APPENDIX K TENDER SCORING METHODOLOGY

Assessment Process and Award Criteria Summary – further details are provided in the Invitation to Tender

The evaluation of Tenders will be carried out in three (3) stages to identify the Tenderer offering the Most Advantageous Tender (MAT) based on the following Quality, Social Value and Price award criteria.

Award Criteria	Total Weighting 100%	
	Stage 2 (total 80%)	
Method Statements Quality	**40%**	
	Service Delivery Approach	35%
	Product Development	35%
	Exit Management	15%
	Reporting & Analytics	15%
	Total Sub Criteria	100%
Method Statement Social Value	**10%**	
Price	**30%**	
	Stage 3 (total 20%)	
Demonstration Quality	**20%**	
	Core HR Functionality	35%
	Payroll & Pensions	35%
	Reporting & Analytics	10%
	Performance Management	10%
	Onboarding & Recruitment	5%
	Employee Engagement	5%
	Total Sub Criteria	100%

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Stage 1 – Procurement Specific Questionnaire (PSQ) Pass/Fail

The Procurement Specific Questionnaire (PSQ) will be reviewed against the pass/fail criteria in this document. If any mandatory requirement is not met, the Tender will not proceed further. Tenders that do not pass Stage 1 will not be assessed.

Stage 2 – Quality, Social Value and Price

Quality

Method Statements will be evaluated using the scoring methodology in this document. Clarifications may be requested in writing and scores may be adjusted.

Price

Prices that appear unrealistically high or low may be rejected following discussion with the Tenderer. The lowest sustainable whole life price (3 years) will receive 100% of the Price Score. Other prices will be scored proportionally.

Social Value

The Method Statement will be evaluated using the scoring methodology in this document.

Outcome of Stage 2

Quality, Social Value and Price scores are combined into a Total Score. Up to five (5) highest scoring Tenderers (or fewer in the event of ties) will be invited to Stage 3.

Stage 3 – Demonstrations

The assessment criteria are contained within this document. Failure to demonstrate will result in disqualification.

Outcome of Stage 3

The scores from Stage 2 and Stage 3 will be combined to create a Final Total Score.

Final Selection

Following a risk assessment, the Tenderer with the highest Final Total Score will be recommended for contract award.

Stage 1 – Procurement Specific Questionnaire (PSQ) Pass/Fail

Tenderers are required to answer and submit all questions in **Appendix A1: Stage 1 Procurement Specific Questionnaire Tender Response.** Failure to follow this instruction will result in disqualification from the tender process. Only Tenderers who pass all questions in Stage 1 will progress to Stage 2.

Question Section	Section Name	Marking Scheme	Score	Response Required
A	Preliminary Questions	For Information Only	Non	Yes
B	Part 1 Confirmation of core supplier information	Attach core supplier information and answer yes that information is shared – Pass.	Pass/Fail	Yes
C1	Part 2A associated persons	Answer yes and respond to QC2, QC3, QC4 & QC5 – Pass Answer No – Pass	Pass/Fail	Yes
C2	Part 2A associated persons	Provide requested information in an attachment – Pass. Question is not applicable - Pass	Pass/Fail	Yes
C3	Part 2A associated persons	Confirm Yes or No - Pass	Pass/Fail	Yes
C4	Part 2A associated persons	If yes to QC3 attach full details - Pass	Pass/Fail	Yes
C5	Part 2A associated persons	If no to QC3 confirm no attachment required – Pass	Pass/Fail	Yes
C6	Part 2B List of all intended sub-contractors	Required information provided – Pass. Statement confirming p intended sub-contractors - Pass	Pass/Fail	Yes

C7	Part 2B List of all intended sub-contractors	Answer Yes or No – Pass	Pass/Fail	Yes
C8	Part 2B List of all intended sub-contractors	If answer to QC7 was yes sub-contractor details provided – Pass. If answer to QC7 was no – Pass.	Pass/Fail	Yes
C9	Part 2B List of all intended sub-contractors	If answer to QC7 was no, confirm no attachment required – Pass.	Pass/Fail	Yes
D1	Part 3 Questions relating to conditions of participation financial capacity	Answer Yes or No – Pass	Pass/Fail	Yes
D2	Part 3 Questions relating to conditions of participation financial capacity	If answered yes to QD1 provide name and evidence of economic and financial standing – Pass. If answered no to QD1 – Pass.	Pass/Fail	Yes
D3	Part 3 Questions relating to conditions of participation financial capacity	If answered no to QD1 confirm no attachment required – Pass.	Pass/Fail	Yes
D4	Part 3 Questions relating to conditions of participation financial capacity	Commit to or commit to obtain insurance cover as indicated – Yes – Pass No - Fail	Pass/Fail	Yes
E1	Legal Capacity	Information Commissioners Office Registration Number provided that matches the Tenderers details – Pass. Incorrect Information Commissioners Office Registration Number provided or not registered – Fail.	Pass/Fail	Yes
E2-E24	Legal Capacity	Yes response – Pass. No response – Fail	Pass/Fail	Yes
F1-F21	Non Functional Solution Requirements	Yes response – Pass. No response – Fail	Pass/Fail	Yes
G1-G22	Functional Payroll Specific Requirements	Yes response – Pass. No response – Fail	Pass/Fail	Yes
H1-H19	Functional HR Specific Requirements	Yes response – Pass. No response – Fail	Pass/Fail	Yes
I1 – I27	Relevant experience and contract examples	All information provided– Pass. No information provided – Fail. Except for Tenderers who respond to QF29 - Pass	Pass/Fail	Yes
J28	Relevant experience and contract examples	Response provides a valid reason – Pass. N/A response (where three references provided) – Pass. Response is incomplete or reason is not valid – Fail.	Pass/Fail	Yes
J1	Modern Slavery	Yes response – Pass No response – Pass	Pass/Fail	Yes
J2	Modern Slavery	Yes response – Correct URL provided – Pass. No response N/A response provided - Pass	Pass/Fail	Yes
K1-K7	Declaration	Declaration complete and signed by Tenderer – Pass. Declaration not completed and/or not completed by tenderer – Fail.	Pass/Fail	Yes

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Stage 2 Method Statements Quality

All Method Statements Quality will be scored on a scale of 0 to 5, as set out below. Tenderers must meet each requirement in the scoring criteria to progress from zero to the maximum score of 5.

All Method Statement responses must be submitted using **Appendix A2 – Stage 2 Method Statements Tender Response Document**. Failure to use this document will result in disqualification.

Where permitted, Tenderers may include one (1) supporting attachment per question. There is no word limit for the attachment. Each attachment must be clearly identifiable and linked to the specific question it relates to. Cross-referencing to attachments for other questions is not permitted.

If (in the opinion of the Authority) the attachment contains extraneous information which has not been specifically requested (such as any sales literature and standard terms of trading) it will not be evaluated by the Authority.

Question	Scoring Mechanism	Scoring Criteria	Sub Criteria Weighting out of 100 %	Maximum Score Available	Maximum Word Count
1.Service Delivery Approach					
Please outline your approach to either: maintaining/developing the service (if you are the incumbent supplier) or transitioning into, maintaining, and developing the service (if you are not the incumbent supplier). One (1) attachment is allowed to accompany the question response – Appendix A2. Tenderers may refer to this attachment ONLY in their response. To achieve the	**0**	No response and/or non-compliant response	**35**	5	2500
	1	The response details the approach and proposed team structure, roles, responsibilities, and resource levels to support the Authority throughout the contract.			
	2	The response also details the ongoing training and support options for system administrators and super users, including User Acceptance Testing (UAT).			
	3	The response also details what is included in a standard support package (including but not limited to: fixes, upgrades, helpdesk, account management).			

maximum score of 5 the Tenderer must provide all the information as requested and provide the Authority with the confidence that the specification and service levels will be delivered.	**4**	The response is also accompanied by a detailed explanation of the Tenderer helpdesk model, service hours, and escalation process and how the Tenderer will manage the Authority relationship to ensure a positive experience for users throughout the duration of the contract?			
	5	The response also provides information about the Tenderers data centre and/or third party data centre provider including but not limited to: security standards that comply with a recognised standard such as CSA CCM and how the Tenderer/third party protects data at rest, including physical access control, and how the Tenderer will fully comply with a recognised standard such as CSA CCM v3.0 or equivalent?			
2.Product Development					
Please outline the key new features, enhancements, and modules planned for release over the next 24 months. How will your roadmap plans ensure long-term system sustainability for the Authority? One (1) attachment is allowed to accompany this question response Appendix A2. Tenderers may refer to this attachment ONLY in their response. To achieve the maximum score of 5 the Tenderer must provide all the information as requested and provide the Authority with the confidence that the specification and service levels will be delivered.	**0**	No response and/or non-compliant response	**35**	**5**	2500
	1	The response details major areas of the solution (HR, Payroll, Recruitment, Analytics, etc.) that will receive significant updates in the next 24 months and details what differences the updates will make to the Authority user experience.			
	2	The response also details how customer feedback/user community requests are collected and the decision-making process that decides what requests are included in the roadmap.			
	3	The response also details the new technologies (e.g., AI, automation, predictive analytics) the Tenderer plans to introduce within the next 24 months.			
	4	The response is accompanied by a detailed product development roadmap that details what planned updates/upgrades/new releases will be available and when they will be released over a defined 24-month period.			
	5	The also details if each update/upgrade/new release is included in the standard licence cost, or if it is charged for separately. If the cost is not already included in the pricing schedule the cost must be provided in the attachment.			
3.Exit Management					
	0	No response and/or non-compliant response			

			15	5	1000
Please describe your approach to managing contract exit. One (1) Attachment is allowed to accompany this question response - Appendix A2. Tenderers may refer to this attachment ONLY in their response. To achieve the maximum score of 5 the Tenderer must provide all the information as requested and provide the Authority with the confidence that the specification and service levels will be delivered.	**1**	The response details an end-to-end exit planning strategy tailored to the Authority.			
	2	The response also details the data to be migrated and the methodology (including the method of mapping, extraction, cleansing, validation etc).			
	5	The response also details which data formats will be used, how accuracy will be assured, how completeness will be guaranteed, and how integrity will be maintained when migrating data.			

4.Reporting & Analytics					
Please detail what audit trails, reporting and analytics the Tenderers solution can provide. One (1) Attachment is allowed to accompany this question response - Appendix A2. Tenderers may refer to this attachment ONLY in their response. To achieve the maximum score of 5 the Tenderer must provide all the information as requested and provide the Authority with the confidence that the specification and service levels will be delivered.	**0**	No response and/or non-compliant response.	**15**	**5**	1000
	1	The response details the reporting tools available including but not limited to standard reports, dashboards, custom reporting, and any real time capability.			
	2	The response also details what audit trails, reporting and analytics are included in the licence fee and what are provided at an extra charge. All charges not included in the pricing schedule must be provided in the attachment.			
	3	The response also details how Artificial Intelligence (AI) can provide benefits to the Authority in terms of time and cost savings.			
	4	The response is generic, not tailored to the Authority, not offering any tangible benefits to the Authority.			
	5	The response is tailored to the Authority and offers tangible benefits to the Authority.			

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Stage 2 Method Statement Social Value

The Social Value Method Statement will be scored on a scale of 0,1 and 5, as set out below. Tenderers will be assessed based on the scoring criteria below. The Method Statement response must be submitted using **Appendix A2 – Stage 2 Method Statements Tender Response Document**. Failure to use this document will result in disqualification.

Question	Scoring Mechanism	Scoring Criteria	Award Criteria Weighting 10%	Maximum Score Available	Maximum Word Count
5. Social Value					
In no more than 1000 words please set out, in a method statement, the specific, measurable and time bound commitment(s) your organisation will make to deliver the skills for growth: supporting growth sectors and addressing skills gaps and the following Award Criteria below. 2a. Learning and skills development opportunities relevant to the contract to address skills gaps.	0	No response and/or non-compliant response.	10	5	1000
	1	The response includes a generic (not specific) timed project plan setting out how the Tenderer will implement their commitment and by when, including: • Generic (not specific) timed action plan. • Generic (not specific) proposed metrics used to monitor the contract. • Generic (not specific) tools/processes used to gather and monitor performance. • Generic (not specific) governance, including nominated escalation points. • Generic (not specific) feedback and improvement procedures in place.			

Activities that demonstrate and describe the supplier's existing or planned: ● Activities to support relevant sector related skills growth and sustainability in the contract workforce. Illustrative examples: careers talks, curriculum support, literacy support, safety talks, and volunteering.					
● Delivery of apprenticeships, supported internships and T Level industry placement opportunities (Level 2, 3 and 4+) in relation to the contract. Response Guidance (not exhaustive) For example, the Tenderers response may include but is not limited to: 1) A range of quality opportunities for the Authority with routes of progression, e.g. apprenticeships, T Level industry placements, supported internships, students supported into higher level apprenticeships. 2) Upskilling - offering training/taster sessions for Authority students and or	5	The response includes specific to the contract and Authority timed project plan setting out how the Tenderer will implement their commitment and by when, including: • Specific to the contract and Authority timed action plan. • Specific to the contract and Authority proposed metrics used to monitor the contract. • Specific to the contract and Authority tools/processes used to gather and monitor performance. • Specific to the contract and Authority governance, including nominated escalation points. • Specific to the contract and Authority feedback and improvement procedures in place.			

Authority staff on digital skills or coding/software development. 3) Sustainable delivery e.g. remote training options for the Authority. Any social value commitments made by the successful supplier during the procurement process will be reflected in the contract either as contract terms, key performance indicators, or performance indicators.					

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Stage 3 Demonstration Quality

Tenderers demonstrations will be assessed as per the table below. Failure to demonstrate will result in disqualification.

Sub Criteria Number	Sub Criteria Weighting out of 100%	Sub Criteria	Demonstration Requirement	Maximum Score Available
1	35	Core HR Functionality	Demonstrate absence management, including long-term triggers and return-to-work workflows?	5
			What level of customisation is available for employee records, job roles, and contract templates?	5
			How is data visibility managed (e.g., grandfather rights, temporary manager reassignment)?	5
2	35	Payroll & Pensions	What payroll automation features exist (validation, audit trails, exception reporting)?	5
			Demonstrate pension reporting including MCR and iConnect	5
			Demonstrate payroll processing incl. ad hoc payments and automated calculations.	5
			Can the payroll be locked for changes for final processing?	5
			Demonstrate how leave (paid / unpaid) links into payroll calculations.	5
			Demonstrate how retroactive changes are processed (e.g. correction to previous month).	5
			Demonstrate RTI & Year-End (RTI submissions, P60s, download and application of HMRC notices from HMRC website)	5
			Demonstrate compliance alerts (e.g. NMW, duplicated records / bank details / NINO)	5
3	10	Reporting & Analytics	Demonstrate statutory report generation (e.g., FEW, SCR)?	5
			Demonstrate dashboards available for HR/Finance, and how they can be customised?	5
4	10	Performance Management	Demonstrate the performance review cycle, including goal setting, appraisals, and 360 feedback?	5

5	5	Onboarding & Recruitment	Demonstrate how onboarding is managed—from offer acceptance to induction—including e-signatures and document uploads?	5
			Demonstrate your applicant tracking system (ATS) and how it integrates with external job boards and/or the Authority website?	5
6	5	Employee Engagement	Demonstrate tools available for employee surveys, pulse checks, and/or feedback collection.	5
			Demonstrate any recognition or reward features within the solution.	5

Score	Description
0	No demonstration was provided and/or Tenderer failed to attend demonstration.
1	Demonstration lacked fundamental elements of the requirement.
2	Demonstration met most but not all elements of the requirement.
5	Demonstration fully met the requirement.