

## Invitation to Tender for the Provision of ICT Services for Diocese of Norwich Education and Academies Trust

### Scoring Methodology

Qualification Stage Questions - Standard Selection Questionnaire			
Question Number	Question Type	Scoring Information	Scoring Basis / Weighting
1.1	Organisation Details	This section is for information purposes only and will not be scored	Not Applicable
1.2	Bidding Model	This section is for information purposes only and will not be scored	Not Applicable
1.3	Contact Details	This section is for information purposes only and will not be scored	Not Applicable
2.1 - 2.3b	Grounds for Mandatory Exclusion	This section is scored on a Pass/Fail basis	Pass/Fail
3.1 - 3.2	Grounds for Discretionary Exclusion Part 1	This section will be evaluated on a pass/fail basis however organisations who self-certify that they meet the requirements will be required to provide evidence of this if they are successful at contract award stage	Pass/Fail
4.1-4.2	Economic & Financial Standing	This section is scored on a Pass/Fail basis. The minimum level of economic and financial standing is a turnover of twice the contract value as indicated in the Invitation to Tender document and the Standard Selection Questionnaire	Pass/Fail
5 - 5.3	Wider Economic Group	This section is for information purposes only and will not be scored	Not Applicable
6.1-6.3	Technical & Professional Ability	This section is scored on a Pass/Fail basis	Pass/Fail
7.1-7.2	Modern Slavery Act 2015	This section is for information purposes only and will not be scored	Not Applicable
8.1	Insurance	This section will be evaluated on a pass/fail basis however organisations who self-certify that they meet the requirements will be required to provide evidence of this if they are successful at contract award stage	Pass/Fail
8.2	Skills and Apprentices	This section is for information purposes only and will not be scored	Not Applicable

Evaluation Criteria - Technical Ability - Overall Quality Weighting 80%				
Question Number	Question Name	Question	Scoring Methodology	Weighting
1	Management of Legacy Assets	Tenderers are requested to describe their approach to the management of legacy assets for use within delivery of a managed service via the Framework, including the support of assets that are out of warranty or those that fall below a minimum requirement. Describe how you assess legacy assets and provide an indicative example of your minimum requirement for support of a Windows laptop within the agreed SLA. Using a Windows laptop as the example, where this asset falls below the minimum requirements, describe your approach to supporting this asset.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Approach reflects capability to assess and support legacy equipment of ranging quality and age.</li> <li>• Minimum requirements reflect a reasonable approach to the equipment use by schools.</li> <li>• Support of asset that falls below minimum requirements reflects reasonable and appropriate effort and response.</li> </ul>	8%
2	Service Desk	Tenderers are required to outline their methodology for delivering the Service Desk requirements as detailed within the specification. Describe who can access the Service Desk and how. Describe how you ensure the quality of the Trust and Recipient user experience of the Service Desk.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Description of service desk staffing – number and type of staff, whether they are dedicated to DNEAT, location UK or outside of UK</li> <li>• Approach ensures service desk staff have appropriate knowledge and skills to support the systems/requirements of each Recipient <ul style="list-style-type: none"> <li>• Demonstrates how the design of the service desk system best meets requirements</li> </ul> </li> <li>• All methods provided for fault logging during and outside core hours are described i.e. phone, email, portal <ul style="list-style-type: none"> <li>• Range of user types can access the Service Desk to appropriate levels</li> </ul> </li> <li>• Demonstrates ease of access to high quality of information via the system by the Trust and Recipient staff to track fault progress.</li> <li>• Approach maximises the use of information gathered via the service desk to identify risks and opportunities for Recipients and the wider Trust.</li> <li>• Approach ensures ease of access and use of all service desk functions, including description of the information required to log a fault <ul style="list-style-type: none"> <li>• The service desk follows best practice for service management – e.g. BSI service management standard</li> </ul> </li> </ul>	10%
3	Service Requests	The Tenderer is required to outline their approach for delivering the Service Requests; as detailed within the specification.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• The approach includes how the Tenderer would; identify what change is required; agree what the change will be; agree the timelines including any potential impacts; implement the change; and provide feedback.</li> <li>• Approach to change management ensures a system is in place to request, specify, agree and track acceptance of SR1 – SR4 changes.</li> <li>• Approach includes an annual programme of works which is inclusive of all SR3 changes. The programme of works is designed to cause minimal disruption.</li> <li>• Approach demonstrates that any change identified that will impact on business as usual, budget, programme or quality of service, is clearly outlined and reviewed, mitigated against, and agreed with the Customer as part of the service request process.</li> </ul>	6%
4	Project Management	The Tenderer is required to outline their methodology for delivering Project Management Requirements; as detailed within the specification.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Tenderer's description demonstrates capability to manage SR4 changes as a project within a managed service.</li> <li>• Tenderer's description demonstrates capability to manage projects for Recipients that have not taken up a managed service but wish to use the Framework for the design, supply, configuration and installation of new systems.</li> <li>• Tenderer describes how delivery of projects are managed to pose no disruption to business as usual services.</li> <li>• Tenderer's description of the delivery of ICT project management services demonstrates compliance with an industry standard practices, refined as needed to fit the size of the project.</li> <li>• Tenderer establishes how project-specific KPI's will be set with examples of project KPI's provided e.g. relating to budget, programme or agreed quality indicators.</li> </ul>	5%
5	Cost Sustainability	The Tenderer is requested to give the Trust its top 5 recommendations for supporting its Academies in maintaining ICT solutions under increasing budgetary constraints.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Recommendations reflect an understanding of the challenges the Trust and its Academies face with realistic, valuable opportunities to save costs or improve quality.</li> </ul>	7%

6	Managed Service Governance	The Tenderer is required to outline their methodology for delivering Managed Service Governance as required for this agreement. The Tenderer is requested to outline how the Service Management function can be used to continually improve the service and customer satisfaction. Provide a sample service report for a single Recipient. Provide a sample Trust managed service report assuming a minimum of 2 active managed service Recipients in place.	<ul style="list-style-type: none"> <li>• Tenderer identifies the Service Manager who will be appointed; their means/methods and frequency of communication with Trust and Recipient stakeholders</li> <li>• Tenderer outlines the approach to reporting and demonstrates how the monthly reporting can be used to improve the service</li> <li>• Tenderer provides an outline of how quarterly service management meetings can be used to continually improve the service and customer satisfaction; also includes an outline of agenda items that would be covered in the service meetings <ul style="list-style-type: none"> <li>• The sample service reports provide clarity and include relevant depth of detail to inform decision-making, as appropriate at Recipient and Trust level.</li> </ul> </li> </ul>	4%
7	Contract Governance Across the Trust	The Tenderer is required to describe how they intend to govern and manage the contract across the Trust. This includes managed service Recipients as well as Academies calling off other services via this contract. Include a description of the process for escalating issues and resolving disputes.	<p style="text-align: center;">Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Approach to ongoing contract governance enables effective communication with relevant decision-makers at appropriate opportunities, with sufficient regularity</li> <li>• Structure of the contract management function clearly supports the needs across the Trust <ul style="list-style-type: none"> <li>• Approach identifies risks/mitigations, opportunities/advantageous actions. <ul style="list-style-type: none"> <li>• Tenderer identifies the Contract Manager who will lead this function</li> </ul> </li> <li>• Effective process is described for escalating issues and resolving disputes.</li> </ul> </li> </ul>	4%
8	Contract Growth	The Tenderer is requested to provide specific examples of the activities it would undertake to grow the account and to describe how these activities would benefit of the Trust and the Academies.	<p style="text-align: center;">Methodology</p> <ul style="list-style-type: none"> <li>• Approach outlines opportunities to engage with Academies outside of the Initial Recipient group and details the planned activities/communications that will encourage schools to consider making use of the service. <ul style="list-style-type: none"> <li>• Examples of activities are valuable to existing and/or potential Recipients.</li> </ul> </li> <li>• An Account Management function exists to develop opportunities across the Trust.</li> </ul>	6%
9	Contract Exit Management	The Tenderer is requested to outline their methodology for delivering the Contract Exit Management requirements; as detailed within the specification.	<p style="text-align: center;">Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Tenderer agrees to work with replacement supplier(s) at the end of the contract <ul style="list-style-type: none"> <li>• Tender provides an outline of their exit management procedure</li> </ul> </li> <li>• Tenderer describes how their exit management procedure ensures a smooth transition of services. <ul style="list-style-type: none"> <li>• Tenderer describes the contents of the exit document pack</li> </ul> </li> </ul>	3%
10	Supply Chain Management	The Tenderer is requested to outline their methodology for identifying new providers, and vetting their supply chain for delivery of Procurement Services.	<p style="text-align: center;">Scoring Methodology</p> <ul style="list-style-type: none"> <li>• Tenderer outlines the process they have in place for identifying new providers, and for how they select suppliers to be part of their supply chain</li> <li>• Tenderer outlines the process they have in place for vetting suppliers in their supply chain</li> <li>• Tenderer outlines in brief how they manage issues in their supply chain and how they mitigate any risks with supply issues</li> </ul>	3%

11	Service Transfer Requirements	The Tenderer is required to outline their methodology for delivering the Service Transfer Requirements, using Bishops Academy for context; as detailed within the specification. Provide a project plan and the top 5 risks for service transfer at Bishops.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• A clear methodology is provided describing how the tenderers team will engage with the Trust, including methods of communication, frequency of meetings, achieving sign off, addressing issues and snags</li> <li>• A clear description of the methodology for documenting and handing over from the service transfer project team to the service delivery team</li> <li>• Description of how they will apply their project management methodology to the Service Transfer project.</li> <li>• Provision of detailed project plan for service transfer for Bishops Academy, including schedule of progress and planning meetings. Include the optional provision of infrastructure and server platform as part of the overall project plan. Assume a Go Live deadline of 5th January, 2018. (Not within word limit)</li> <li>• Description of approach to ensure minimum disruption to staff, students, and business processes during the Service Transfer.</li> <li>• Description of approach to ensure no loss of data occurs during the Service Transfer</li> <li>• Description of Test and Acceptance Strategy including sample test scripts.</li> <li>• Description of approach to training Recipient staff on new products or processes implemented to deliver the service (e.g. use of new Service Desk)</li> <li>• A clear explanation of how the new service will be provided to agreed timescales.</li> <li>• Outline the top 5 risks and proposed mitigations to service transfer at Bishops.</li> </ul>	10%
12a	Service Levels and Customer Satisfaction	Assuming a Recipient has taken up a full managed service and that an agreed Customer Satisfaction Survey has been undertaken, the Tenderer is required to describe the actions they would take to mitigate a dip in customer satisfaction. C12	<p>Scoring Methodology:</p> <ul style="list-style-type: none"> <li>• Actions described to mitigate a dip in customer satisfaction demonstrate the capability to identify and address the type of actions that best impact on customer satisfaction improvements.</li> </ul>	5%
12b	Service Levels and Customer Satisfaction – Temporary Suspension of Service Levels	The Tenderer is required to outline their method for implementing a mechanism that will enable the Temporary Suspension of Service Levels (The Pause Button); as detailed within the specification.	<p>Scoring Methodology:</p> <ul style="list-style-type: none"> <li>• Description clearly describes how this mechanism will be triggered and monitored.</li> </ul>	4%
13a	Team Structure - Organogram	Tenderers are requested to provide an organogram illustrating the overall structure of the service with named roles, responsibilities and escalation paths. Illustrate how the structure interfaces with the DNEAT structure.	<p>Scoring Methodology</p> <ul style="list-style-type: none"> <li>• The 1-page maximum organogram clearly shows the structure of the service, with no unnecessary roles included</li> <li>• A clear escalation route outlined</li> <li>• Clear indication of each role and their responsibilities</li> <li>• Named staff in each role (other than where TUPE applies)</li> <li>• The structure indicates relevant interfaces with the DNEAT structure – at Recipient and Trust level.</li> <li>• Structure clearly demonstrates capability and capacity to deliver the service through all phases, including service transfer, handover to on-going delivery and contract management.</li> </ul>	5%
13b	Team Structure - CVs	Tenderers are requested to provide the CVs for the Service Manager and the Service Transfer Project Manager.	<p>Scoring Methodology:</p> <ul style="list-style-type: none"> <li>• The two CVs indicated are included (these can be anonymised if required, hyperlinks to LinkedIn profiles are not acceptable)</li> <li>• The Service Manager CV must demonstrate suitable qualifications and a minimum of 5 years' experience managing ICT managed services in organisations of similar size and complexity. The CV must reference a minimum of 2 named clients that fit this description.</li> <li>• The Service Transfer Project Manager CV must demonstrate suitable qualifications (e.g. PRINCE 2 or equivalent) and a minimum of 5 years' experience delivering projects of this scope and complexity. The CV must reference a minimum of 2 named clients that fit this description.</li> </ul>	5%

14	Presentation	Tenderers are required to deliver a 20 minute presentation as part of the evaluation process.	A full outline of what is required to be delivered in the presentation can be found in the document entitled "ICT Services Presentation Overview"	6%
15	References	Tenderers are required to provide details of 3 referees that are relevant to this Tender and are of a similar nature / size of agreement. Please ensure you seek approval from the referee prior to completing and submitting this section. Referee details should be provided on the Standard Selection Questionnaire that is part of this tender document set.  A short questionnaire will be issued to each of the referees listed, with each of the questions on the questionnaire having a maximum of 5 marks available, the marks attained for each question will be combined to give a total reference score.	See below	n/a
15a	Reference 1	See above	Scoring Methodology Questionnaire response achieves 50 marks overall = 5 Marks Questionnaire response achieves between 49-44 marks overall = 4 Marks Questionnaire response achieves between 43-38 marks overall = 3 Marks Questionnaire response achieves between 37-32 marks overall = 2 Marks Questionnaire response achieves between 31-26 marks overall - 1 Mark Questionnaire response achieves 25 marks or below overall = 0 Marks	3%
15b	Reference 2	See above	Scoring Methodology Questionnaire response achieves 50 marks overall = 5 Marks Questionnaire response achieves between 49-44 marks overall = 4 Marks Questionnaire response achieves between 43-38 marks overall = 3 Marks Questionnaire response achieves between 37-32 marks overall = 2 Marks Questionnaire response achieves between 31-26 marks overall - 1 Mark Questionnaire response achieves 25 marks or below overall = 0 Marks	3%
15c	Reference 3	See above	Scoring Methodology Questionnaire response achieves 50 marks overall = 5 Marks Questionnaire response achieves between 49-44 marks overall = 4 Marks Questionnaire response achieves between 43-38 marks overall = 3 Marks Questionnaire response achieves between 37-32 marks overall = 2 Marks Questionnaire response achieves between 31-26 marks overall - 1 Mark Questionnaire response achieves 25 marks or below overall = 0 Marks	3%
16	Cost Model	Tenderers are requested to provide supporting commentary to provide further clarity to their approach to costing. Further commentary as required to provide absolute clarity on the costs – both for the planned service and how costs might be derived for any additional services.	Not Scored - For Information Purposes only	0%
<b>Total</b>				<b>100%</b>