

Procurement Document

(Open Tender Procedure)

Tender for

Dorset Business Support Service, funded by UK
Shared Prosperity Fund

Reference DN728813

21st June 2024

| | |
|--------------------------|---|
| Tender Response Deadline | 14:00 hours on 24 th July 2024 |
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Introduction

Purpose

The purpose of this document is to provide instructions on the response to the Invitation to Tender (“ITT”), known as the “Tender”.

The Invitation to Tender enables Dorset Council to receive sufficient information from Organisations (“Tenderers”) which are interested in supplying the required Goods, Services or Works and to allow: a) both the assessment of their capacity and suitability, and b) enable the Council to evaluate the Tenders submitted to find the most suitable Tenderer who can meet the Specification and provide best value competitiveness of price.

The Tender has been issued by Dorset Council under a competitive procurement in accordance with the Open Procedure under the Public Contracts Regulations 2015 (“the Regulations”).

Title of Tender Opportunity: Dorset Business Support Service, funded by UK Shared Prosperity Fund

Project Scope:

Dorset Council seeks to procure delivery of a Business Support service funded by the UK Shared Prosperity Fund. The Support comprises providing relevant information, guidance and advice to local businesses at all stages including pre-start, and providing Dorset Council with assessment, evaluation and recommendations to award business grants funded by UKSPF.

This is an estimated 7-month contract with an end date of 31 March 2025.

Mitigating Fraud and Corruption Risks

Public sector commercial activity can be attractive to organised criminals. It is therefore important for the Council to consider risk of fraud and corruption when commissioning and procuring goods, works and services. Effective management of risk in these areas are part of being a risk-aware council, that manages its resources efficiently to secure value for money outcomes. The Ministry of Housing, Communities and Local Government (MHCLG) defined such fraud and corruption as:

“.... any fraudulent or corrupt activity occurring within the entire procurement lifecycle, from decision to procure through to the conclusion of the contract and including all purchasing with a value below the level of a formal tender process. This will therefore include commissioning, contract management and purchasing, as well as the tendering process itself”. <https://www.local.gov.uk/review-risks-fraud-and-corruption-local-government-procurement>

The Council mitigates the risk of fraud and corruption using various tools, which includes before any contract award carrying out checks that will involve sharing personal and organisational information with fraud prevention agencies who will use it to prevent fraud and money-laundering and to verify identity. If fraud is detected, individuals or organisations could be refused certain services, finance, or employment. Further details on how information will be used by the Council, fraud prevention agencies, and data protection rights is available on [Cifas].

The Council takes any fraud and corruption very seriously. Any suspected fraud or corruption must be brought to the attention of the Commercial & Procurement at the Council in the first instance, who will refer to Legal Services for guidance, investigation, or action with the appropriate authorities. Alternatively, issues can be raised via the Council’s whistleblowing policy (see tender condition 14.2).

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Data Protection Legislation

Where the services require the successful Tenderer to process or share personal data, the contract will be subject to the Data Protection Act 2018, incorporating the UK GDPR as set out therein and the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426).

The successful Tenderer must be familiar with all data protection legislation applicable within the UK, including their obligations as a data processor or controller, and will have all necessary systems and processes in place to ensure compliance. Guidance from the Information Commissioner's Offices is available here: [Guide to Data Protection | ICO](#)

If the service is likely to result in a high data risk for individuals, the Council may be required to conduct a Data Protection Impact Assessment after contract/framework award but prior to any processing taking place. The successful Tenderer must co-operate with this process as required.

The Council will liaise with the winning Tenderer to complete the data processing schedule which will form part of the contract agreement entered into.

Information Governance

Information is one of the core assets of Dorset Council and is vital for the delivery of quality services and the efficient management of resources. The Council's [Information Governance Policy 2024](#) outlines the strategic framework of individual responsibilities, accountable roles, governance group, and co-operation between information-related professionals, to build a culture that values information assets.

Notes for Completion

1. Glossary

- 1.1. **“Commercial & Procurement”** means the central procurement team of Dorset Council;
- 1.2. **‘Contractor’** means the person, firm or company appointed by the Council or Contracting Body to supply the Goods, Services or Works under a Contract and shall include the Contractor's employees, volunteers, sub-contractors, personal representatives, successors and permitted assigns;
- 1.3. **‘Council’** means Dorset Council;
- 1.4. **‘Contract’** means the written agreement between the Council or Contracting Body with the Contractor consisting of the clauses within the terms and conditions of the contract and any purchase order and all contract documents referred to therein;
- 1.5. **“e-tender system”** means the electronic tender system named Pro-Contract. It is provided by Proactis and is hosted via <https://www.supplyingthesouthwest.org.uk>
- 1.6. **‘Invitation to Tender’** means the Tender process and all its components, inviting tenders for goods, services, or works for inclusion within a Contract;
- 1.7. **‘Offer’** means the offer made / tendered by the Tenderer in relation to the proposed Contract;
- 1.8. **‘Specification’** means the scope of the goods, services or works to be provided pursuant to the Contract;
- 1.9. **‘Tenderer or Tenderers’** means a Contractor submitting a tender to the Council for the Contract.

2. E-Tender System

- 2.1. Assistance in relation to the e-tender system is available to Tenderers via the Supplier Help Icon within the system.
- 2.2. Supplier Guidance documents are also available to view and download.

3. To View this Opportunity

- 3.1. To view the Tender (ITT) Information in detail click on the opportunity title within the ‘My activities’ section. Click ‘start’, you can now view all the documents relevant to that opportunity.

4. Register Intent

- 4.1. Tenderers are able to click on “Register Intent” which will inform the Council of your intention to respond to this opportunity.
- 4.2. If a Tenderer does not wish to or is unable to submit a Tender and is not interested in proceeding, then they are required to click on 'No longer wish to respond' to decline the opportunity.

5. Response Wizard

- 5.1. After registering intent, Tenderers may then proceed to respond to the on-line questions.
- 5.2. To start the response Tenderers are required to click 'Start My Response'.

6. Confidentiality

- 6.1. This Tender process, including all documentation, must be treated as private and confidential. Tenderers must not disclose the fact that they have been invited to complete a Tender or release its details other than on an 'In Confidence' basis to those whom they need to consult for the purpose of preparing the Tender response, such as professional advisors or partner organisations for joint applications or consortia partners.
- 6.2. The Tender shall not be canvassed for acceptance or discussed with the media, any other organisation, member/officer of Dorset Council, or their representatives.

7. Preparation of Tender

- 7.1. If the Council issues an amendment to the original Tender process, an extension of the closing date may, at the sole discretion, of the Council be given to all Tenderers.
- 7.2. Tenderers must obtain for themselves all information necessary for the preparation of their Tender response and all costs, expenses and liabilities incurred by the Tender in connection with the preparation and submission of the Tender shall be borne by the Tenderer, whether or not their bid is successful.
- 7.3. It is the Tenderer's responsibility to ensure that they obtain the legal and specialist advice required to ensure they submit a compliant and complete Tender response, and they will be deemed by the Council to have done so.
- 7.4. Information supplied to the Tenderer by Council staff or contained in Council publications is supplied only for general guidance in the preparation of the Tender.
- 7.5. Tenderers must satisfy themselves as to the accuracy of any such information and no responsibility is accepted by the Council for any loss or damage of whatever kind and howsoever caused arising from the use by Tenderers of such information.
- 7.6. Responses to each Tender question should be written concisely and clearly answering the question posed, in English.
- 7.7. It is the Tenderer's responsibility to ensure that they directly answer the questions in the place where an answer is required. The Council reserves the right to not evaluate any response or documentation submitted elsewhere by Tenderers in the e-tender system; only direct answers to the questions in the place required will be evaluated.
- 7.8. Use of Artificial Intelligence (AI) Tools: AI tools can be used to improve the efficiency of an organisation's Tender writing process however use of AI may also introduce an increased risk of misleading statements via 'hallucination'. Tenderers are required to advise the Council whether they have used AI or machine learning tools, including larger language models, to assist in any part of their Tender submission and to confirm they have been checked and verified for accuracy.
- 7.9. Refer to [Supplier resources and top tips for tendering - Dorset Council](#)

8. Communication

- 8.1. All contact during this procurement must be submitted in writing through the e-tender system.
- 8.2. Tenderers must seek to clarify any points of doubt or difficulty via the e-tender no later than **midnight 17/07/2024**, to enable the Council to respond to all Tenderers. It is not acceptable for Tenderers to seek clarifications via telephone or e-mail outside of the e-tender system.
- 8.3. Where the Council considers any question or request for clarification to be of material significance it may communicate both the query and the response, in a suitably anonymous form, to all interested parties. Tenderers should therefore not include within the question placed their organisation's name and any potentially commercially sensitive information.

9. Price Schedule(s)

- 9.1. The Council requires Tenderers to complete and upload a Price Schedule(s) where requested to do so within the e-tender system.

10. Other Documents or Supporting Evidence

- 10.1. As instructed to do so within the e-tender system, the Tenderer must complete and upload other documentation that may need to be provided with this Tender process, or upload evidence to support their Tender submission.

11. Submission of Tender

- 11.1. Tenderers are required to submit their Tender within the e-tender system **by 14:00 on 24/7/24.**
- 11.2. Tenderers are advised to allow sufficient time to complete questions and upload documentation to the e-tender system, where requested to do so.
- 11.3. **It is the Tenderer's responsibility to ensure that the Tender is submitted within the e-tender system by the closing date and time.**
- 11.4. **Failure** to complete the Tender within the e-tender system will result in the Council rejecting the Tender as a Fail / Non-compliant bid.
- 11.5. **Failure** to complete and upload any required documentation within the e-tender system will result in the Council rejecting the Tender as a Fail / Non-compliant bid.
- 11.6. **Late Tender Submissions:** Tenders received after the closing date will not be considered.
- 11.7. The Council is under no obligation to consider partial or qualified submissions.
- 11.8. The information supplied in response to the Tender will be checked for completeness and compliance before responses are evaluated. The Council expressly reserves the right to require a Tenderer to provide additional information supplementing or clarifying any of the information provided in response to the requests set out in the Tender. However, the Council is not obliged to make such requests.

12. Tender Validation Period

- 12.1. All Tenderers shall keep their Tender Valid and open for acceptance by the Council for a period of 30 calendar days from the date of submission of tender.

13. Award Process

In this section "Regulation" or "Regulations" means The Public Contracts Regulations 2015.

- 13.1. The Council anticipates making an award for the Contract within 30 days of the closing date for the submission of tenders. The Council may, if necessary, at its absolute discretion, extend the period for completing the award process.
 - 13.1.1. Tenderers should note that the Council reserves the right to terminate this tender procedure without any decision to award.
- 13.2. The decision to award will be on the basis of the criteria as specified in this Procurement Document and in accordance with the Regulations.
- 13.3. Once the Council has decided on the award of the Contract all Tenderer(s) will receive an award decision notice in writing pursuant to Regulation 55.
- 13.4. The Council will apply a 10-day standstill period in accordance with Regulation 87.
- 13.5. The standstill period applies from the date the Council issues, by electronic means, to all Tenderer(s) the award decision notice in accordance with Regulation 86 which will set out:
 - 13.5.1. The criteria for the award of the Contract or Framework Agreement;

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- 13.5.2. the reasons for the decision including the characteristics and relative advantages of the successful tender and the scores of the addressee's tender and the winning tender.
- 13.5.3. a precise statement of when the standstill period is expected to end.
- 13.6. The purpose of the standstill period is to enable Tenderers to review and digest the award decision, and if required to seek further debrief material. Such requests must be made via the e-tender system.
- 13.7. The Council has a duty to comply with the Regulations and the enforcement of an actionable breach of this duty shall be through High Court proceedings in accordance with Regulation 91. Chapter 6 – Regulations 88 to 104 further refers.
 - 13.7.1. If court proceedings are not commenced during the standstill period, the Council will enter into the contract at the end of the standstill period.
 - 13.7.2. If court proceedings are commenced during the standstill period, the contract-making shall automatically be suspended in accordance with Regulation 95.
 - 13.7.3. Legal communication in respect of a challenge to an award decision shall be addressed to the Head of Legal Services, Dorset Council, County Hall, Colliton Park, Dorchester, DT1 1XJ.
- 13.8. Upon the Council giving notice of acceptance of the Tender and award, the Contract shall be deemed entered into and become legally binding on the successful Tenderer and the Council. The Tenderer shall, upon request of the Council, execute the Contract in the form contained in this Tender document which will include details of the Tender as accepted.
 - 13.8.1. Tenderers must not undertake the supply of any goods, services or works without written notification as referred to in tender condition 13.8 that they have been awarded the Contract and are required to start work.
- 13.9. Tenderers should also note that, should they be successful, the Council reserves the right to terminate the Contract, forthwith by notice under this tender condition 13.9, if at any time it is discovered that the Tenderer made any material misrepresentation and/or failed to notify the Council of any material changes in relation to the information provided in their Tender submission.

14. Whistleblowing Policy and Procedure

- 14.1. This policy describes the Council's commitment to supporting and protecting whistleblowers. It applies to contractors as well as Council employees.
- 14.2. For details of the policy:
<https://modern.gov.dorsetcouncil.gov.uk/ecCatDisplay.aspx?sch=doc&cat=13280>

Statutory Selection Stage Process – Open Procedure

1. Standard Selection Questionnaire (SQ)

- 1.1. Supplier selection is a key stage in public procurement, where contracting authorities must gather information on, and make assessments of, potential suppliers' technical and professional abilities, economic and financial standing and whether any of the exclusion grounds set out in the Regulations apply.
- 1.2. The standard selection questions ask Tenderer's to self-declare their status against the exclusion grounds and provide preliminary evidence of their suitability to pursue a professional activity, economic and financial standing, and technical and professional ability.
- 1.3. The standard selection questions are structured in 3 parts:
 - Part 1 – covers basic information about the Tenderer, such as the contact details, professional body memberships, details of parent companies, group bidding, and so on.
 - Part 2 – constitutes self-declarations of whether (or not) any of the exclusion grounds apply.
 - Part 3 – asks for evidence and self-declarations of economic and financial standing and self-declarations relating to technical and professional ability.
- 1.4. SQ Part 1 and SQ Part 2 self-declarations on exclusion grounds are built into the e-tender system by Proactis (the Council's e-tender system ProContract provider). This provides means for the SQ Part 1 and Part 2 to be portable across the e-tender system and the questions are mandatory to be applied by all contracting authorities.
- 1.5. SQ Part 3 is built into the e-tender system by the contracting authority as the set questions may be adopted or not by the contracting authority, depending on the procurement concerned.
- 1.6. Tenderers are required to complete all 3 parts of the SQ.

Evaluation and Award

1 Evaluation

- 1.1. Evaluations will be undertaken by officers of the Council who will follow a systematic and comprehensive process in accordance with the Council's procedures.
- 1.2. Tenders will be evaluated using the declared evaluation award criteria and weightings and/or pass/fail criteria to find the most suitable Tenderer who can meet the Specification and provide competitiveness of price.
- 1.3. Submitted Tender responses will be evaluated by officers of the Council using the published evaluation award criteria and weightings.

2 Evaluation Award Criteria and Weightings

- 2.1. The Tenderer's completion of contract specific on-line questions will give the evaluation criteria award score in terms of Quality/Social Value and if applicable any questions related to Price.
- 2.2. Such questions shall include, but are not limited to, questions in relation to accreditations and memberships relating to the quality of provision, and specific questions to technical abilities in terms of contract delivery / performance in relation to the goods, services and works being tendered.
- 2.3. The Tenderer's completion of the Price Schedule, and if applicable any questions related to Price, will give the evaluation award criteria score in terms of Price (refer to 6. Evaluation of Price).

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- 2.4 Refer to Appendix A - Tender Evaluation Model, for a copy of the on-line questions, and their weightings, that Tenderers are required to respond to.
- 2.5 The following Evaluation Award Criteria and Weightings shall be applied:

| EVALUATION AWARD CRITERIA & WEIGHTINGS | |
|--|-----|
| Price | 55% |
| Quality | 40% |
| Social Value | 5% |

3 Evaluation Award Criteria Scoring

- 3.1 The on-line questions within the e-tender system must be completed by Tenderers and where requested to do so, Tenderers must attach required documentation.
- 3.2 The Tenderer's response to each question shall be scored using the evaluation award criteria scoring matrix set out in the table below.

| SCORE | CLASSIFICATION | DEFINITION |
|-------|---|---|
| 0 | Unable to evaluate (complete non-compliance with the requirements) | No response at all or insufficient response that fails to evidence and demonstrate the Tenderer's understanding of the requirements or the Tenderer's ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause for concern. |
| 1 | Unsatisfactory response (potential for some compliance with requirements but major areas of weakness) | Unsatisfactory response that fails in several significant areas to address and meet the requirements. It includes unsatisfactory detail (and, where evidence is required or necessary, no evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and/or considerable reservations as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 2 | Basic response (one or more areas of weakness of compliance with the requirements) | Basic response which does not fully address and meet the requirements. It includes basic detail (and, where evidence is required or necessary, with insufficient evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and/or some reservations |

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| | | |
|---|---|--|
| | | and weakness as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 3 | Good response (substantial compliance with the requirements and no major concerns) | Good response which addresses and meets the requirements. It includes good detail (or, where evidence is required or necessary, with some relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements to be able to deliver the requirements and/or minimal reservations as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 4 | Very good response (fully compliant with the requirements, good level of confidence of delivery) | Very good response which addresses and meets the requirements. It includes very good detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements or will be able to deliver requirements and provides a good level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 5 | Excellent, outstanding response (fully compliant with the requirements, high level of confidence of delivery) | Excellent detailed response which fully addresses and meets the requirements. It includes excellent and extensive detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and will be able to deliver requirements and provides a high level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. Overall, an outstanding response. |

- 3.3 The Council reserves the right to supplement the above definitions, against individual questions to aid evaluation. Where definitions have been supplemented, this will be stated to tenderers against the questions concerned.
- 3.4 Appendix A – Tender Evaluation Model sets out the on-line evaluation specific to the requirements in terms of:
- questions and if applicable, sections/subsections that will be evaluated
 - evaluation award criteria scoring per question
 - weightings per question and if applicable, weighting per section/sub-section
 - pass/fail criteria, if applicable
- 3.5 All the individual questions are mandatory therefore Tenderers are required to submit a response. Failure to complete the on-line questions will result in a Fail as evaluators will not be able to fully evaluate the Tender submitted.
- 3.6 **Minimum Evaluation Score:** Where an evaluation question has a minimum score threshold for award, Tenderers must achieve the relevant minimum score threshold stated in respect of each and every one of the relevant questions. The Council will reject Tenders that do not meet one or more of the minimum score thresholds.

Example

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*Each of the questions below has a minimum **evaluation award criteria score** set of 2 – ‘Basic’. If Tenderer is scored 0 or 1 against any one of these questions, then the Council will reject their Tender as they have not met the minimum score threshold of 2 – ‘Basic’.*

| Question No | Question Weighting % | Minimum Score |
|-------------|----------------------|---------------|
| 1 | 25% | 2 - Basic |
| 2 | 25% | 2 - Basic |
| 3 | 25% | 2 - Basic |
| 4 | 25% | 2 - Basic |

4 Pass Fail Criteria

- 4.1 Where sections or questions have a criteria of Pass or Fail, it will be clearly stated as such. Such sections or questions evaluated as a Fail will result in the Tender being deemed non-compliant.

5 Moderation of Evaluation Award Criteria Scores

- 5.1 The evaluators will independently score tender submissions. In the event that evaluators have given different scores, a moderation exercise will be led by Commercial & Procurement, as the moderator, with the evaluators to agree a consensus score in accordance with the evaluation award criteria scoring matrix (refer to tender condition 3.2 above).

6 Evaluation of Price

- 6.1 The scoring is carried out outside of the e-tender system.
- 6.2 The equations used outside of the e-tender system to reach the score between 0-5 are as follows (for purpose of explanation, the outcome of each calculation is shown as Sum A, Sum B, etc).

Stage 1

All price bids are compared against lowest bid to reach percentage difference from lowest bid.

*Equation: $(price\ bid - lowest\ bid) / lowest\ bid * 100 = Sum\ A$*

Stage 2

Sum A is then shown as % different from 100

Equation: $100 - Sum\ A = Sum\ B$

Stage 3

Sum B is then divided by 100 to show it as a figure

Equation: $Sum\ B / 100 = Sum\ C$

Stage 4

Sum C is then multiplied by the maximum score of 5 to reach the final score (5 being the maximum score set within the e-tender system)

*Equation: $Sum\ C * 5$*

- 6.3 The final score (outcome of Stage 4) is then entered into the e-tender system (evaluation of Price) and will be within 2 x decimal places, e.g.3.50 and then the relevant weighting for the price evaluation is applied (refer to 7. Evaluation Weightings and Appendix A – Tender Evaluation Model). No minus scores are acceptable therefore any minus scores will be entered as 0.

7 Evaluation Weightings

- 7.1 Score cards are set in the e-tender system which may hold sections, subsections and questions that are weighted. Within a score card all weightings are allowed a maximum of 100 and based on percentages. This applies to a single weighting of score card, section, subsection or question.
- 7.2 For example:
- Score card with four sections
- Four sections @ 25% weighting each = 100% weighting for the whole evaluation
- Five questions in a section @ 20% weighting each = 100% weighting for the whole section
- An evaluation has a maximum score of 5 (as set in the e-tender system). If question has a weighting @ 20% and the evaluation attained a score of 5, then the result will be achieving the full 20% of the question's weighting.
- 7.3 Evaluation weightings are applied first to the questions, and then the results of those weightings are applied to sections/subsection.

8 Tie Break Criteria

Should the situation arise whereby two or more Tenderers have achieved the same total evaluation outcome the following Tie Break Criteria methodology will be applied. For avoidance of doubt, the Tie Break Criteria shall not be relevant where only one Tenderer has achieved the highest total evaluation outcome (higher than the other Tenderers).

Tie Break Criteria methodology

- Tie Break Criteria 1: The Tenderer with the highest price weighting score will be the successful Tenderer.

If the Tie Break Criteria 1 does not produce a result which differentiates the equal winning scores, then Tie Break Criteria 2 shall be applied.

- Tie Break Criteria 2: If the tied Tenderers' price weighting score (Tie Break Criteria 1) are the same then the Tenderer with the highest quality weighting score out of the tied Tenderers will be the successful Tenderer.

9 Financial Evaluation

- 9.1 The extent of the Financial Evaluation will depend on the value and strategic importance of the contract, whether a Public Contract or individual Call-Off Contracts from a Framework Agreement. The objectives of undertaking Tenderer's financial assessment as part of a procurement exercise are to:
- Assess the risk to public sector business and/or public money which would result if a Tenderer bidding for a contract were to go out of business, or have inadequate financial resources to perform the contract; and
 - When justified, eliminate from the procurement any Tenderer whose current financial capacity would pose an unacceptable risk to business and/or public money.
- 9.2 Financial evaluation will be a combination of both financial and non-financial factors and will consider:
- Applicant Acceptability - status of a Tenderer in relation to the requirements of Regulation 57 and 58 of the Public Contracts Regulations 2015.

Economic and Financial Standing

- 9.3 A Tender will be deemed to be a higher risk if the Tenderer appears to be an unrealistic candidate where the contract value represents a disproportionate volume of the Tenderer's business considering the nature, timescales, value and risk of the contract.
- 9.4 In performing the economic and financial standing assessment the Council will consider, but not be limited to considering, turnover, profitability, cash flow, solvency, strength of balance sheet and asset cover level. To support this assessment the Council may seek reference to other independent reports and information such as credit reference agency reports. The Council reserves the right to take up any references supplied.
- 9.5 Other publicly available information about the Tenderer, such as (but not limited to) information available from a credit checking site or agency, Companies House and/or media outlets, may also be used by the Council as part of its verification of bidders self-certified scores or alternative evidence.
- 9.6 The methods and criteria against which bidders will be assessed by the Council to determine whether they possess the necessary level of economic and financial standing to perform the contract are set out below.
- The following financial ratio analysis, assessing liquidity, debt and profitability will be conducted using the last 2 year's accounts where possible.
- Current Assets / Current Liabilities > 1
- Cash / Current Liabilities > 0.5
- Total Debt / Total Assets < 0.4
- Total Debt / Total Equity < 0.2
- Gross Profit / Sales > 0%
- Net Profit / Sales > 0%
- 9.7 Following completion of the above-mentioned financial ratio analysis if a Tenderer receives a:
- PASS on all ratios, the Tenderer will receive a PASS for the financial evaluation.
 - FAIL on one ratio, the Tenderer will receive a PASS for the financial evaluation.
 - FAIL on two or three ratios, then the Council will undertake a further economic and financial standing risk assessment, using an independent report from a credit reference agency (Creditsafe).
 - If the Risk Score for the Tenderers organisation from this report is 30 or more then the Tenderer will receive a PASS for the financial evaluation, however, the annual contract amount will be limited to the amount stated on this report.
 - If the Tenderer has a Risk Score of less than 30 then the Tenderer will FAIL the financial evaluation and be excluded from the procurement, unless the Tenderer provides a guarantor whose level of financial risk is acceptable.
 - FAIL on four or more ratios the Tenderer will FAIL, the financial evaluation and will be excluded from the procurement process unless the Tenderer can provide a guarantor whose level of financial risk is acceptable.
- 9.8 The above financial assessments will be repeated on any guarantor nominated under this financial evaluation. Therefore, the guarantor will only be acceptable if either it would have passed all the ratios itself or if it failed on two or three ratios only, would have passed the credit rating with a Risk Score of 30 or more, the annual contract amount will be limited to the amount stated on this report. A guarantor who fails on four or more ratios will not be an acceptable guarantor under the financial evaluation.
- 9.9 If the Tenderer cannot provide a guarantor whose level of financial risk is acceptable or cannot provide a guarantor where required to do so, the Tenderer will FAIL the financial evaluation and be excluded from

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the procurement process.

- 9.10 The Council reserves the right to take up any references supplied and to send post-tender clarification questions to the Tenderers in respect of any information provided by and/or publicly available information.
- 9.11 Failure by the Tenderers to provide information requested and/or respond to any clarification questions from the Council by the deadlines given may result in exclusion from this procurement.
- 9.12 Following any verifications and / or clarification responses, if the Council concludes that the Tenderer does not meet the necessary economic and financial standing to perform the contract, the Council reserves the right to award the contract to the next highest ranked compliant Tenderer who has passed the financial evaluation.
- 9.13 It is emphasised that financial standing is only a part of the overall selection criteria.

10 Procurement Timetable

- 10.1 The indicative timetable for this procurement is set out below. This is intended as a guide and, whilst the Council does not intend to depart from the timetable, it reserves the right to do so in its absolute discretion at any time.

Table: Procurement Timetable

| Date or Target Date | Activity |
|---------------------|-------------------------------|
| 21/06/24 | Tender Released |
| 17/07/24 @ midnight | Clarification period end date |
| 24/07/24 @14:00 | Tender return date |
| 09/08/24 | Tender Evaluations complete |
| 12/08/24 | Provisional contract award |
| 22/08/24 | 10 day standstill period ends |
| 23/08/24 | Contract Award |
| 01/09/24 | Contract Start date |

Documentation

Within this Tender process Tenderers have been provided with the following documentation. Where indicated by ✓ these are required to be completed and uploaded within the e-tender system.

| LOCATION OF DOCUMENT | DOCUMENT TITLE | COMPLETE AND UPLOAD |
|----------------------|---|---------------------|
| Advert / EOI | Procurement Document SPF 2024 Appendix A – Tender Evaluation Model | x |
| Advert / EOI | Schedule 1 – Specification | x |
| Advert / EOI | Schedule 2 – Price Schedule | ✓ |
| Advert / EOI | Contract Terms and Conditions | x |

Disclaimer

The information in this document does not purport to be comprehensive. It has not been independently verified. It is not intended to provide the basis of any investment decision and should not be considered as a recommendation by Dorset Council nor as an invitation to negotiate.

The Council does not accept any qualifications or additions to invitations to tender except those raised and responded to in the clarification stage or where a response to a question is requested. The Council will not accept any amendments or alterations to the terms and conditions raised before, during or after the tender submission.

Any errors in this procurement document shall not invalidate the Tender procedure nor release any Tenderer from any obligation under a Contract. Errors or omissions corrected by the Council that affect the Contract shall be made by agreement.

The Council reserves the right to change the Tender procedure without prior notice and to terminate discussions and the delivery of information at any time before the signing of any Contract.

Reference [DN728813]

Dorset Council
April 23

| | | | |
|---|---|---|--|
| | | | <ul style="list-style-type: none"> No evidence of previous successful service provision of business support services. No evidence of learning or adaptation of previous service provision |
| 1 | Unsatisfactory response (potential for some compliance with requirements but major areas of weakness) | Unsatisfactory response that fails in several significant areas to address and meet the requirements. It includes unsatisfactory detail (and, where evidence is required or necessary, no evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and/or considerable reservations as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. | <p>Specifically:</p> <ul style="list-style-type: none"> Limited evidence of understanding of communication methods likely to be effective with the target audience Limited evidence of understanding of communication methods likely to be effective with the organisations likely to have preexisting relationships with the target audience Limited evidence of previous successful service provision of business support services. Limited evidence of learning or adaptation of previous service provision |
| 2 | Basic response (one or more areas of weakness of compliance with the requirements) | Basic response which does not fully address and meet the requirements. It includes basic detail (and, where evidence is required or necessary, with insufficient evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and/or some reservations and weakness as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. | <p>Specifically:</p> <ul style="list-style-type: none"> A mix of examples from categories 1 and 3 |
| 3 | Good response (substantial compliance with the requirements and no major concerns) | Good response which addresses and meets the requirements. It includes good detail (or, where evidence is required or necessary, with some relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements to be able to deliver the requirements and/or minimal reservations as to | |

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| 4 | Very good response (fully compliant with the requirements, good level of confidence of delivery) | Very good response which addresses and meets the requirements. It includes very good detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements or will be able to deliver requirements and provides a good level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. | <p>Specifically:</p> <ul style="list-style-type: none"> • A mix of examples from categories 3 and 5 |
| 5 | Excellent, outstanding response (fully compliant with the requirements, high level of confidence of delivery) | Excellent detailed response which fully addresses and meets the requirements. It includes excellent and extensive detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and will be able to deliver requirements and provides a high level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. Overall, an outstanding response. | <p>Specifically:</p> <ul style="list-style-type: none"> • Significant evidence of understanding of communication methods likely to be effective with the target audience • Significant evidence of understanding of communication methods likely to be effective with the organisations likely to |

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| | | <p>have preexisting relationships with the target audience</p> <ul style="list-style-type: none"> • Evidence of previous successful service provision of business support services. • Clear evidence of learning or adaptation of previous service provision |
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EVALUATOR GUIDANCE

This is a Minimum Evaluation Score question. Tenderers must achieve the relevant minimum score threshold for this question, which for this question is a score of 2. **The Council shall reject Tenders that do not meet the minimum score threshold for this question.**

| SCORE | CLASSIFICATION | DEFINITION |
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| 0 | Unable to evaluate (complete non-compliance with the requirements) | <p>No response at all or insufficient response that fails to evidence and demonstrate the Tenderer’s understanding of the requirements or the Tenderer’s ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause of concern.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • No evidence of understanding of communication methods likely to be effective with the target audience • No evidence of understanding of communication methods likely to be effective with the organisations likely to have preexisting relationships with the target audience • No evidence of previous successful service provision of business support services. • No evidence of learning or adaptation of previous service provision |
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| | | | <p>the requirements and/or considerable reservations as to the Tenderer’s relevant ability, expertise, skills and/or resources to deliver the requirements.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • Limited evidence of understanding of communication methods likely to be effective with the target audience • Limited evidence of understanding of communication methods likely to be effective with the organisations likely to have preexisting relationships with the target audience • Limited evidence of previous successful service provision of business support services. • Limited evidence of learning or adaptation of previous service provision |
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| | 4 | Very good response (fully compliant with the requirements, good level of confidence of delivery) | <p>Very good response which addresses and meets the requirements. It includes very good detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements or will be able to deliver requirements and provides a good level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • A mix of examples from categories 3 and 5 |
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| No 2 | QUESTION TITLE | Weighting |
| | <p>SERVICE DELIVERY – Specification Stages 1, 2, 3 & 4 Provide details of how your organisation proposes to deliver stages 1,2,3 and 4 (diagnostics, information, guidance, and advice) of the specification.</p> | |
| | DESCRIPTION | |
| | <p>Your response could include, but is not limited to:</p> <ul style="list-style-type: none"> • providing evidence of successful service provision in relation to similar projects or services • what you have learned or changed as a result of such provision. • the standards you work to, • and the scale or capacity you have or propose to develop | 60% |
| | SUPPLIER HELP | |
| | <p>This is a Minimum Evaluation Score question. Tenderers must achieve the relevant minimum score threshold for this question, which for this question is a score of 2. The Council shall reject Tenders that do not meet the minimum score threshold for this question.</p> | |
| | SCORE | CLASSIFICATION |
| | 0 | <p>Unable to evaluate (complete non-compliance with the requirements)</p> |
| | | DEFINITION |
| | | <p>No response at all or insufficient response that fails to evidence and demonstrate the Tenderer’s understanding of the requirements or the Tenderer’s ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause of concern.</p> |

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| 1 | Unsatisfactory response (potential for some compliance with requirements but major areas of weakness) | <p>Unsatisfactory response that fails in several significant areas to address and meet the requirements. It includes unsatisfactory detail (and, where evidence is required or necessary, no evidence submitted) within the response to demonstrate the Tenderer’s understanding of the requirements and/or considerable reservations as to the Tenderer’s relevant ability, expertise, skills and/or resources to deliver the requirements.</p> <p>Specifically:</p> <ul style="list-style-type: none"> Limited evidence of understanding of diagnostics, information, guidance and advice likely to be effective with the target audience Limited evidence of previous successful service provision of business support services. Limited evidence of learning or adaptation of previous service provision | |
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| 5 | Excellent, outstanding response (fully compliant with the requirements, high level of confidence of delivery) | <p>Excellent detailed response which fully addresses and meets the requirements. It includes excellent and extensive detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer’s understanding of the requirements and will be able to deliver requirements and provides a high</p> | |

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| | | | <p>level of confidence as to the Tenderer’s relevant ability, expertise, skills and/or resources to deliver the requirements. Overall, an outstanding response.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • Significant evidence of understanding of diagnostics, information, guidance, and advice likely to be effective with the target audience • Evidence of previous successful service provision of business support services. • Clear evidence of learning or adaptation of previous service provision |
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EVALUATOR GUIDANCE

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| | | | <ul style="list-style-type: none"> • Clear evidence of learning or adaptation of previous service provision |
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| No | QUESTION TITLE | Weighting | | | | | | |
|---|--|--|-------|----------------|------------|---|--|--|
| 3 | <p>SERVICE DELIVERY – Specification Stage X Provide details of how your organisation proposes to deliver stage X (Grant application evaluation and technical support) of the specification.</p> <p style="text-align: center;">DESCRIPTION</p> <p>Your response could include, but is not limited to:</p> <ul style="list-style-type: none"> • providing evidence of successful service provision in relation to similar projects or services • what you have learned or changed as a result of such provision • the standards you work to, • and the scale or capacity you have or propose to develop | 25% | | | | | | |
| SUPPLIER HELP | | | | | | | | |
| <p>This is a Minimum Evaluation Score question. Tenderers must achieve the relevant minimum score threshold for this question, which for this question is a score of 2. The Council shall reject Tenders that do not meet the minimum score threshold for this question.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #92d050;"> <th style="text-align: center;">SCORE</th> <th style="text-align: center;">CLASSIFICATION</th> <th style="text-align: center;">DEFINITION</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">0</td> <td>Unable to evaluate (complete non-compliance with the requirements)</td> <td> <p>No response at all or insufficient response that fails to evidence and demonstrate the Tenderer’s understanding of the requirements or the Tenderer’s ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause of concern.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • No evidence of understanding likely guidance and technical assistance needed by potential SPF business grant applicants • No evidence of understanding the processes or resources needed to independently evaluate business grant applications and make recommendations to award </td> </tr> </tbody> </table> | | | SCORE | CLASSIFICATION | DEFINITION | 0 | Unable to evaluate (complete non-compliance with the requirements) | <p>No response at all or insufficient response that fails to evidence and demonstrate the Tenderer’s understanding of the requirements or the Tenderer’s ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause of concern.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • No evidence of understanding likely guidance and technical assistance needed by potential SPF business grant applicants • No evidence of understanding the processes or resources needed to independently evaluate business grant applications and make recommendations to award |
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| | | | <ul style="list-style-type: none"> • A mix of examples from categories 3 and 5 |
| 5 | Excellent, outstanding response (fully compliant with the requirements, high level of confidence of delivery) | <p>Excellent detailed response which fully addresses and meets the requirements. It includes excellent and extensive detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and will be able to deliver requirements and provides a high level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. Overall, an outstanding response.</p> <p>Specifically:</p> <ul style="list-style-type: none"> • Significant evidence of understanding likely guidance and technical assistance needed by potential SPF business grant applicants • Significant evidence of understanding the processes or resources needed to independently evaluate business grant applications and make recommendations to award • Significant evidence of previous successful service provision of business support services. • Clear evidence of learning or adaptation of previous service provision | |

Criteria: SOCIAL VALUE

Section: Section Weighting @ 5%

| No | QUESTION | Weighting | | | | | | | | | |
|----------------------|---|--|----------------|------------|---|--|--|---|--|---|--|
| 1 | <p>Local Employment</p> <p>Submit (upload) details on how your organisation proposes to support the Council in delivering the following “Local Employment” outcome(s) in respect of this contract/framework. Include, but not limited to, a detailed response in respect of the outputs listed.</p> <p>Outcomes: <i>Increased number of employment and training opportunities for local people of Dorset, improving the employment opportunities for local people through training, apprenticeships, T-Levels and offering employment to local workforce.</i></p> <p>Outputs:</p> <ul style="list-style-type: none"> - How many new jobs (full time equivalent) will your organisation create within Dorset? - How many apprenticeships and/or T-Levels will your organisation support within Dorset? - How many hours of voluntary work hours will your organisation provide to the community of Dorset? - How many people within Dorset will your organisation support back to work with Coaching, mentoring, CV writing, mock interviews, etc? - How many people within Dorset will your organisation support into employment who face challenges, e.g. ex-offenders, disabled, ex-armed forces etc? - What % of your organisation’s staff live within Dorset or within 10 miles of Dorset? - What % of your organisation’s staff live within 30 miles of where the services are being delivered? - Any other measure | 75% | | | | | | | | | |
| SUPPLIER HELP | | | | | | | | | | | |
| | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="background-color: #c6e0b4;">SCORE</th> <th style="background-color: #c6e0b4;">CLASSIFICATION</th> <th style="background-color: #c6e0b4;">DEFINITION</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">0</td> <td>Unable to evaluate (complete non-compliance with the requirements)</td> <td>No response at all or insufficient response that fails to evidence and demonstrate the Tenderer’s understanding of the requirements or the Tenderer’s ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause of concern.</td> </tr> <tr> <td style="text-align: center;">1</td> <td>Unsatisfactory response (potential for some)</td> <td>Unsatisfactory response that fails in several significant areas to address and meet the</td> </tr> </tbody> </table> | SCORE | CLASSIFICATION | DEFINITION | 0 | Unable to evaluate (complete non-compliance with the requirements) | No response at all or insufficient response that fails to evidence and demonstrate the Tenderer’s understanding of the requirements or the Tenderer’s ability, expertise, skills and/or resources to deliver the requirements, and/or elements of the response gives cause of concern. | 1 | Unsatisfactory response (potential for some) | Unsatisfactory response that fails in several significant areas to address and meet the | |
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| | compliance with requirements but major areas of weakness) | requirements. It includes unsatisfactory detail (and, where evidence is required or necessary, no evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and/or considerable reservations as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 2 | Basic response (one or more areas of weakness of compliance with the requirements) | Basic response which does not fully address and meet the requirements. It includes basic detail (and, where evidence is required or necessary, with insufficient evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and/or some reservations and weakness as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 3 | Good response (substantial compliance with the requirements and no major concerns) | Good response which addresses and meets the requirements. It includes good detail (or, where evidence is required or necessary, with some relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements to be able to deliver the requirements and/or minimal reservations as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 4 | Very good response (fully compliant with the requirements, good level of confidence of delivery) | Very good response which addresses and meets the requirements. It includes very good detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements or will be able to deliver requirements and provides a good level of confidence as to the Tenderer's relevant ability, expertise, skills and/or resources to deliver the requirements. |
| 5 | Excellent, outstanding response (fully compliant with the requirements, high level of confidence of delivery) | Excellent detailed response which fully addresses and meets the requirements. It includes excellent and extensive detail (and, where evidence is required or necessary, with full and relevant evidence submitted) within the response to demonstrate the Tenderer's understanding of the requirements and will be |

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EVALUATOR GUIDANCE

| SCORE | CLASSIFICATION | DEFINITION |
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| No | QUESTION | Weighting |
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| 2 | <p>Buy Local Submit (upload) details on how your organisation proposes to support the Council in delivering the following “Buy Local” outcome(s) in respect of this contract/framework. Include, but not limited to, a detailed response in respect of the outputs listed.</p> <p>Outcomes: <i>Support the local economy by choosing suppliers close to the point of service delivery where possible, building the local economy by supporting local businesses and building your organisation’s supply chain locally. In particular, by opening up procurement opportunities to the local market. The Council defines “Local” as the geographical local authority area of Dorset Council.</i></p> <p>Outputs:</p> | 25% |

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| <ul style="list-style-type: none"> - What % of your organisation's spend will be suppliers located in Dorset? - What % of your organisation's spend will be with SMEs (less than 205 employees) located in Dorset? - What % of your total spend will be with the 3rd sector (Social Enterprises, Charities, etc) located in Dorset? - Any other measure | |
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SUPPLIER HELP

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PRICING **Section Weighting @ 55%**

| Description | Weighting |
|---|------------------|
| Total package cost, to include all fees, associated costs and expenses. This excludes VAT | 100% |