

Procurement Document

(Open Tender Procedure)

Tender for Property Owner Finder Service (empty homes and housing enforcement)

Reference DN720019

03 June 2024

Tender Response Deadline	14:00 hours on 04 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: Property Owner Finder Service (empty homes and housing enforcement)

Project Scope:

The [Dorset Council Delivery Plan](#) states that the Council will bring “At least 10 long-term empty residential properties back into use for housing purposes, as part of a wider set of initiatives to reduce the number of potential homes remaining empty”

The Council’s Housing Standards Team is responsible for delivering this corporate objective.

There are currently 1300 homes which are long term empty (6 months or more) of which 335 have been empty for 2 years or more (Council Tax data; October 2023).

The Housing Standards Team currently has ongoing enforcement action relating to 93 long term empty properties, with four cases currently subject to compulsory purchase proceedings.

It is common for the owners of abandoned properties to be absent and their whereabouts unknown or difficult to trace.

Dorset Council is seeking a supplier to provide owner tracing services.

As part of their business offering, a number of Professional Probate Research companies (‘the service provider’) provide free absent owner tracing services to public authorities.

The service provider then offers a discretionary, chargeable service to identified owners or next of kin on a no obligation basis. This chargeable service normally involves resolving issues with the estate, helping with probate and other similar matters. This chargeable service is not part of the Council’s involvement, however as the Council is introducing the owner/next of kin to the service provider, as far as possible we have a duty of care that we are working with and introducing a reputable firm who operates in a professional and ethical way.

There is also the potential opportunity to undertake focussed investigations of certain empty property groups, including Class F exemption Council Tax cases – this is where the person liable for Council Tax has passed away and the property is exempt from Council Tax. Where the exemption has been in place for a prolonged period, this indicates that no person is dealing with the estate (referred to as applying for probate). This can provide good leads for resolving a certain type of long-term empty property, help to get the issue resolved and also boost council tax revenue for the Council.

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).

IR35 - Employment Status

When the Council engages a contractor to provide services, it must ascertain the contractor's employment status to meet the requirements of HMRC and IR35 legislation. Should the Council determine that the contractor is to be regarded as an employee, the Council is required to deduct income tax and national insurance contributions from payments to the contractor.

Accordingly, Tenderers are expected to fully co-operate with the Council to provide all necessary information to enable the Council to accurately determine employment status.

Data Protection Legislation

Where the services require the successful Tenderer to process or share personal data, the contract/framework 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/framework 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. **‘Contracting Bodies’** or **‘Contracting Body’** or **‘End User’** means any other contracting bodies described in the Find a Tender notice;
- 1.3. **‘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;
- 1.4. **‘Council’** means Dorset Council;
- 1.5. **‘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;
- 1.6. **“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>
- 1.7. **‘Invitation to Tender’** means the Tender process and all its components, inviting tenders for goods, services, or works for inclusion within a Contract;
- 1.8. **‘Offer’** means the offer made / tendered by the Tenderer in relation to the proposed Contract;
- 1.9. **‘Specification’** means the scope of the goods, services or works to be provided pursuant to the Contract;
- 1.10. **‘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. 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 system within 7 working days before the closing date of the Tender (**ending midnight 28th June 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 14:00pm on 4th July 2024.**
- 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 90 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;

- 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://moderngov.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).
- 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	40%
Quality	50%

Social Value	10%
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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 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

*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: $(\text{price bid} - \text{lowest bid}) / \text{lowest bid} * 100 = \text{Sum A}$*

Stage 2

Sum A is then shown as % different from 100

Equation: $100 - \text{Sum A} = \text{Sum B}$

Stage 3

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

Equation: $\text{Sum B} / 100 = \text{Sum C}$

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: $\text{Sum C} * 5$*

- 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 quality 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' quality weighting score (Tie Break Criteria 1) are the same then the Tenderer with the highest price 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 Contract or an individual Call-Off Contract from a Framework Agreement. The objectives of undertaking a 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.

9.3 Economic and Financial Standing

9.4 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 taking into account the nature, timescales, value and risk of the contract.

9.5 The review of the financial health of a Tenderer may include, but not be limited to, the following checks:

- General review of Financial Statements.
- Review of ratios as appropriate, such as in the areas of financial structure (such as liquidity and gearing), operating performance (such as efficiency, profitability, and working capital), and investment.
- A credit rating check.
- Review for unusual accounting policies
- Review for major business restructuring.
- Review of audit Opinion.

- 9.6 It is emphasised that financial standing is only a part of the overall selection criteria.
- 9.7 The financial evaluation is not subject to any evaluation scoring criteria or weighting unless it is specifically stated otherwise.

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
03/06/2024	Tender Release
28/06/2024 @ Midnight	Closing Date for clarifications
04/07/2024 @ 14:00pm	Tender Return Date
16/08/2024	Evaluation and Moderation concluded
09/09/2024	Provisional Award notification
19/09/2024	10-Day Standstill Period ends
20/09/2024	Formal Award
01/10/2024	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 – Property Owner Finder Service Appendix A – Tender Evaluation Model	x
Advert / EOI	Specification - Property Owner Finder Service	x
Advert / EOI	Pricing Schedule – Property Owner Finder Service	✓
Advert / EOI	Dorset Council's Standard 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.

APPENDIX A – TENDER EVALUATION MODEL

The following are evaluation award criteria questions in respect of this procurement exercise which have been built into the e-tender system for tenderers to submit their responses.

Eligibility Criteria (Declaration) – An Organisation must confirm these criteria to proceed further in their application.

Criteria: Declaration for Service – Free of charge

No 1	QUESTION TITLE
	Free Service to Dorset Council
	DESCRIPTION
	DECLARATION: I confirm my organisation will deliver the Property Owner Finder Service free of charge to Dorset Council
	SUPPLIER HELP
	This is a mandatory declaration that will need to be completed to enable the application to be submitted.

Criteria: QUALITY

Section: CONTRACT SPECIFIC QUESTIONS Section Weighting @ 50%

No	QUESTION TITLE	Weighting
1	Submit (upload) a sample referral report, and detail what prescribed information is typically supplied to the local authority following a successful search.	10%
	DESCRIPTION	
	Your response should include, but is not limited to; <ul style="list-style-type: none"> • the full name of the property owner, • nearest next of kin, • full address(s), • and other relevant information. 	

SUPPLIER HELP

Your response should include, but is not limited to;

- the full name of the property owner,
- nearest next of kin,
- full address(s),
- and other relevant information.

Text question with Mandatory Attachments comments

250-word count

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
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 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 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. <i>Clear, concise report process and form. All essential information is readily identifiable and superfluous information is minimised or contained in an appendix.</i>
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. <i>All of point 4 including reference to the source of the information and likely accuracy or confidence levels.</i>

No	QUESTION TITLE	Weighting									
2	Transfer of Information	10%									
DESCRIPTION											
Provide details of your organisation’s preferred process of how referral data is supplied by the local authority to the supplier and how search data is sent back to the local authority to maintain data security and comply with General Data Protection Regulations (GDPR).											
SUPPLIER HELP											
<p>Your response should include, but is not limited to;</p> <ul style="list-style-type: none"> • Details of how data is shared electronically • The specific electronic format used whether that is email, web portal or similar • A brief explanation of how it is used • How the sharing is considered secure <p>Text Question with no attachments</p> <p>500 word count</p> <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>											
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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

			<p>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><i>All of point 4 including a strong emphasis on corporate GDPR responsibilities and management and insight into how this influences day to day data processing. An excellent response may recognise that data breaches can occur and will detail how they are managed and reported.</i></p>
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No	QUESTION TITLE	Weighting
3	<p>Provide details of the internal systems that your organisation uses to ensure that following a search the information that your organisation supplies to a local authority is as accurate as possible.</p>	20%
DESCRIPTION		
<p>Your response should include, but is not limited to;</p> <ul style="list-style-type: none"> • Information about quality systems and how you use them to improve results • How competency and quality is maintained • Training • Speed of response and trace success rates • Details of how your organisation is normally able to articulate the likely accuracy/confidence of your search result to the local authority. 		
SUPPLIER HELP		
<p>Your response should include, but is not limited to;</p> <ul style="list-style-type: none"> • Information about quality systems and how you use them to improve results • How competency and quality is maintained • Training • Speed of response and trace success rates • Details of how your organisation is normally able to articulate the likely accuracy/confidence of your search result to the local authority. <p>Text Question with no optional attachments</p>		

500 word count

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.**

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		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)	<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><i>A very good response will outline how the accuracy of data is maintained, checked and cross referenced. At the same time, it will detail the speed of response and how speed and accuracy are balanced.</i></p>
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><i>An excellent response will also detail how quality systems feed into day to day working practices.</i></p>

No	QUESTION TITLE	Weighting						
4	<p>Project-based work</p> <hr/> <p style="text-align: center;">DESCRIPTION</p> <p>Provide an example of previous ‘task and finish’ project work such as a Review of Council Tax Class F exempt properties (premises left unoccupied following the death of the Council Tax Payer) that your organisation has carried out for other local housing authorities or other bodies.</p> <p>Your response should include, but is not limited to:</p> <ul style="list-style-type: none"> • How you initiate the project • How you manage the project • How you ensure maximum success of the project • Typical updates and outcomes to the commissioning organisation. 	30%						
SUPPLIER HELP								
<p>Your response should include, but is not limited to:</p> <ul style="list-style-type: none"> • How you initiate the project • How you manage the project • How you ensure maximum success of the project • Typical updates and outcomes to the commissioning organisation. <p>Text Question with no attachments</p> <p>750 word count</p> <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" data-bbox="310 1493 1312 1724" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #d4edda;"> <th data-bbox="310 1493 435 1556">SCORE</th> <th data-bbox="435 1493 745 1556">CLASSIFICATION</th> <th data-bbox="745 1493 1312 1556">DEFINITION</th> </tr> </thead> <tbody> <tr> <td data-bbox="310 1556 435 1724" style="text-align: center;">0</td> <td data-bbox="435 1556 745 1724">Unable to evaluate (complete non-compliance with the requirements)</td> <td data-bbox="745 1556 1312 1724">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</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
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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.
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			<i>A very good response will detail how a project is initiated, timescales, data required from the local authority, how success is achieved, and typical outputs.</i>
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><i>An excellent response may outline how challenges and difficulties are overcome to provide the desired outcomes.</i></p>

No	QUESTION TITLE	Weighting
5	Provide details of the process by which beneficiaries that you engage with are offered your services.	
	DESCRIPTION	
	<p>Your response should include, but is not limited to;</p> <ul style="list-style-type: none"> • how your organisation ensures that this process is fair and ethical and free from any form of 'pressure or hard selling' and act in the best interests of the beneficiary. • details of the availability and relationship with any legal services that you may signpost customers to and how you ensure your customers receive a 'fit for purpose' legal service at all times. 	30%

SUPPLIER HELP		
<p>Your response should include, but is not limited to;</p> <ul style="list-style-type: none"> • how your organisation ensures that this process is fair and ethical and free from any form of 'pressure or hard selling' and act in the best interests of the beneficiary. • details of the availability and relationship with any legal services that you may signpost customers to and how you ensure your customers receive a 'fit for purpose' legal service at all times. 		
<p>Text Question with no attachments</p>		
<p>500 word count</p>		
<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>		
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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 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. <i>The supplier recognises that an ethical approach to providing services is beneficial but lacks detail on how that is achieved, monitored and managed.</i>
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. <i>The supplier has a very strong ethical approach to the way in which they provide their services, which is fully demonstrated by their response</i>

Criteria: SOCIAL VALUE

Section: CONTRACT SPECIFIC QUESTIONS Section Weighting @ 10%

No	QUESTION	Weighting									
1	<p>Good Employer Provide details as to how your organisation proposes to support the Council in delivering the following “Good Employer” outcome(s) in respect of this contract. This may include but not limited to, a detailed response in respect of the outputs listed.</p> <p>Outputs: How your organisation will assist Dorset Council to meet its Public Sector Equality Duties. For further information see: Our equality duties under the Equality Act - Dorset Council</p>	100%									
SUPPLIER HELP											
<p>Outputs: How your organisation will assist Dorset Council to meet its Public Sector Equality Duties. For further information see: Our equality duties under the Equality Act - Dorset Council</p> <p>Text Question with optional attachments</p> <p>500/ word count</p> <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>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 compliance with</td> <td>Unsatisfactory response that fails in several significant areas to address and meet the requirements. It includes unsatisfactory detail (and, where evidence is required or</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 compliance with	Unsatisfactory response that fails in several significant areas to address and meet the requirements. It includes unsatisfactory detail (and, where evidence is required or
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	requirements but major areas of weakness)	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.
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5	Excellent, outstanding response (fully compliant with the	Excellent detailed response which fully addresses and meets the requirements. It includes excellent and extensive detail (and,

		requirements, high level of confidence of delivery)	<p>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>The supplier fully understands, implements and shares the Councils aims regarding equality and has systems and a culture to ensure ongoing maintenance and improvement of delivering services in this way.</p>
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Criteria: PRICE

Section: BEST VALUE

Section Weighting @ 40%

No	QUESTION TITLE	Weighting
1	Price Schedule Submission	
	DESCRIPTION	
	<p>This is for the purpose of collating completed Price Schedules. This will allow the evaluation of price bids which are carried outside of the e-tender system but the outcome will be scored against the evaluation outcomes below.</p> <p>In pricing their bids, tenderers should take into account and, if necessary, seek advice on the potential impact of the Council determining that the employment status of the contractor falls within the IR35 tax rules relating to the provision of services through an intermediary.</p> <p>Should the Council determine that the contractor is to be regarded as employed for tax purposes under the IR35 rules, the Council is required to deduct income tax and national insurance contributions from payments to the contractor.</p> <p>The price submitted cannot be changed after the tender closing date.</p> <p>The HMRC toolkit to check employment status is at: https://www.gov.uk/guidance/check-employment-status-for-tax</p>	100%

SUPPLIER HELP

GUIDANCE: Suppliers are required to attach here their complete Price Schedule(s). This document is attached to this process for Suppliers to download and complete.
SCORING: Failure by Suppliers to attach their completed Price Schedule(s) will result in a Fail as Evaluators will not be able to evaluate fully the submitted bid. **NOTE:** The collation of Price Schedule(s) will allow evaluation of price bids outside of the e-tender system