

Low Income Benefits

...Tenderers Briefing meeting

| Creating a Social Security system with dignity
and respect at its heart



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Creating a social security system with dignity and respect at its heart



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Welcome

Name	Title	Directorate
[REDACTED]	Senior Portfolio Manager	Procurement & Commercial
[REDACTED]	Portfolio Manager	Procurement & Commercial
[REDACTED]	Senior Portfolio Specialist	Procurement & Commercial
[REDACTED]	Business Architecture Delivery Manager	Social Security
[REDACTED]	Service Design Manager	Social Security
[REDACTED]	Low Income Benefits Delivery Manager	Social Security
[REDACTED]	Supplier Relationship Manager	Social Security
Andy McClintock	Chief Digital Officer	Chief Digital Office
[REDACTED]	Head of Technologies and Platforms	Chief Digital Office
[REDACTED]	Transformation Lead	Digital



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Purpose of the session

To share the vision for social security in Scotland

To share the work to date and how we work

To give you an opportunity to ask questions

Housekeeping

Agenda

Social Security Overview

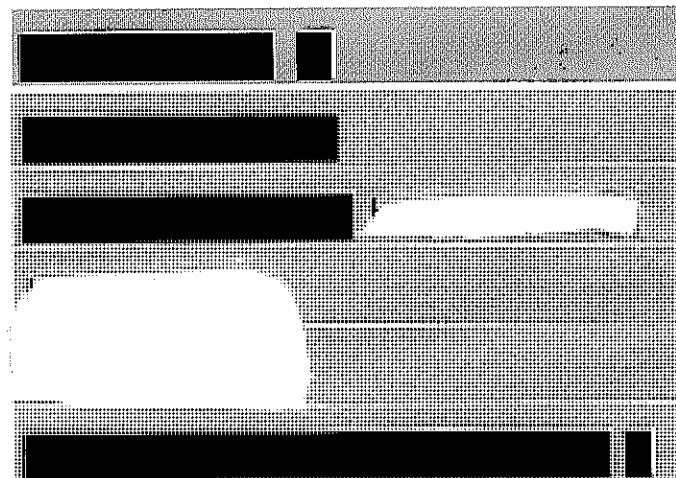
Low Income Benefits

Work to Date

How We Work

Roles & Responsibilities

Procurement



Social Security in Scotland



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Principles

1. Social security is an investment in the people of Scotland
2. Social security is itself a human right and essential to the realisation of other human rights
3. Respect for the dignity of individuals is to be at the heart of the Scottish social security system
4. The Scottish Ministers have a role in ensuring that individuals are given what they are eligible to be given under the Scottish social security system
5. The Scottish social security system is to be designed with the people of Scotland on the basis of evidence
6. Opportunities are to be sought to continuously improve the Scottish social security system in ways which put the needs of those who require assistance first
7. The Scottish social security system is to be efficient and deliver value for money



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Low Income Benefits

Best Start Grant

Funeral Expense Assistance

Other benefits/assurances

BSG BENEFIT OVERVIEW

The BSG will combine the Sure Start Maternity Grant and the Healthy Start Food Vouchers. It will provide cash payments to lower income families with children, offering financial support at key points in early years. The Healthy Start Food Scheme will be paid through a smart card provider and will protect nutritionally vulnerable families supporting them to get access to affordable and nutritious food.

Payment	Application Window	Award Amount
Maternity payment	24 weeks pregnant to 6 months after birth	<ul style="list-style-type: none">• Maternity payment for first children £600• Maternity Payment for second and subsequent children £300• Nursery Years and School Payment £250• HSV pregnancy to 3 years old at £4.25 per week ,x2 from 0-1 years old.
Nursery Payment	3 months before the second birthday to 6 months after the third birthday (tbc)	
School Payment	2 months before the normal start of school (June) until 6 months after the normal start of school	
Healthy Start	Pregnant until the child is 3 years old	

Eligibility for BSG Payments	Eligibility for BSG Healthy Start
<ul style="list-style-type: none">• Income support,• Income-based JSA,• Income-related ESA• any Tax Credit• Universal Credit• Housing Benefit• Pension Credit• Any parent under 18.	<ul style="list-style-type: none">• Income Support• Income –based JSA• Income –related ESA• Tax credits with income limits• Universal Credit (UC) - £610 per month• Housing Benefit• Pension Credit• Any pregnant woman/parent under 18

Projected Number of Payments 2019/20

Payment Type	Projected Number
Maternity payments	23,711
Nursery payments	20,600
School payments	21,300
Healthy Start payments	21,100

FUNERAL EXPENSE ASSISTANCE OVERVIEW

FEA is a payment for people on certain low income benefits who are responsible for arranging a funeral and are in a specified relationship to the deceased person. We aim to process applications within ten working days. We aim to streamline and improve on the complexities of the current application process, working with those with experience to change the parts that applicants find challenging.

Eligibility for FEA

Applicant must be in receipt of one or more of the following benefits:

- Income Support
- Income-based Jobseeker's Allowance
- Income-related Employment and Support Allowance
- Pension Credit
- Housing Benefit
- the disability or severe disability element of Working Tax Credit
- Child Tax Credit
- Universal Credit
- An application for a Funeral Expenses Payment can be made if the applicant or their partner is waiting to hear about a claim for one of the above benefits
- **Application window** – within 3 months from date of funeral (extension to 6 months is proposed)
- **New Nearest Relative Test** - Adjusted approach to reasonable responsibility test
- **Residency** - deceased ordinarily resident in UK
- applicant satisfies Scottish residency requirements

Award Amount

- Reasonable necessary costs to dispose of the body plus:
 - Additional expenses up to £700 (flat rate award is proposed, value not yet agreed)
 - Sum awarded is subject to deductions (deceased's available capital, insurance policies, pre-paid funeral provision etc.)
- Expected awards: approximately 5,600 per annum (+60% from existing provision)
- Reaches an additional 2,100 people with assistance (also taking account of widening of application window).
- Improves on the outcome for some low-income families who presently do not qualify.

Work to date

Discovery – What our agency needs to do

Alpha 1 - Case management

Alpha 2 – Application, verification, payment

Discovery (May-Sep 2016)

- User personas, user needs, user journeys
- 6 key service areas
- 58 Capabilities
- Service Pattern

Alpha (Sep-Nov 2016)

- Prototype – 6 weeks
- Testing our hypothesis (one system, multiple benefits)
- Salesforce service cloud
- 124 user stories
- 10 usability sessions

Alpha 2 (Jan-Mar 2017)

- End-to-end service development
- Options appraisals (pay, verify, cms)
- Multiple user engagement sessions
- Best Start Grant – online form
- Funeral Payments wireframe
- Change of circumstances



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Alpha 2 (Jan-Mar 2017)

- <http://scotlandsocialsecurityprototype.azurewebsites.net>



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Digital First Service Standard

Part of our assurance framework for
new services

22 criteria by which to assess the
development of a service



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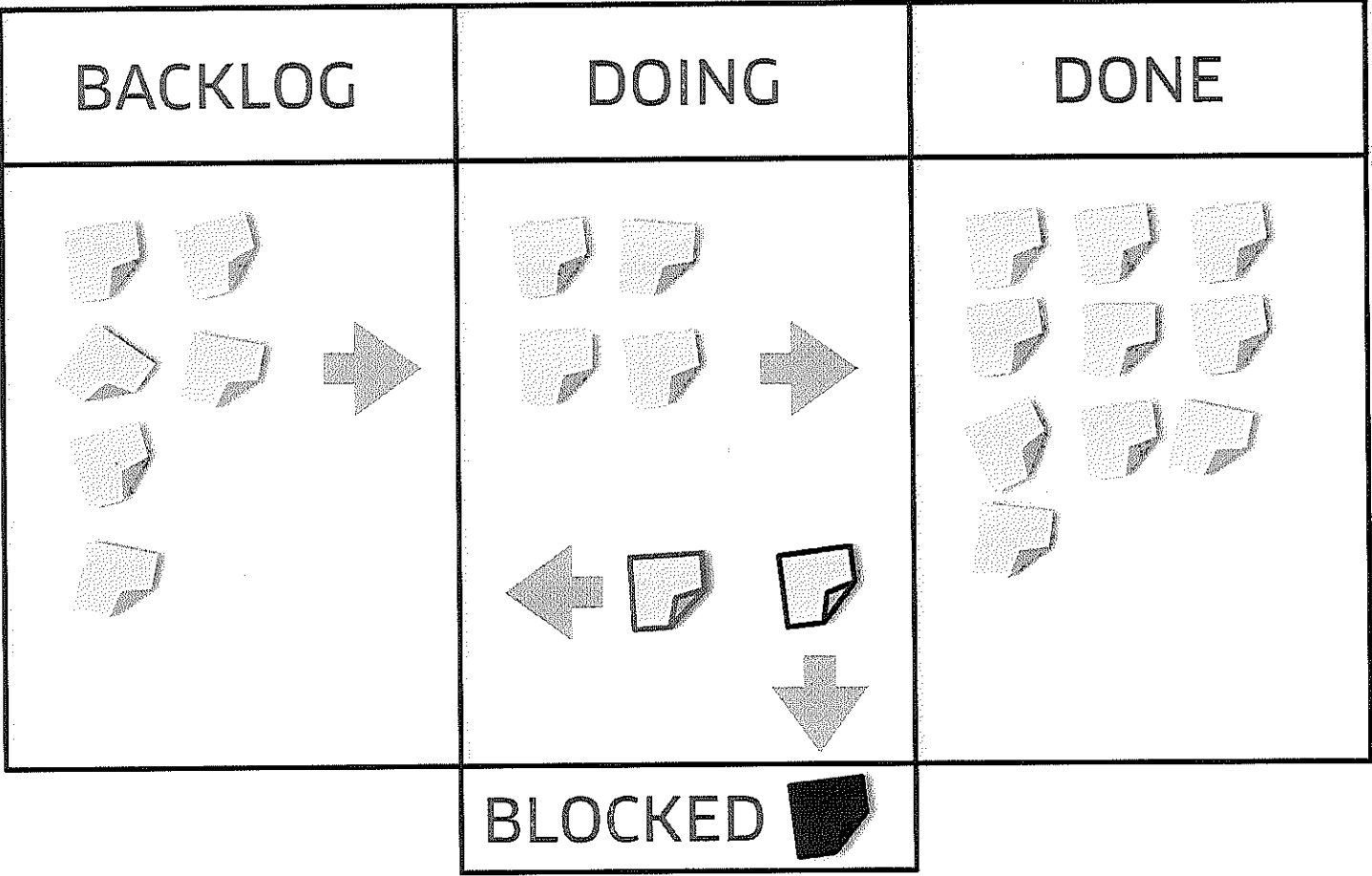
How we work

...our approach to agile



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- We start with users
- We follow a standard
- We bring people together
- We stand up every day
- We sprint, and sprint again
- We're transparent about progress



- We demo our work
- We believe that iteration is the key to success
- We test throughout
- We build services



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Roles & Responsibilities



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Scottish Government roles/disciplines, providing both assurance and resource

- Service Manager
- Product Owner
- Transformation Manager
- User Researcher
- Business Analyst
- Technical Architect
- Content Designer

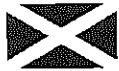
Procurement



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Timetable

Activity	Date
Questions Deadline	12:00 noon, 1 Sep 2017
Responses to ITT	12:00 noon, 12 Sep 2017
Evaluation	28 Sep 2017
Contract Award – Mobilisation Starts	13 Oct 2017
Supplier Starts	30 Oct 2017



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Public Contracts Scotland

Quick Quote function (not PCS-T).

SPCD will use the system for running the tender exercise and for dealing with all correspondence relating to the tender.

Tenderers should submit all requests for information and completed responses through the system.

All technical queries related to PCS should be directed to the Public Contracts Scotland helpdesk on 0800 222 9003



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Invitation to Tender

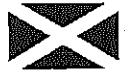
2 Year contract

Option to extend

(6 months + 20% of original
value)

Pricing

- Estimated Contract Value: £8-12M Including VAT
- Fixed Prices Excluding VAT
- Table 1: Known Requirement - 'Discovery' and 'Exit'
- Table 2: Rate Card: Table
- Table 3: Indicative Total Price – Section 9 of SoR
- Table 4: Case Study



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Evaluation and Award

Award Criteria:

Technical Competence: 65%

Cultural Fit: 5%

Commercial Response (Price): 30%

Tender Evaluation - The Evaluation Panel shall score the Technical & Cultural Fit Response. SPCD will evaluate Commercial elements

Evaluation and Award

- Suppliers must complete all sections of Schedule 2.
- Evaluation Questions are weighted.
- Read **each question carefully, give relevant answers**, complete each question in full.
- Provide clear concise responses.
- Follow the Instructions to Tenderers.
- No URL's or promotional material.

Management Arrangements

- Outlines the Key arrangements for managing the contract
 - e.g. key roles/responsibilities, meeting and reporting formats, acceptance process, etc
- Project Governance will be managed through multiple Statements of Work
- Schedule is still in draft format

Concurrent estimates for scalability?



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Estimates for 2018/19

Concurrent staff users (headcount) 18/19	
Concurrent users if applications are spread over 6 months	130
Concurrent users if 50% of applications are in first month	160
Concurrent users if 90% of applications are in first month	250

Concurrent citizen users 18/19	Lower estimate	Upper estimate
Concurrent users if applications are spread over 6 months	30	140
Concurrent users if 50% of applications are in first month	70	380
Concurrent users if 90% of applications are in first month	120	690



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Estimates for 2020/21

Total concurrent citizen users 20/21	
Total with unplanned caseload transactions at 1% of caseload every month, 40% digital channel, 0.01 Factor for concurrent users/monthly transaction	300
Total with unplanned caseload transactions at 20% of caseload every month, 90% digital channel, 0.04 Factor for concurrent users/monthly transaction	7320



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Over to you
10 mins to prepare questions?

[REDACTED]

From:

Sent:

[REDACTED]
18 September 2017 11:05

To:

Cc:

Subject:

[REDACTED]
FW: Procurement of Low Income Benefits Agile Service Design

FYI and for the audit trail:

[REDACTED] of Deloitte. [REDACTED] said (see my response in red):

I asked [REDACTED] to give us some written feedback re the above and she agreed to do so although [REDACTED] I assured [REDACTED] that feedback (good or bad) would not have a negative affect indeed we would welcome it.

[REDACTED]

[REDACTED]

Based on this discussion I understand Deloitte will not be bidding but we may get some feedback in due course

Regards

Social Security Portfolio Manager
More Powers Implementation Procurement Team
Collaborative & Scottish Government Procurement
The Scottish Government
7th Floor, 5 Atlantic Quay, 150 Broomielaw Glasgow. G2 8LU
Tel: 0141 242
Int: 20153
<http://www.scotland.gov.uk/Topics/Government/Procurement>

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From: [REDACTED]
Sent: 18 September 2017 08:51
To: [REDACTED] - Glasgow)
Cc: [REDACTED]
Subject: RE: Procurement of Low Income Benefits Agile Service Design

Hi/

Just called your mobile number and left a message. I'll be travelling to my office soon, hopefully we can chat at some point this morning.

Please try my office number first, alternatively my personnel mobile number is [REDACTED]

Regards

Social Security Portfolio Manager
More Powers Implementation Procurement Team
Collaborative & Scottish Government Procurement
The Scottish Government

7th Floor, 5 Atlantic Quay , 150 Broomielaw Glasgow. G2 8LU
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Int: 20153
<http://www.scotland.gov.uk/Topics/Government/Procurement>

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From: [REDACTED]
Sent: 15 September 2017 13:00
To: [REDACTED] (UK - Glasgow)
Cc: [REDACTED]
Subject: RE: Procurement of Low Income Benefits Agile Service Design

Hi [REDACTED],

Sorry however I'm leaving the office now and won't be available until Monday morning.

Regards

[REDACTED]
[REDACTED]
Social Security Portfolio Manager
More Powers Implementation Procurement Team
Collaborative & Scottish Government Procurement
The Scottish Government
7th Floor, 5 Atlantic Quay , 150 Broomielaw Glasgow. G2 8LU
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From: [REDACTED] (UK - Glasgow) [mailto:[REDACTED]@deloitte.co.uk]
Sent: 15 September 2017 11:08
To: [REDACTED]
Subject: RE: Procurement of Low Income Benefits Agile Service Design

Hi [REDACTED] - thanks for getting back to me.

its not a question i have, i wanted to explain that unfortunately we won't be able to submit our bid and the rationale for our decision which we have reluctantly come to.

Hence the reason i am keen to speak with you.

I'm chairing the [REDACTED] conference thismorning though so unfortunaly i can't speak till 2pm.

Are you able to speak then?

If so could you email me your mobile or please ring me on [REDACTED]

Thanks very much

Sent with BlackBerry Work
(www.blackberry.com)

From: [REDACTED]
Date: Friday, 15 Sep 2017, 09:59
To: [REDACTED]

.scot

Subject: Procurement of Low Income Benefits Agile Service Design

Hi [REDACTED]

I understand you called the Scottish Government this morning to discuss the subject opportunity which is out to tender at this moment in time.

I called [REDACTED] left a message. I called [REDACTED] they gave me your direct email address.

I understand you wish to ask a question or to state your position regarding an aspect of the requirement. In order to protect the integrity of the competition and to ensure fair and equal treatment to all suppliers invited to tender I kindly ask that you send an email, for the audit trail, to which we will respond accordingly.

Scottish Government reserves the right to make anonymous any question asked and provide all suppliers invited to tender with the anonymised question and the answer.

Regards


[REDACTED]

[REDACTED]

Social Security Portfolio Manager
More Powers Implementation Procurement Team
Collaborative & Scottish Government Procurement
The Scottish Government
7th Floor, 5 Atlantic Quay, 150 Broomielaw Glasgow, G2 8LU
Tel: 0141 [REDACTED]
Int: [REDACTED]
Mob: [REDACTED]

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Dh fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrìdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh fhaodadh nach eil beachdan anns a phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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4

From: [REDACTED]
Sent: 20 September 2017 11:01
To:
Subject: RE: Low Income Benefits Agile Service Design

Hi

Many thanks for confirming.

I couldn't access the information within PCS so appreciate you providing the reasons for withdrawing. I will contact PCS to find out where the information can be accessed.

We realise that this will be a challenging project and would like to thank you for expressing an interest and considering the opportunity. We hope that you will continue to take an interest in our future projects.

Kind regards

[REDACTED]
Tel: 0141 [REDACTED]
[REDACTED]@gov.scot

From: [REDACTED]@kainos.com]
Sent: 20 September 2017 10:06
To: [REDACTED]
Subject: RE: Low Income Benefits Agile Service Design

Hi [REDACTED] apologise that your first awareness of our withdrawal of interest was in not receiving a submission. We did actually withdraw interest on Friday 8/9/17, and I have copied the PCS confirmation email below, which includes our reasons. I hope this hasn't caused you any inconvenience and I'm more than happy to have a chat with you about this.

Regards
Jackie

From: support@publiccontractsscotland.gov.uk [<mailto:support@publiccontractsscotland.gov.uk>]
Sent: 08 September 2017 16:48
To: presales DL <presales@kainos.com>
Subject: Public Contracts Scotland - Withdraw Interest

Your registered interest in the notice detailed below has been withdrawn.

Notice ID: AUG292511
Title: Low Income Benefits Agile Service Design
Authority: Scottish Government

Reason: Good afternoon

Kainos would like to withdraw from the tendering process for the Low Income Benefits Agile Service Design project, as managed by the Public Contracts Scotland portal.

We have considered all the procurement documentation, combined with the Supplier Day briefing information and recent Q&A updates, and reached this conclusion with regret. We believe given the [REDACTED] and taking account of the timescales and scope of the delivery, we would be unable to provide a compelling proposition at this time.

We wish Scottish Government every success in this procurement cycle and look forward to opportunities to engage in the future.

[REDACTED] | Kainos | Mob: +44 (0)7800 857660 | Tel: +44 (0)28 9057 1100 | Fax: +44 (0)28 9057 1101
[REDACTED]@kainos.com



From: [REDACTED]@gov.scot [mailto:[REDACTED]@gov.scot]
Sent: 20 September 2017 09:27
To: presales DL <presales@kainos.com>
Subject: Low Income Benefits Agile Service Design

Dear Sir/Madam

Thank you for your recent interest in the above project.

We note that a tender submission was not received by the deadline yesterday.

For our audit purposes and to help us improve our processes, would you please be able to let us know why you decided not to submit on this occasion?

Kind regards

[REDACTED]

[REDACTED] MCIPS
Senior Portfolio Specialist
More Powers Implementation Procurement Team
Collaborative & Scottish Government Procurement Division
The Scottish Government, 5 Atlantic Quay, 150 Broomielaw, Glasgow G2 8LU
Tel: 0141 [REDACTED]
[REDACTED]@gov.scot
www.scotland.gov.uk/procurement

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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[REDACTED]

From: J/ [REDACTED] <[REDACTED]@uk.ibm.com>
Sent: 28 September 2017 11:32
To: [REDACTED]
Cc: [REDACTED]
Subject: RE: FW: Low Income Benefits - Clarification

Hi [REDACTED]

Thanks for your question, please see our response below. If you have any further clarification, please don't hesitate to contact me.

Our proposed use of [REDACTED] is based on [REDACTED] to Scottish user needs. We will use the latest [REDACTED] which allows us to access the latest product features and enhancements. Starting with an [REDACTED] provides a solution which remains flexible and adaptable to encompass specific Scottish Government requirements and is not constrained by [REDACTED]. However, throughout the lifecycle of the project, we will use our experience of [REDACTED] processes, systems and [REDACTED] to assess where there are opportunities to [REDACTED] developed [REDACTED], which will accelerate delivery and reduce risk for Scottish Government. For example, we believe it will be advantageous to take the [REDACTED], but will integrate this to support the specific business logic that we will be working with you and your teams to define and to deliver.

- Regards,

IBM Global Business Services

Extension: [REDACTED]
Mobile: [REDACTED]

Upcoming Leave:

----- Original message -----

From: <[REDACTED]@gov.scot>
To: <[REDACTED]@uk.ibm.com>
Cc: <[REDACTED]@uk.ibm.com>
Subject: RE: FW: Low Income Benefits - Clarification
Date: Thu, Sep 28, 2017 10:47 AM

Many thanks

Kind regards

[REDACTED]

[REDACTED]

Tel: 0141 [REDACTED]

[REDACTED]@gov.scot

From: [REDACTED] [REDACTED]@uk.ibm.com]
Sent: 28 September 2017 10:45
To: [REDACTED]
Cc: [REDACTED]
Subject: Re: FW: Low Income Benefits - Clarification

Thanks [REDACTED] confirmation that we have received the question and we will work to have a response back to you within an hour. Thanks

Regards,

IBM Global Business Services

Extension: [REDACTED]

Mobile: [REDACTED]

Upcoming Leave:

----- Original message -----

From: [REDACTED]@gov.scot>
To: <[REDACTED]@uk.ibm.com>
Cc: [REDACTED]@uk.ibm.com>
Subject: FW: Low Income Benefits - Clarification
Date: Thu, Sep 28, 2017 10:38 AM

Hi Mark

Please see below. Apologies as I should have copied you to this.

Kind regards

[REDACTED]

[REDACTED]
Tel: 0141 [REDACTED]

[REDACTED]@gov.scot

From: [REDACTED]
Sent: 28 September 2017 10:33
To: [REDACTED]
Subject: Low Income Benefits - Clarification

Dear [REDACTED]

Without commitment and without prejudice to the terms and conditions of the contract we would like to ask for clarification on the point below. Please note that this email should not be taken as an indication of the eventual outcome of the evaluation process.

Please clarify if the proposed use of [REDACTED] based on the [REDACTED] or are you proposing to use the [REDACTED] to Scottish user needs. Please also confirm if you propose to use [REDACTED]

We will look forward to hearing from you. Please note that we expect there to be a further question within about an hour. We will let you know when no further clarification will be required.

Kind regards

[REDACTED]

[REDACTED] MCIPS

Senior Portfolio Specialist

More Powers Implementation Procurement Team
Collaborative & Scottish Government Procurement Division

The Scottish Government, 5 Atlantic Quay, 150 Broomielaw, Glasgow G2 8LU

Tel: [REDACTED]

[REDACTED]@gov.scot

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Dh'fhaodadh gum bi teachdaireachd sam bith bho Riaghaltas na h-Alba air a chlàradh neo air a sgrùdadh airson dearbhadh gu bheil an siostam ag obair gu h-èifeachdach neo airson adhbhar laghail eile. Dh'fhaodadh nach eil beachdan anns a' phost-d seo co-ionann ri beachdan Riaghaltas na h-Alba.

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Insert Supplier's names in the cells below

- 1 Start by entering the Supplier's name for each tender received in column L. Type over the existing content and the Price Criteria, Quality Criteria and Combined worksheets will be updated automatically.
- 2 The criteria, sub-criteria and associated weightings used to evaluate tenders must be included in the contract notice or tender documentation. Weightings applied at all levels must total 100.
- 3 In all three worksheets data should only be entered into yellow cells, all other cells will be populated automatically.
- 4 Enter the criteria, sub-criteria and associated weightings for Quality in the Quality Criteria worksheet.
- 5 Enter the criteria and overall weighting for Price in the Price Criteria worksheet. The example provided allows for operating and running costs as well as end of life costs. If this is not applicable to your project these rows can be left blank.
- 6 Actual quoted costs should be inserted into the Price Criteria worksheet.
- 7 The score entered into the Quality Criteria worksheet will be the final scores from the pre-defined evaluation process agreed with your evaluators and shared with the suppliers in the tender documentation.
- 8 In the Price & Quality Combined worksheet there is the option to include quality thresholds which have to be attained.
- 9 You can add additional suppliers by inserting the appropriate number of columns in each worksheet and copying the formula from existing columns. Start by inserting the changes on the Price and Quality worksheets then amend the Combined worksheet. Add additional names under the list provided opposite.

[illegible]

Please note you should only type in yellow cells. Type shown in *italics* is for illustration purposes.
Actual criteria, weightings and data will vary from project to project.
Additional tenders can be added by inserting **THREE** columns per submission between existing tenders e.g. Tender 1 and Tender 2 and copying the formula. Repeat in both the Quality Criteria and the Price and Quality Combined worksheets.

Project Weighting for Price

30%

Enter Tenderer's name on Instructions worksheet

Price		IBM UK Ltd		PA Consulting		Tenderer's name		Tenderer's name	
Example Price Criteria/ Cost of Ownership									
Total Cost Score									
		No of years	Annual Cost	No of years	0.00	No of years	£0.00	No of years	£0.00
Owning/Operating/Recurrent Costs									
Maintenance									
Spares									
Energy/Fuel Consumption									
Upgrade Costs									
Consumables									
	Annual Cost x No of years		£0.00		£0.00		£0.00		£0.00
Section Total									
End of Life/Disposal/Exit									
Disposal/Exit Costs									
Less Residual Value									
Section Total			£0.00		£0.00		£0.00		£0.00
Total Price					£0.00		£0.00		£0.00

N.B. For recurrent costs insert the number of years applicable to the goods and provision of service.

Remember that it may differ from tender to tender e.g. extended warranty will reduce the number of years maintenance is required.

If you insert rows within each section the formula should update automatically but if you add the row at the bottom of each section you will have to amend the formula manually to include the scores for the inserted row(s).

Price (Weighting 30%)	Sub_Criteria	Sub Criteria Weighting %	Section Weighting %	IBM	PA Consulting
Price Section					
1. Rate Card			40.00%		
	2.1 Scrum Master	9.50%			
	Weighted Sub-Criteria Score				
	2.2 Lead Consultant	5.00%			
	Weighted Sub-Criteria Score				
	2.3 User Researcher	9.50%			
	Weighted Sub-Criteria Score				
	2.4 Business Analyst	9.50%			
	Weighted Sub-Criteria Score				
	2.5 Technical Architect	9.50%			
	Weighted Sub-Criteria Score				
	2.6 UX Designer	9.50%			
	Weighted Sub-Criteria Score				
	2.7 Content Designer	9.50%			
	Weighted Sub-Criteria Score				
	2.8 Software Developer	9.50%			
	Weighted Sub-Criteria Score				
	2.9 Test Analyst	9.50%			
	Weighted Sub-Criteria Score				
	2.10 Data Architect	9.50%			
	Weighted Sub-Criteria Score				
	2.11 Security Lead	9.50%			
	Weighted Sub-Criteria Score				
1. Rate Card Weighted Section Score					
2. Total Maximum Price			50.00%		
2. Weighted Section Score					
3. Case Study			10.00%		
3. Weighted Section Score					
Total Sections Score				87.69	86.84

Tender 2 and copying the formula. Repeat in both the Price and the Price and Quality Combined worksheets.

Project Weighting for Technical
Project Weighting for Cultural Fit

65%

5%

Enter Tenderer's name on Instructions worksheet

Technical Competence				IBM UK Ltd				PA Consulting			
	Example of Quality Criteria	Section Weighting %	Question Weighting	Score (out of 4)	Score as a percentage	Question Weighted Score	Section Weighted Score	Score (out of 4)	Score as a percentage	Question Weighted Score	Section Weighted Score
	Technical Competence	100%					65.75				50.90
* Q1	Service Delivery 30%		30%			19.50				16.50	
* Q2	The Team 10%		10%			6.00				4.50	
* Q3	Understanding of the Requirement 10%		10%			6.50				5.00	
* Q4	Solutions – System Quality Attributes 10%		10%			8.50				4.50	
* Q5	Alpha Scenario 5%		5%			2.75				3.00	
* Q6	User Research, Engagement & Developing User Focused Services 5%		5%			2.50				3.00	
* Q7	Indicative Technical Architecture 5%		5%			3.00				2.25	
* Q8	Business Continuity and Disaster Recovery 5%		5%			3.25				2.25	
* Q9	Operational Support Model 5%		5%			3.75				2.25	
* Q10	Risks, Constraints, Conflicts of Interest 4%		4%			2.00				2.20	
* Q11	Transition 3%		3%			2.25				1.20	
* Q12	Data Management 3%		3%			2.10				1.35	
* Q13	Hosting Proposals(s) 3%		3%			1.95				1.50	
* Q14a	Community Benefits 2%		2%			1.70				1.40	
* Q14b	Community Benefits 0%					0.00				0.00	
	Cultural Fit	100%					67.00				58.00
* Q1	Continuity of Service		40%			26.00				24.00	
* Q2	Fair Work		40%			26.00				22.00	
* Q3	Approach to working with Clients with Mixed Range Agile Technical Expertise/Experience		20%			15.00				12.00	

N.B Weightings must total 100 for all the section and all the questions per section

N.B. If you insert rows within each section the formula should update automatically but if you add the row at the bottom of each section you will have to amend the formula manually to include the scores for the inserted row(s).

Procurement Journey

Tender Evaluation Template

Enter Tenderer's name on Instructions worksheet

Please note you should only type in yellow cells. Type shown in italics is for illustration purposes.

Actual criteria, weightings and data will vary from project to project.

Additional Tenders can be added by inserting THREE columns per tender and copying formula from an existing tender. Add the tenders to the Price Criteria and Quality Criteria worksheets FIRST and align new entries across ALL three worksheets.

Procurement title:	<i>Low Income Benefits Agile Service Design</i>		Members of Evaluation Team:		Technical: <i>Lisa Baron-Broadhurst, Andy McClintock</i> , Commercial: <i>[REDACTED]</i>			
Project Technical weighting (%):	65%		Overall Quality Threshold (optional):		0		PA Consulting	
Project Cultural Fit Weighting (%):	5%							
Project price weighting (%):	30%							
QUALITY SCORES			IBM UK Ltd					
Example Technical & Quality Criteria	Individual Quality Threshold (optional)	Section Criteria Weight	Quality Threshold reached?		Section Weighted Score	Quality Threshold reached?		Section Weighted Score
Technical Competence	0	100%	Yes		65.75	Yes		50.90
Cultural Fit	0	100%	Yes		67.00	Yes		58.00
	0	0%	Yes		0.00	Yes		0.00
	0	0%	Yes		0.00	Yes		0.00
	0	0%	Yes		0.00	Yes		0.00
	0	0%	Yes		0.00	Yes		0.00
	0	0%	Yes		0.00	Yes		0.00
Tech - Cultural Fit Totals (MUST EQUAL 200%)		200%			132.75			108.90
Is overall quality threshold reached?					Yes			Yes
PRICE SCORES			IBM UK Ltd price score =		PA Consulting price score =			
Tender price (whole life costs)								
Lowest Cost (highest score)			37.69		0			
Weighted Price score			37.69		0			
Weighted Technical Score			65% x 65.8 =		55% x 50.9 =			
Weighted Cultural Fit Score			5% x 67.0 =		5% x 58.0 =			
Project price weighting x price score			30% x 100.0 =		30% x 0.0 =			
Overall score			76.09		35.99			
Order of tenders (ranking)			1		2			
Comments								
Signed by members of the Tender Board (for file copy)					Date			

N.B. The scoring methodology for Quality built into this matrix is 0-4, if you decide to use another scale the formula in cells G16 to G22 for Tender 1 and the equivalent cells for all other tenders must be amended accordingly.

The Evaluation Matrix pricing is scored relatively to the best price whereas quality is scored individually i.e. not relatively.