section in full will fail Stage 2 of the evaluation and their tender will not be further evaluated.

NOTE ON ECONOMIC AND FINANCIAL STANDING AT STAGES 3 AND 4

The Authority will undertake a financial assessment of Bidders' economic and financial standing.

The focus and objective will be on:

- Assessing the risk to the Authority and/or public money which would result if a Bidder were to go out of business during the life of the contract, or have inadequate financial resources to perform the contract.
- Eliminating from the Procurement, where justified, any Bidder whose current financial capacity would pose an unacceptable risk to the Authority and/or public money.

If the financial assessment identifies such a risk, which the Authority deems unacceptable, the Authority may contact the relevant Bidder(s) to provide evidence and appropriate guarantees of how that risk will be mitigated.

The Authority will only rule out a Bidder where there is clear evidence that the Bidder's financial position places public money or services at unacceptable risk.

So, if appropriate mitigation measures are not offered and/or cannot be adequately demonstrated to the Authority's reasonable satisfaction, the Authority will inform the Bidder(s) that the Bidder(s)' tender cannot be accepted.

Questionnaire responses that pass Stage 2 will then be subject to Stage 3.

STAGE 3 – QUALIFICATION STATEMENTS

2.4 Bidders tendering for Lot One: Home and Community Support – Adults must complete sections N1 to N6a excluding N2b. Bidders tendering for Strategic Provider for Lot One must also answer question N2b and N6b.

Bidders tendering for Lot One: Home and Community Support – Family Service must complete sections N7 to N11.

Bidders tendering for Lot Two: Enablement Homecare must complete sections N12 to N17.

Bidders tendering for more than more Lot/element must complete all of the relevant sections.

The criteria for the Qualification Statements are detailed in [Annex A](#) of this document. Bidders who receive a fail for any of the pass or fail questions or fail to complete this section in full will fail Stage 3 of the evaluation and their tender will not be further evaluated.

Questionnaire responses that pass Stage 3 will then be subject to Stage 4.

STAGE 4 – METHOD STATEMENT QUESTIONS

- 2.4** The minimum standard for Bidders to pass through this stage is a score of three out of a total of five marks available per question for all questions. Bidders who fail to meet this threshold, will not have their tender further evaluated.

The Evaluation Panel will use a scoring range of between 0 and 5 to score Bidders' responses to Method Statement Questions. The assignment of a score of 0, 1, 2, 3, 4 or 5 will be based on the following assessments:

Table 1:

Score Awarded	Definitions
0	An unacceptable response: <ul style="list-style-type: none"> Information is either omitted or completely fails to address the question/requirement and/or poses an unacceptable risk to the Authority.
1	A poor response: <ul style="list-style-type: none"> Information contains significant shortcomings and/or lacks evidence of compliance with the question/requirement and/or poses a high risk to the Authority.
2	A below expectations response: <ul style="list-style-type: none"> Information has some omissions and/or only partially addresses the question/requirement and/or is inconsistent with other proposals and/or poses a significant risk to the Authority.
3	A satisfactory response that meets expectations: <ul style="list-style-type: none"> Proposal demonstrates it can meet the minimum expected standard in most material respects in terms of level of detail, accuracy and relevance.
4	A good response: <ul style="list-style-type: none"> Proposal meets the required standard and is comprehensive in terms of detail, accuracy and relevance.
5	A very good response: <ul style="list-style-type: none"> Proposal meets the required standard, is comprehensive and demonstrates best practice and/or delivers added value.

All Bidders are required to answer questions, O1 to O6.

Bidders for Lot One: Home and Community Support – Adults and/or Lot Two: Enablement Homecare must answer both questions O7 and O8.

Bidders for Lot One: Home and Community Support – Family Service must answer questions O9 to O10.

Bidders tendering for more than more Lot/element must complete all of the relevant sections.

The scoring criteria for Method Statement Questions are detailed in [Annex A](#) of this document.

Any questionnaire responses that fail Stage 4 will not be considered further. Questionnaire responses that pass Stage 4 will then be subject to the next stage of evaluation. Bidders tendering for Approved Provider status will be subject to Stage 8 evaluation. Bidders tendering for Strategic Provider status will be subject to Stage 5 and 6 evaluations.

Bidders which pass Stage 4 will be subject to the following Evaluation Weighting:

Table 2:

	Price Evaluation (Stage 8)	Further Quality		
Strategic Provider	80%	20%	Method Statement Questions in Stage 4 <i>All questions will be weighted equally.</i>	5%
			Method Statement Questions for Strategic Providers in Stage 6 <i>All will questions be weighted equally.</i>	10%
			Provider Presentation	5%
Approved Provider	100%	N/A		

3 ITT EVALUATION FOR STRATEGIC PROVIDERS

STAGE 5 – METHOD STATEMENT QUESTIONS

- 3.1 Evaluation scores from the Method Statement Questions from Stage 4 will be weighted as per 2.4, Table 2.

STAGE 6 – METHOD STATEMENT QUESTIONS FOR STRATEGIC PROVIDERS

- 3.1 Bidders are required to answer all questions in Section P.

The minimum standard for Bidders to pass through this stage is a score of three out of a total of five marks available per question for all questions. Bidders who fail to meet this threshold, will not have their tender further evaluated.

Refer to 2.4, Table 1 for the Evaluation Criteria and in [Annex A](#) for the scoring criteria for this section.

Any questionnaire responses that fail Stage 6 will not be considered further. Questionnaire responses that pass Stage 6 will then be subject to the next stage of evaluation.

STAGE 7 – STRATEGIC PROVIDER PRESENTATIONS

- 3.2 Bidders will be required to deliver a presentation to the Evaluation Panel, with times and location to be confirmed.

Refer to 2.4, Table 1 for the Evaluation Criteria that will be applied to this Stage.

4 PRICE EVALUATION

STAGE 8 – PRICE EVALUATION

- 4.1 Bidders tendering for Approved Provider status that successfully pass Stage 4 will be subject to Price Evaluation. Bidders tendering for Strategic Provider status that successfully pass Stage 6 will be subject to price evaluation. This will be weighted as set out under 2.4, Table 1.

The evaluation method will award the maximum available marks to the lowest priced tender submission, with other Bidders' scores calculated proportionately.

The lowest priced tender submission will be based on the average calculated from Bidders' submissions for "Price Per Hour" in the Pricing Schedule.

For Lot One: Home and Community Support, this will be based on the "Price Per Hour" for Year 1 and Year 2.

For Lot Two: Enablement Homecare, this will be based on the "Price Per Hour - for the first 1,000 hours per week", for Year 1, Year 2 and Year 3.

The lowest Bidder's Price submitted shall be divided by the Bidders Price, and then multiplied by the price weighting percentage and rounded up to two decimal places to give the Bidder's price score i.e.

Lowest Bidders price/ Bidders price x Price weighting.

5 RANKING AND AWARD OF CONTRACTS

STAGE 9 – RANKING AND AWARD OF CONTRACTS FOR LOT TWO: ENABLEMENT HOMECARE

- 5.1 The combination of Quality and Price, as per section 2.4, Table 2, will create the ranking order for Most Economically Advantageous Tender (MEAT).

The Bidder that is ranked 1 for Lot Two: Enablement Homecare will be awarded the contract for this service.

If this first ranked Bidder also tendered for Lot One: Home and Community Support, they will be awarded to the Approved List. This Bidder cannot be awarded Strategic Provider for Lot One: Home and Community Support.

STAGE 9 – RANKING AND AWARD OF CONTRACTS FOR LOT ONE: HOME AND COMMUNITY SUPPORT

- 5.2 The combination of Quality and Price, as per section 2.4, Table 2, will create the ranking order for Most Economically Advantageous Tender (MEAT).

Ranked Bidders for Strategic Provider 1-6 will be awarded the contracts for these services after the exclusion of the Strategic Provider for Lot Two: Enablement Homecare. Bidders 1-6 will be awarded Strategic Provider for one Locality only. Strategic Providers can be on the Approved List for other Localities.

AWARD OF STRATEGIC PROVIDERS TO LOCALITY

- 5.3 Please refer to Section A2 of the ITT. Bidders will only be considered for the Locality/ Localities which they have indicated that they could meet the service requirements for under Section A2 of the ITT.

Successful Bidders will be awarded to a Locality based on the following order subject to Section A2 of the ITT:

- 1st ranked provider – North Locality
- 2nd ranked provider – North Locality
- 3rd ranked provider – West Locality
- 4th ranked provider – West Locality
- 5th ranked provider – South Locality
- 6th ranked provider – South Locality

AWARD OF PROVIDERS TO THE APPROVED LIST

- 5.4** Only Bidders who successfully pass Stage 4 will be awarded to the Approved List. The evaluation of Bidders will be as per section 2.4, Table 2. This will create the ranking order for Most Economically Advantageous Tender (MEAT).

Annex A



Annex A