



**PROCUREMENT OF PEST CONTROL SERVICES**  
**Reference Number PRO 023**

Invitation to Tender (ITT)

Tender Assessment and Assessment Methodology – Schedule 2

# 1 Tender Assessment

## 1.1 General

This procurement is being conducted by Cadarn Group on behalf of Cadwyn Housing Association Limited (“Cadwyn”) and Newydd Housing Association (1974) Limited (“Newydd”) (together referred to as the “Contracting Authorities”). The outcome of this procurement will be the award of a single contract covering the provision of the Services to both Contracting Authorities.

Tender responses must comply, without amendment, caveat or qualification, with the requirements set out in this Invitation to Tender (ITT) and be consistent with the provisions of the Contract. In particular, Tender responses must provide for delivery of all of the Services described within the Specification (Schedule 3) and must not impose, expressly or by implication, any additional obligations upon the Contracting Authorities.

Tender responses will be scrutinised initially to check completeness and compliance with the above requirements. In the event that a Tender contains qualifications, conditions or departures that result in non-compliance with the requirements of this ITT, the Contracting Authorities reserve the right not to carry out any further evaluation of that Economic Operator’s submission and to reject the Tender as non-compliant.

Economic Operators must complete and submit the Pricing Schedule (Schedule 4b) in full and in accordance with the instructions provided. The Contract will be awarded on the basis of the Most Advantageous Tender (“MAT”), taking into consideration the highest combined weighted score for Quality (40%) and Price (60%) using the award criteria and assessment methodology set out in this Schedule.

Failure to provide information to the level of detail prescribed may result in the Contracting Authorities rejecting an Economic Operator’s Tender. Economic Operators should provide such information as is necessary to enable the Contracting Authorities to fully evaluate the benefits, risks and value for money offered.

The assessment will be based solely on the information provided in the response to this ITT and any subsequent written responses to clarification questions. During the assessment process, the Contracting Authorities reserve the right to request clarification from Economic Operators to assist in their consideration of a Tender. Clarification requests will not permit material amendment of a Tender.

Although it is currently intended that the procurement will proceed in accordance with the provisions of this ITT, the Contracting Authorities reserve the right to terminate, amend or vary the procurement process at any time.

If an Economic Operator does not request clarification in respect of any aspect of the ITT documentation, the Contracting Authorities shall be entitled to assume that the documentation has been fully understood.

A breakdown of the Procurement Specific Questionnaire (Exclusion Grounds and Conditions of Participation), award criteria and detailed assessment methodology is provided in Section 2 of this Schedule.

## 1.2 Assessment steps

The assessment process will comprise five key stages:

- Stage 1 – Preliminary Compliance Check
- Stage 2 – Pass/Fail Evaluation of the Procurement Specific Questionnaire (PSQ), incorporating Exclusion Grounds and Conditions of Participation
- Stage 3 – Quality Evaluation (40%)
- Stage 4 – Cost Evaluation (60%)
- Stage 5 – Preferred Economic Operator / Contract Award

Each stage must be successfully passed before progressing to the next stage of the evaluation process.

Only those Economic Operators achieving a “Pass” at Stages 1 and 2 and meeting the minimum quality threshold at Stage 3 will proceed to Stage 4 (Cost Evaluation).

### **Stage 1 – Preliminary Compliance Check**

Tenders will be scrutinised by Cadarn Group on behalf of Cadwyn Housing Association Limited and Newydd Housing Association (1974) Limited (together referred to as the “Contracting Authorities”) to confirm compliance with the requirements set out in this ITT.

The Compliance Check will verify that each Tender:

- Complies with all the provisions of the ITT;
- Includes a completed and signed Form of Tender and required declarations (including Certificates of Non-Collusion and Non-Canvassing, where applicable);
- Provides responses to all required questions within the Response Schedule;
- Includes a fully completed Pricing Schedule (Schedule 4a); and
- Is submitted in the format, medium and by the deadline specified.

Where a Tender is non-compliant in one or more areas, the Contracting Authorities will determine whether to seek clarification or to reject the Tender at this stage. Clarifications will not permit material amendment of a Tender.

The Contracting Authorities reserve the right, at their sole discretion, not to carry out any further evaluation of an Economic Operator’s submission where it is concluded that the Tender is materially non-compliant.

### **Stage 2 – Pass/Fail Evaluation of each Economic Operator’s Procurement Specific Questionnaire (PSQ) which incorporates Exclusion Grounds and Conditions of Participation (Section A of Schedule 4b)**

Following completion of Stage 1, the Contracting Authorities will evaluate Section A of Schedule 4b (Procurement Specific Questionnaire).

The PSQ incorporates:

- Preliminary supplier declarations and confirmation of Central Digital Platform (CDP) registration;
- Mandatory and discretionary exclusion grounds;
- Debarment list confirmation;
- Associated persons and intended subcontractor exclusion checks; and
- Conditions of Participation relating to legal, financial and technical capacity.

All PSQ questions will be assessed on a **Pass/Fail basis**.

Failure to provide a response to any mandatory question, including failure to provide a valid CDP unique identifier where required, may result in a Fail and exclusion from further evaluation.

### **Exclusion Grounds and Debarment**

Where an Economic Operator indicates that:

- A mandatory exclusion ground applies; or
- They (or any relevant associated person) are listed on the Debarment List for a mandatory excluded reason;

the Tender will be rejected unless satisfactory self-cleaning evidence is submitted and accepted.

Where discretionary exclusion grounds are indicated, the Contracting Authorities will assess the circumstances and any self-cleaning evidence provided, applying principles of proportionality and risk.

This assessment may extend to:

- Consortium Members;
- Associated persons; and
- Intended subcontractors relied upon to meet Conditions of Participation.

The Contracting Authorities reserve the right to request clarification or further supporting evidence in relation to any exclusion declaration.

### **Conditions of Participation**

Conditions of Participation (as specified in Schedule 4b) will be assessed on a Pass/Fail basis and may include requirements relating to:

- Financial standing;
- Required levels of insurance;

- Legal capacity;
- Data protection capability;
- Relevant experience;
- Supply chain management; and
- Health & Safety management arrangements.

Failure to meet any mandatory Condition of Participation may result in exclusion from further evaluation.

Where documentary evidence is requested, failure to provide such evidence within the specified timeframe may result in exclusion or amendment of the contract award decision.

### **Consortium Submissions**

Where a Tender is submitted by a Consortium:

- Each Consortium Member must complete the relevant PSQ elements; and
- Each Consortium Member must achieve a Pass.

Failure of any Consortium Member to achieve a Pass may result in exclusion of the entire Tender.

### **Misrepresentation**

Any material misrepresentation within the PSQ may result in exclusion from the procurement process. Where misrepresentation is discovered following contract award, the Contracting Authorities reserve the right to rescind the Contract and pursue remedies in accordance with applicable legislation.

### **Stage 3 – Quality Evaluation (40%)**

Only Tenders that successfully pass Stages 1 and 2 will proceed to Stage 3 (Quality Evaluation).

Quality submissions will be assessed based on the responses provided in Schedule 4b – Quality Response.

The Quality element accounts for 40% of the overall evaluation score.

Each question will be evaluated independently by members of the evaluation panel. Scores will then be moderated collectively to determine the final moderated score for each question.

### **Quality Award Criteria and Weightings**

<b>Question</b>	<b>Criteria</b>	<b>Weighting</b>
Q1	Service Delivery Approach: resourcing, structure and operational delivery across the Cadarn Group portfolio	30%
Q2	Diagnosis and Reporting: identification of pest type, root cause analysis and reporting standards	25%

Q3	Health and Safety, Competency and Risk Management: accreditations, training, RAMS/COSHH and performance monitoring	15%
Q4a	Tenant Engagement and Communication: respectful interaction, management of access issues and escalation procedures	7%
Q4b	Tenant-Facing Communication Materials: clarity, accessibility and suitability of draft tenant-facing leaflet, reviewed by Cadarn Group Tenant Scrutiny Group	3%
Q5	Social Value and Community Benefits: local employment, training and alignment with the Well-being of Future Generations (Wales) Act	10%
Q6	Environmental Management and Sustainability: treatment methodology, environmental controls and travel efficiency	10%

### Tenant Scrutiny Group Involvement

As part of Q4 (Q4b) (Tenant Engagement & Communication), Economic Operators will be required to submit a draft tenant-facing leaflet or help sheet explaining:

- How tenants report pest issues;
- What tenants can expect during attendance;
- Any preparation requirements;
- Health and safety information; and
- Follow-up actions or advice.

Representatives of the Cadarn Tenant Scrutiny Group (TSG) will review the tenant-facing communication materials submitted under Q4. Their assessment will inform the moderation process and contribute to the final moderated score for Q4.

The final moderated score will remain the responsibility of the evaluation panel.

### Minimum Quality Threshold

A minimum Quality threshold of 60% will apply. Any Tender achieving a total Quality Score of less than 60% will not proceed to Stage 4 (Cost Evaluation).

The minimum quality threshold of 60% is applied to the overall weighted quality score. A submission scoring less than 60% of the total available quality marks across all six questions will not progress to cost evaluation, regardless of individual question scores.

## Scoring Methodology

Each Quality question will be scored on a scale of **0–4**, in accordance with the scoring descriptors set out in the table below.

Each specific question will be evaluated independently by members of the evaluation panel against the criteria for that question as set out in **Schedule 4b – Quality Response**. Scores will then be moderated collectively by the panel to determine the final moderated score for each question. The moderated score shall be final. Responses will be assessed solely against the requirements and evaluation criteria for the relevant question. Economic Operators must ensure that each response is complete and self-contained.

The total Quality Score for each question will be calculated using the following formula:

$$\text{Final Moderated Score} \times \text{Question Weighting} = \text{Weighted Question Score}$$

All weighted question scores will then be aggregated to produce a total Quality Score out of 100%. The total Quality Score will then be multiplied by **40%** to derive the bidder's final weighted Quality Evaluation Score.

Score	Rating	Criteria
4	Excellent/ Outstanding	An excellent response demonstrating that the bidder meets Cadarn Group requirements. The bidder has provided clear and concise evidence (e.g. explanations, screen shots, testimonials, standards, certifications) on how the proposed scheme(s) can meet the requirements including the ability to adhere to defined standards and deliver the service in accordance with the specified requirements.
3	Good	A good response demonstrating that the bidder meets Cadarn Group requirements. The bidder has provided clear and concise evidence giving confidence in the ability to deliver the service in accordance with the specified requirements.
2	Fair	A satisfactory response demonstrating that the bidder mostly meets Cadarn Group requirements. The bidder has provided clear and concise evidence (e.g. explanations, screen shots, testimonials, standards, certifications) on how the proposed scheme of work will be delivered and can mostly meet (greater than 60%) the requirements including the ability to adhere to any defined standards where indicated.
1	Below Required Standard	The response fails to demonstrate a good understanding of Cadarn Group requirements. The requirement can only be partially fulfilled (60% or less) and the evidence provided contained insufficient detail on the proposed solution to deliver the scheme(s) described.
0	Poor or	A very poor response with little or no relevant information provided. The bidder failed to demonstrate satisfactorily how they will deliver the requirement(s) or they have stated that the requirement cannot be met.
0	Fails to respond	Any failure to respond to a specific element will result in a score of 0

## **Stage 4 – Cost Evaluation (60%)**

Only Tenders achieving the minimum Quality threshold at Stage 3 will proceed to Stage 4 (Cost Evaluation).

The Cost element accounts for 60% of the overall evaluation score.

The Cost Evaluation will be based on the Pricing Response submitted in Schedule 4a – PSQ & Pricing Response.

### **Scored Pricing Elements**

The following sections of Schedule 4a will form part of the cost evaluation:

- Sections A–E (Core Reactive and Planned Services)
- Section F (Minor Enabling Works)

Section G (Optional / Consultancy Services) must be completed but will not form part of the cost evaluation scoring.

Section F is evaluated but sub-weighted within the overall cost evaluation score. Sections A–E carry 95% of the cost evaluation score and Section F carries 5%. This reflects that enabling works are core contract scope but indicative quantities are derived from estimated defect identification rates rather than verified historic data. This sub-weighting ensures that pricing variance on Section F does not disproportionately affect the overall evaluation outcome.

### **Unit Rate Structure**

Economic Operators are required to submit a unit rate for both South Wales and Mid Wales for each applicable service line within Sections A–F.

Unit rates must be fully inclusive of:

- Labour
- Travel
- Materials
- Equipment
- Overheads
- Profit

necessary to deliver the services in accordance with the Scope of Services.

### **Indicative Quantities and Geographic Weighting**

Indicative annual quantities are provided for evaluation purposes only. These quantities are not guaranteed and are intended solely to enable consistent tender comparison.

For evaluation purposes, the Contracting Authorities will apply a geographic weighting reflecting the anticipated distribution of service demand:

- 85% South Wales
- 15% Mid Wales

This weighting will be applied to the submitted regional unit rates to calculate a weighted unit rate for each service line.

## Evaluated Tender Price Calculation

For each service line within Sections A–F, the following methodology will be applied:

1. A weighted unit rate will be calculated using the submitted South Wales and Mid Wales rates and the geographic weighting (85% South Wales / 15% Mid Wales);
2. The weighted unit rate will be multiplied by the relevant indicative quantity to derive an evaluated line total;
3. All evaluated line totals within Sections A–E will be aggregated to produce a Section A–E subtotal, and all Section F line totals will be aggregated to produce a Section F subtotal;
4. The Section A–E subtotal will be multiplied by 95% and the Section F subtotal by 5%. These two figures will be combined to produce the Total Evaluated Tender Price used for price scoring.

The Total Evaluated Tender Price will be used solely for the purpose of determining the Cost Evaluation score.

### Price Scoring Formula

The following formula will be applied to determine the Cost Evaluation Score:

$$(Lowest\ compliant\ evaluated\ tender\ price \div Economic\ Operator's\ evaluated\ tender\ price) \times 60$$

The Economic Operator submitting the lowest compliant evaluated tender price will receive the full 60%.

All other compliant Tenders will receive a proportionate score.

### Abnormally Low Tenders

The Contracting Authorities reserve the right to seek clarification where a Tender appears to be abnormally low, including in relation to:

- Core service rates (Sections A–E);
- Minor enabling works rates (Section F); and
- Optional service rates (Section G).

Where, following clarification, the Contracting Authorities determine that a Tender is unsustainable or presents material delivery risk, the Tender may be rejected.

### Stage 5 - Preferred Economic Operator/Contract Award

Following completion of Stages 1–4, the Quality Evaluation Score (40%) and the Cost Evaluation Score (60%) for each compliant Tender will be added together to produce a total overall evaluation score out of 100%.

The Economic Operator achieving the highest total combined score will be identified as the **Preferred Economic Operator**, subject to:

- Successful completion of any required due diligence checks;

- Verification of information provided within the Tender submission; and
- Final internal approval in accordance with the Contracting Authorities' governance procedures.

The Contracting Authorities reserve the right not to award the Contract if no Tender is considered sufficiently robust, economically viable, or capable of delivering the requirements.

The Contract will be awarded to a single Economic Operator.

### Example of Overall Score Calculation (Illustrative Only)

The table below demonstrates how final scores are combined. This example is provided for illustration purposes only.

Economic Operator	Quality Score (40%)	Price Score (60%)	Total Score (100%)
1	32	42	74
2	28	60	88
3	36	36	72
4	34	48	82

In this example, **Economic Operator 2** achieves the highest overall score and would therefore be identified as the Preferred Economic Operator.