

**Annex 1 - Key characteristics of the final tenders and results of the evaluation – Document 5(a)**

**1A. Key technical features of tenders (based on submitted method statements)**

	<b>Tender 1</b>	<b>Tender 2</b>	<b>Tender 3</b>	<b>Tender 4</b>
<b>Programme of lessons &amp; activities (10 marks)</b>	<p>Team includes an eco flag assessor and offer teacher training on attaining Eco schools accreditation.</p> <p>Activities include waste audits and post audit action planning including adults and children in the school.</p> <p>Activities have clear linkage to the National Curriculum.</p> <p>A wide offering of "off the shelf" assemblies lessons, but with the opportunity to tailor. All activities have a take home message/worksheet.</p> <p>Would work with CAGs on community events - at least 16 events per yr.</p> <p><b>8 marks</b></p>	<p>Structured approach to lessons and activities. Take home messages for Key Stage 1 &amp; 2. Propose assemblies, workshops and support tools, but fewer tangible examples provided. All lessons and activities are to be developed with the support of named subcontractors.</p> <p><b>7 marks</b></p>	<p>Propose a multi-agency project board to steer the project.</p> <p>Delivery levels based on schools stage of development. Propose cluster of 20 hub schools (which become examples to wider community). Outreach programme offers a lighter touch (1 day) intervention at a greater number of schools.</p> <p>Annual green schools conference with awards sponsored by corporate partners will be developed. Corporate volunteers encouraged to visit schools and trainee teachers will also be encouraged to volunteer.</p> <p>A good range of lessons and activities set out, which are being delivered in other areas.</p> <p><b>7 marks</b></p>	<p>Will target lower performing areas (identified in partnership with the councils).</p> <p>Will offer "taster" one day visits or engagement visits, which involves 3 visits to the school. An Action plan will be developed with schools and the final visit will feature an award/celebration.</p> <p>All lessons are National Curriculum linked and differentiated according to ability. All staff are qualified eco-school assessors. Wide package of "off the shelf" lessons available.</p> <p><b>8 marks</b></p>

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<p><b>No. of anticipated visits (8 marks)</b></p>	<p>280 schools per year (waste &amp; energy combined). Propose at least 25% will be first visits to school. Propose a minimum of 30 schools per district per year.</p> <p><b>4 marks</b></p>	<p>300 schools per year, plus 12 community events.</p> <p><b>6 marks</b></p>	<p>Recruit 20 hub schools per year, plus 300 outreach visits.</p> <p><b>8 marks</b></p>	<p>150 schools per yr (more than if services are separate). *390 school visits per year (as schools visited up to 3 times). 20 community events per yr.</p> <p><b>2 marks</b></p>
<p><b>Booking system (4 marks)</b></p>	<p>Online calendar showing availability. Schools can book online then contacted for further information (context of visit, to select content etc). Teacher emailed two weeks before the date with lesson plans.</p> <p><b>3.5 marks</b></p>	<p>Online calendar showing availability. Schools book on line or by phone. Project staff follow up for further info.</p> <p><b>3 marks</b></p>	<p>Online calendar showing availability. Schools book on line. Project staff follow up for further info.</p> <p><b>3 marks</b></p>	<p>Web, phone and paper booking offered.</p> <p><b>2.5 marks</b></p>
<p><b>Recruitment and retention of staff (4 marks)</b></p>	<p>A senior officer will be involved in the early stages of contract. Have previous TUPE experience in this work area. Will conduct a redundancy in line with policy, as reducing staff numbers. A recruitment and induction will also be undertaken. Induction will be school based wherever possible. 3 month probation applies for new staff.</p> <p>Staff will be home based with office/admin space provided in Oxford. Will encourage CAGs to volunteer.</p> <p>No mention of bus usage training.</p> <p><b>3 marks</b></p>	<p>Outline role descriptions provided for whole team. Recruitment policy in place and acknowledgement of the TUPE process.</p> <p>Proposed training areas cover main contract requirements including bus usage. Training on programme delivery will be sub-contracted to named organisations.</p> <p><b>3 marks</b></p>	<p>A senior officer will be involved in early part of the contract. Sets out a structured approach to recruitment and redundancy. Redeployment options also offered. Will keep all TUPE'd staff on until December before undertaking a recruitment and redundancy process. Volunteer teacher training placements operate (where trainee teachers volunteer in the Programme). Also have corporate volunteers who visit schools.</p> <p>Plan to up-skill staff and offer higher base salary in order to retain and reward.</p> <p>Investors In People (IIP) accredited approach to</p>	<p>IIP held. Low turn-over of staff. Propose three project delivery staff, each will have a project element to lead.</p> <p>Not a great deal of information provided on policies (such as recruitment and training).</p> <p><b>2 marks</b></p>

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			training. <b>4 marks</b>	
<b>Promotional plans (4 marks)</b>	Plan fully meets Specification requirements. Doesn't suggest many further additions. <b>4 marks</b>	Plan meets Specification requirements but does not provide much detail. Demonstrates good knowledge of appropriate local media channels. <b>3.5 marks</b>	Fully meets Specification requirements and sets out a number of additional ideas such as schools competitions. Links to national Environmental days/events (such as walk to school week etc). A varied and appropriate media mix set out. Also propose re-branding and adding equipment to the Energy bus with funding from a corporate partner. <b>4 marks</b>	Does not directly reference specification requirements, although demonstrates a structured approach. Sets out some nice website features. This section response is brief. <b>2 marks</b>
<b>Measuring &amp; reporting on financial and operational performance (4 marks)</b>	Meets specification requirements but lacks detail in some places as to how information would be gathered and used. <b>3 marks</b>	Lists data that will be collected, which is in line with specification requirements, but does not set out how data will be reported or used. <b>3 marks</b>	Propose project board, which will receive regular performance reports.  Will agree set of Key Performance Indicators with the council(s). <b>3.5 marks</b>	Sets out a structured approach with clear objectives and targets. However, it is not clear on how targets have been set and it is questionable as to how achievable some of them may be.  Adequate financial reporting and expenditure control measures are set out.  A reporting timeline is also set out. <b>2 marks</b>
<b>Obtaining feedback from recipients (4 marks)</b>	Would gain views from teachers and pupils. Provide some quantitative examples from other projects/contracts. <b>3 marks</b>	This area was not covered in any detail within the response. <b>1 mark</b>	Would gain feedback from recipients (teachers and pupils), but not much detail provided. Feedback results would be linked to staff appraisal.	Will develop three case study schools per annum. Also provide feedback forms for teachers and students. Dictaphones will also be used for instant feedback.

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			A wider community evaluation also proposed. <b>3 marks</b>	Example/draft reporting form provided. <b>3 marks</b>
<b>Use &amp; maintenance of Energy bus (8 marks)</b>	Seek to limit liability for repair costs to £3000 per year. Plan to discuss parking options with OCC and will fund up to £1000 per yr. Not a great deal of information provided on how bus will be used. <b>4 marks</b>	Response considers bus usage and driver training. Parking to be provided in Oxford. <b>5 marks</b>	Plan to refit the bus with some high-tech equipment used on other contracts and replace the exterior vinyl. Costs underwritten by Tenderer, although seeking sponsorship from corporate partner. Three parking locations set out within Oxfordshire. Driver training and safety were not considered. <b>6 marks</b>	Considers how waste displays can be integrated within the Energy Bus.  Driver training, risk assessment and regular visual checks set out for bus use. Secure parking provided. <b>7 marks</b>
<b>Delivery within budget &amp; funding split (4 marks)</b>	Demonstrate appreciation of required funding split and have previous similar experience on another contract.  Highlight areas where combined bid brings efficiency savings over separate services (reduced/shared overheads and management charge) <b>3 marks</b>	Good project management approach set out.  Simple approach to funding split set out - bookings unavailable once budget spent.  Highlight areas where combined service offers benefits, but these are not quantified. <b>2 marks</b>	Highlight a number of areas where combined offering provides value for money.  A number of contributions from corporate partners and their own reserves are set out. <b>3 marks</b>	Set out benefits of combined service, mainly additional staff resource. Little detail provided in this section. <b>1 mark</b>
<b>Total (out of 50)</b>	<b>35.5 marks</b>	<b>33.5 marks</b>	<b>41.5 marks</b>	<b>29.5 marks</b>

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### Annex 1B – Financial Evaluation

1. A value for money check was first applied to ensure that Tenders were within the current revenue budget allocation.
2. The score a particular Tender received was then calculated based on the Tender's percentage deviation from the mean cost of all scenarios evaluated. The scoring framework was linear in nature. Deviations in bids above the mean had the same impact on the score received as deviations below the mean.
3. The following framework was utilised: The mean scored 5 points and scores could vary between 0 and 10. A deviation from the mean of greater than or equal to +33% scored 0 and a deviation of less than or equal to –33% scored 10. All scores between 0-10 were possible. The scoring formula used was as follows:
4. Calculated Score =  $5 - ((\text{Deviation from Derived Mean})\% * (15))$
5. Table A1.B provides some example deviations and accompanying scores based on the formula above:

**Table A1.B – Evaluation scoring methodology for criteria**

Deviation from Mean	Score
+33%	0
+15%	2.75
+10%	3.50
+5%	4.25
No deviation	5.00
-5%	5.75
-10%	6.50
-15%	7.25
-33%	10.00

6. The raw score (out of 10) was then weighted in line with the pricing criterion weighting of 40%. Finally scores were ranked.

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7. A summary of the financial evaluation is set out below. From this it can be seen that Tenders 2, 3 and 4 are very similar in value. All have bid up to or very near to the affordability limit set out. Tender 1 offers a £10,268 saving over 2 years (approximately £5,100 per year). This represents a saving over two years of £7,118 to OWP and £3,080 to OCC (reflecting the 70:30 funding balance between the waste and energy parts of the contract).

Table A1.C Financial evaluation

		Tender 1	Tender 2	Tender 3	Tender 4	Mean
<b>Part 1 - Waste Management (TOTAL 2yr Cost)</b>		157,197	160,320	160,200	159,689	159,352
<b>Part 1 Affordability</b>	<b>VfM</b>   <b>YES</b>	160,320	160,320	160,320	160,320	
	% Deviation	-1.4%	0.6%	0.5%	0.2%	
	Score	5.20	4.91	4.92	4.97	
	% Score out of 40%	20.8%	19.6%	19.7%	19.9%	
	Ranking	1	4	3	2	
<b>Part 2 - Energy Bus (TOTAL 2yr Cost)</b>		57,405	60,000	60,000	59,918	59,331
<b>Part 2 Affordability</b>	<b>VfM</b>   <b>YES</b>	60,000	60,000	60,000	60,000	
	% Deviation	-3.2%	1.1%	1.1%	1.0%	
	Score	5.49	4.83	4.83	4.85	
	% Score out of 40%	21.9%	19.3%	19.3%	19.4%	
	Ranking	1	3	3	2	
<b>Part 3 - Single Environmental Programme (TOTAL 2yr Cost)</b>		209,932	220,320	220,200	220,272	217,681
<b>Part 3 Affordability</b>	<b>VfM</b>   <b>YES</b>	220,320	220,320	220,320	220,320	
	% Deviation	-3.6%	1.2%	1.2%	1.2%	
	Score	5.53	4.82	4.83	4.82	
	% Score out of 40%	22.1%	19.3%	19.3%	19.3%	
	Ranking	1	2	2	2	

8. The cost per school visit for each Tender was also calculated by dividing the total tender cost over the two-year contract term by the proposed number of school visits (one or more days input at each school). The results are given in table A1.D. From this it can be seen that Tender 3 has the lowest cost per school visit.

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Table A1.D Cost per school visited

	Tender 1			Tender 2			Tender 3			Tender 4		
	<u>Part 1 Waste</u>	<u>Part 2 Energy</u>	<u>Part 3 combined</u>	<u>Part 1 Waste</u>	<u>Part 2 Energy</u>	<u>Part 3 combined</u>	<u>Part 1 Waste</u>	<u>Part 2 Energy</u>	<u>Part 3 combined</u>	<u>Part 1 Waste</u>	<u>Part 2 Energy</u>	<u>Part 3 combined</u>
Total 2 year cost	£ 157,197	£ 57,405	£ 209,932	£ 160,320	£ 60,000	£ 220,320	£ 160,200	£ 60,000	£ 220,200	£ 159,689	£ 59,918	£ 220,272
Cost per school visited	£ 749	£ 820	£ 750	£ 746	£ 1,200	£ 734	£ 728	£ 500	£ 688	£ 1,879	£ 1,872	£ 1,468
Rank	6	8	7	5	9	4	<b>3</b>	<b>1</b>	<b>2</b>	12	11	10