

Scoring Methodology

1. Overall approach

- 1.1. Bids will be assessed for price and quality with scores weighted in the ratio 40:60 respectively.
- 1.2. Tenderers with the three highest scores will be invited to deliver a presentation to representatives of the Trust.
- 1.3. The presentations of the shortlisted suppliers will be further scored, with those scores being added to the shortlisted companies' initial scores.
- 1.4. The overall winner will be the bidder with the highest combined score.

2. Price

- 2.1. The supplier with the lowest price per payslip (before any additional value-added services) will be awarded a score of 40.
- 2.2. Bids will be scored using the formula:

$$\frac{\text{Lowest bid} \times 40}{\text{Tender price}}$$

3. Quality

- 3.1. Bids will be assessed against the following criteria:

Criteria	Supplier to provide	Weighting
Suitability of company	An overview of your company and the services provided.	10
Ability to meet the requirements	Confirmation on Appendix 3 that all required services can be provided.	20
Robust implementation plan	A project plan detailing how the implementation would be managed.	15
Experience of delivering similar services	Two case studies demonstrating relevant experience.	15
Suitably qualified staff	Simple team organisation chart and professional qualifications of staff to be assigned.	15
Support growth of the Trust	Details of how additional schools joining the Trust would be onboarded and any consequential impact on price.	10
Robust business continuity plans in place	Business continuity plans, providing assurance of continuity of delivery of services in the event of: <ul style="list-style-type: none"> - natural disaster - loss of IT services - pandemics - adverse weather - industrial disputes or staff shortages - receivership - loss of premises - any other major event likely to jeopardise the delivery of services 	5
References	Two references from current or recent customers in the education sector, one of which should be an Academy Trust.	5
Added Value	Details of any other support or services you could provide to add value to the Trust.	5

3.2. Bids will be scored on a scale of 0 to 5 for each criteria and then weighted on the basis of the relative importance of the subject. Scores will be awarded on the following basis:

Assessment of response	Definition	Score
Unacceptable	Response fails to address the requirement.	0
Poor	Response is very limited, unclear and/or unsupported by documentation.	1
Fair	Response is limited, and/or supporting documentation is insufficient to give confidence.	2
Satisfactory	Response meets the minimum criteria but potentially with some shortcomings in supporting documentation.	3
Good	Full, clear response with limited supporting evidence.	4
Excellent	Excellent response providing clear, detailed and consistent evidence.	5

3.3. Overall weighted scores will then be calculated as follows:

$$\frac{\text{Score awarded (0-5)}}{\text{Maximum score (5)}} \times \text{criteria weighting (see 3.1)} \times 60\% \text{ (quality weighting)}$$

4. Presentations

4.1. Shortlisted suppliers will be invited to the Trust Central Team Office, at Green Lane, Bradford, BD8 8HT to deliver a 30-minute demonstration of their payroll platform and to answer questions from a panel of Trust representatives for a further 30 minutes.

4.2. Presentations will be scored as follows:

A: Suitability of the payroll platform

The score for the suitability of the payroll platform will be determined following consideration of the functionality, performance and ease of use of the system as demonstrated on the day:

Assessment of response	Definition	Score
Unacceptable	The platform doesn't appear to deliver the required services, and/or the platform is unacceptably slow, and/or the platform appears complicated and difficult to use.	0
Poor	There are doubts over whether the platform can deliver some key aspects of the services, and/or system performance is poor, and/or the platform appears complicated and difficult to use.	1
Fair	There may be some limitations to the platform's ability to deliver the required services, and/or system performance is a little slow, and/or the platform can be navigated with extensive training and support.	2
Satisfactory	The platform appears fit for purpose, and/or system performance is acceptable, and/or the platform can be navigated with extensive training.	3
Good	The platform appears fit for purpose, and/or performance is mostly good, and/or the platform is reasonably easy to use and navigate.	4
Excellent	The platform is clearly able to deliver the required services, performance is swift or immediate and the platform is instinctive to use and easy to navigate.	5

B: Responses to questions from the Trust panel

The score for the responses to questions will be determined according to the perceived suitability of the responses to the Trust's context and priorities:

Assessment of response	Definition	Score
Unacceptable	No answer was provided.	0
Poor	The answer failed to provide adequate assurance of suitability.	1
Fair	The answer provided limited assurance of suitability.	2
Satisfactory	The answer provided adequate assurance of suitability but without any relevant examples.	3
Good	The answer provided a good level of assurance with reasonable examples given.	4
Excellent	The answer provided excellent assurance of suitability, with relevant examples given, demonstrating a comprehensive grasp of the needs of the Trust.	5

4.3. Scores from both sections will be added together to provide a maximum additional score of 10.

5. The score from the presentations will be added to the scores from the earlier price and quality assessments to give an overall score, with the winner being the bidder with the highest score.