



Department
for Education


Guidance

Appendix F – framework evaluation standard

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The following standards apply to DfE funded schemes and school schemes. Framework users procuring non-school schemes shall apply the principles of these standards in their procurement activity under the construction framework and shall comply at all times with the regulations.

Overall responsibility

Department for Education (DfE) project directors are ultimately responsible for ensuring that tender evaluations are conducted fairly, transparently and in accordance with the DfE construction framework rules.

Forming the evaluation team

You must select suitably skilled evaluators to make up the evaluation team before the start of the procurement.

If you need to make changes to the evaluation team after issuing the PITT or ITT, please ensure that you keep a record of the changes and why you have made them.

A minimum of 2 evaluators must be assigned to each question, unless:

- the question is the low or medium value band price methodology question, which may be evaluated by a single technical assistant or quantity surveyor providing a detailed rationale
- the question is scored by a mathematical formula, in which case the score must be calculated and then checked by at least one other person working independently, one of whom must be DfE staff

Each evaluator must have the appropriate skills, knowledge and experience to evaluate the question responses in their entirety, and not be aware of any potential conflict of interest.

Evaluators of high value band design proposals at ITT must have attended the relevant CEMs.

Each evaluator must evaluate every bid response received for their question.

An evaluator may be assigned to more than one question.

Specialist advisers may be assigned to provide advice to evaluators on specific aspects of the bid responses. For example, ICT advisers may provide advice to evaluators on the ICT elements of an overall construction programme. Evaluators may take account of the advice offered to the extent relevant to the criteria, but not further.

A moderator, who is not one of the evaluators, must be assigned to oversee the moderation. The moderator must be familiar with the framework evaluation process.

A compliance checker must be assigned.

Preparing for the evaluation

Evaluators should discuss the question, scoring criteria and how they will apply to the scheme in advance of receiving bid responses.

Compliance check

Once the bid deadline has passed, the compliance checker must check that each bid response contains the necessary documentation and that question responses comply with the word limits (unless otherwise stated, word limits include words contained within tables, graphics, and images). Any links to supplementary documents will not be evaluated.

At the discretion of the project team, and for school schemes also with frameworks manager approval, the bidding panel members may be given the opportunity to correct genuine errors (examples could include, but not be limited to, formulaic errors or attachments not included) after they have submitted their bid. In correcting any genuine errors, a strict time limit will be applied within which to respond.

Bid responses must be sent to evaluators mentioning the word limit used and informing them of any question response that exceeds the word limit.

Pricing proposals must conform to the pricing rules as reflected in the pricing guidance, and prices submitted by the bidding Panel Member shall not exceed the relevant prices in the bidding panel member's framework pricing schedule save to the extent necessary to reflect any scheme specific requirements identified by the framework user in the ITT.

Evaluation

The evaluation team will disregard any statements that exceed the word limit. Unless otherwise stated, word limits include words contained within tables, photo captions, graphics, infographics, images etc.

Any attempt to adjust or 'normalise' price responses is not permitted. If it appears that a bidding Panel Member has not priced to deliver the full scope or has excluded an essential pre-construction or construction item a clarification must be issued to that party.

Each evaluator must produce scores and comments independently and submit to the moderator.

Clarification

In order to evaluate a panel member's response, evaluators may ask for clarification questions to be sent to bidding panel members. Clarifications should be limited to genuine ambiguity and / or uncertainty, and to essential matters that a Panel Member can answer in one or two sentences; they should not be permitted to amend their price consequent to a response to a clarification in respect of a quality question.

The clarification process must be concluded, to the DfE scheme team's satisfaction, prior to moderation.

Moderation

A moderation meeting (chaired by the moderator) must be held to agree final scores and comments.

In situations where 2 contractors are in design competition on the high value band, a DfE framework manager must be invited to the moderation meeting via DfEConstructionFramework.2021@education.gov.uk.

If present, the DfE framework manager will observe the moderation and provide clarification on rules for evaluation as required.

Evaluators must discuss their scores by consensus until they reach agreement on the final score and reasons / comments. They must not use average scores or majority voting to determine final scores.

The moderator must ensure that all question responses are scored in accordance with the scoring criteria published in the PITT / ITT issued to the framework members.

Informing framework members

Framework members must be informed of the outcome using the framework letter template.

Project directors must provide detailed feedback using the table within the framework letter template.

Telephone or face-to-face feedback meetings are encouraged but not mandated.

Framework reporting

Once completed and approved, project directors must send the evaluation/tender report to the framework team for information to DfEConstructionFramework.2021@education.gov.uk.

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