



"Building Better Standards"

INVITATION TO NEGOTIATE EVALUATION WORKBOOK

OCTOBER 2003

Name of Reviewer.....

Name of Constructor Team.....

Contents

1.0	OVERVIEW OF WORKBOOK.....	0
2.0	SUMMARY SCORE SHEET	0
3.0	EVALUATION OF WRITTEN PROPOSALS.....	0
4.0	INTERVIEWS & PRESENTATIONS.....	0
5.0	OVERALL CONSISTENCY	0
6.0	REALITY CHECK FACTOR	0
7.0	FINANCIAL PROPOSALS.....	0

1.0 OVERVIEW OF WORKBOOK

Purpose of Workbook

The following workbook has been prepared to assist the Review Panel when evaluating of the Invitation to Negotiate submissions. It has two primary functions:

- To provide guidance on the evaluation criteria
- To record the thoughts and comments of the Reviewer during the evaluation process

Section Headings

The following sections of the workbook have been formatted in accordance with the following elements of the selection process:

- Overall Summary Score Sheet
- Written Proposals
- Interviews & Presentations
- Overall Consistency
- Reality Check Factor
- Financial Proposals

Contents of Each Section

Each section contains:

- Summary of the Evaluation Criteria
- Scoring Sheets for each question/section
- Summary Score Sheet

The scores for each section need to be transferred onto the Summary Score Sheet on the following page.

Scoring Principles

The following scoring principles should be used during the evaluation process:

Score	Scoring Principles
0	Rejected – Evidence is unacceptable or non-existent, or there is a failure to properly address any issues.
1-3	Poor – The evidence is deficient in certain areas where the details of relevant evidence require the reviewer to make assumptions.
4-6	Satisfactory – The evidence is acceptable, but with some minor reservations. The response deals only with processes and little output evidence is provided.
7-8	Good – The standard of evidence fully meets expectations.
9-10	Outstanding – The standard of evidence exceeds expectations. The response demonstrates clear and strong evidence of delivery as part of an integrated team and how this has become part of a continuous improvement process.

2.0 SUMMARY SCORE SHEET

Paul Miller will undertake the review of the Financial Proposals to enable the following summary score sheet to be completed during the final team review on 27th October 2003.

Overall Summary Score Sheet			
Constructor Team Name			
Quality Evaluation	Marks out of 10	Weighting	Weighted Scores
Written Proposals		25%	
Interview & Presentation		35%	
Overall Consistency		10%	
Quality Score			
Multiply by Reality Check Factor (100% max.)			X ()%
Final Quality Score (70% max.)			
Cost Evaluation	Marks out of 10	Weighting	Weighted Scores
Financial Proposal		30%	
Total Score			

3.0 EVALUATION OF WRITTEN PROPOSALS

The following table is a summary of the Evaluation Criteria for the written proposals. A more detailed version of the above criteria is contained in Appendix A. When reviewing the written proposals, please record your comments and your score out of 10 in the scoring sheets on the following pages. The scores should then be transferred into the summary score sheet at the end of this section.

Summary of Evaluation Criteria					
Primary Objectives	Secondary Objectives		Quality Proposal Question	Marking Criteria	Weighting
Deliver an effective design & delivery process	Reduce Uncertainty		A1 – Project Delivery	"What systems and processes do they have, which will help us to achieve our objectives (ie. to deliver an effective design and delivery process)?"	20%
	Deliver Best Value	Cost			30%
		Time			
		Quality			
	Reduce Red Tape				5%
	Involve key stakeholders in design process from outset		A2.1 – Team Details	"What people do they have, who will help us to achieve our objectives (ie. to deliver an effective design and delivery process)?"	15%
Harness Innovation		A2.3 – Long-Term Aspirations	"What ideas do they have for helping us to achieve our objectives (ie. All or any of the Primary Objectives)?"	10%	
Raise educational standards for all	<ul style="list-style-type: none"> • Provide Opportunities for All • Improve the environment for working and learning through better design • Change cultures and aspirations 		A2.2 – Regenerating the Local Community	"What ideas do they have for helping us to achieve our objectives (ie. To raise educational standards for all and contribute to neighbourhood renewal)?"	10%
Contribute to neighbourhood renewal	<ul style="list-style-type: none"> • Improve training, re-population & quality of life • Focus schools at centre of community • Widen educational perspectives of community • Contribute to Manchester City Council's long-term strategy 				10%
					100%

Evaluation of Written Proposals Scoring Sheet

A1 – Project Delivery

Manchester City Council's Education Department has traditionally procured works once they have reached detailed design stage. This Framework is looking to derive benefits through an earlier involvement of its supply chain partners. Explain how your Team's **systems and processes** would deliver real benefits to the council through an earlier involvement in the **concept design and feasibility stage**.

NB – Evidence provided in question **B2 – Proposals for Incentive Mechanisms** may be relevant to their current performance measurement procedures

Marking Criteria

*“What **systems and processes** do they have, which will help us to achieve our objectives (ie. To deliver an effective **design and delivery process**)?”*

Do the proposals demonstrate that the Teams, not only have these systems and processes, but also that they are being used and are fully understood by the staff and employees? Examples of the sorts of systems and processes include:

- Understanding the **Client Brief**
- Understanding **Stakeholder’s Requirements**
- Use of **Project Management Plans**
- Active **Risk and Value Management**
- **Quality Management** procedures for **zero defects**
- **Whole Life Costing**
- **Benchmarking** of costs
- **Open Book Accounting**
- **Contract Management** procedures
- **Forecasting Tools** (programmes & costs)
- Strong **safety** culture
- **Commissioning & Handover** procedures
- Active **Supply Chain Management**
- **Performance Measurement** procedures – KPIs etc.
- **IT/Communications Strategies** – communication of information between companies

Strengths

Weaknesses

--	--

SCORE (out of 10)

Evaluation of Written Proposals Scoring Sheet

A2.1 – Team Details

Provide an organisation chart showing **all** intended members of your team and their curriculum vitae. Describe where appropriate, what contributions they will make to the Framework Management Group, the development of the **design** and how the various members will **work cohesively as a team** through to **construction and handover**. Explain both the commercial and working relationships between the various parties.

Marking Criteria

*“What **people** do they have, who will help us to achieve our objectives (ie. to deliver an effective **design and delivery process**)?”*

We need to understand that they have a real team who are open and accessible; and who can work together with us in a constructive and collaborative way. Questions to ask yourself are:

- Check that the team members do have the right experience ie. Schools work.
- Have they worked together before?
- Are all the segments of the supply chain represented?
- Is the team well-balanced?
- Is there evidence to suggest they will be able to work together with us?

Strengths

Weaknesses

--	--

SCORE (out of 10)

Evaluation of Written Proposals Scoring Sheet

A2.2 – Regenerating the Local Community

Stakeholders in this initiative have consistently emphasised the importance of this Framework contributing to the wider agenda of **raising educational standards** and **providing opportunities** for training and **neighbourhood renewal**. Outline how your team will contribute to this process

Marking Criteria

*“What **ideas** do they have for helping us to achieve our objectives (ie. **To raise educational standards for all and contribute to neighbourhood renewal**)?”*

These are both longer-term objectives of the framework, which would be delivered as a result of the decisions made by the Framework Management Group. We need evidence that the Teams are willing to progress these objectives and have ideas for how this might be done. Examples include:

- How do they propose to involve key stakeholders in the design process?
- Which stakeholders do they propose to involve?
- Will they run stakeholder consultation workshops?
- How does this translate into the final design?
- Do they have proposals for training the local workforce?
- Do they consider issues wider than the teaching of school children?
- How would the Teams support the Local Community?

Strengths

Weaknesses

SCORE (out of 10)

Evaluation of Written Proposals Scoring Sheet

A2.3 – Long-Term Aspirations

*“What **ideas** do they have for helping us to achieve our objectives (ie. All or any of the Primary Objectives)?”*

We want to work with Teams that will work with us to develop and evolve. Not only are we interested in what they do currently, but we are also keen to see what further ideas they have for how we can develop together to harness innovation. We need evidence that they are a flexible organisation that embraces change. Ideas might include:

- **Continuous Improvement**
- **Performance Measurement**
- **Whole Life Costing**
- **Benchmarking** (Cost, Time & Quality)

Marking Criteria

Manchester City Council want to build on **the learning and experience** of its Framework partners to **develop and improve** the way in which it delivers projects in the future. Outline how you would like to see this **relationship** develop over the next 3-5 years.

NB – Evidence provided in question **B2 – Proposals for Incentive Mechanisms** may be relevant to their future performance measurement procedures

Strengths

Weaknesses

--	--

SCORE (out of 10)

Summary Score Sheet for Written Proposals			
Constructor Team Name		Name of Assessor	
Quality Evaluation	Marks out of 10	Weighting	Weighted Scores
A1 – Project Delivery <ul style="list-style-type: none"> • Reduce Uncertainty • Deliver Best Value • Reduce Red Tape 		55%	
A2.1 – Team Details <ul style="list-style-type: none"> • Involve key stakeholders in design process from outset 		15%	
A2.2 – Regenerating the Local Community <ul style="list-style-type: none"> • Raise Educational Standards for All • Contribute to Neighbourhood Renewal 		20%	
A2.3 – Long-Term Aspirations <ul style="list-style-type: none"> • Harness Innovation 		10%	
Quality Score			

4.0 INTERVIEWS & PRESENTATIONS

5.0 OVERALL CONSISTENCY

6.0 REALITY CHECK FACTOR

7.0 FINANCIAL PROPOSALS

APPENDIX A – EVALUATION CRITERIA FOR WRITTEN PROPOSALS

Primary Objectives	Secondary Objectives	Quality Proposal Question	Marking Criteria	Weighting
Deliver an effective design & delivery process	Reduce Uncertainty	A1 – Project Delivery Manchester City Council's Education Department has traditionally procured works once they have reached detailed design stage. This Framework is looking to derive benefits through an earlier involvement of its supply chain partners. Explain how your Team's systems and processes would deliver real benefits to the council through an earlier involvement in the concept design and feasibility stage. NB – Evidence provided in question B2 – Proposals for Incentive Mechanisms may be relevant to their current performance measurement procedures	<i>"What systems and processes do they have, which will help us to achieve our objectives (ie. to deliver an effective design and delivery process)?"</i> Do the proposals demonstrate that the Teams, not only have these systems and processes, but also that they are being used and are fully understood by the staff and employees? Examples of the sorts of systems and processes include: <ul style="list-style-type: none"> Understanding the Client Brief Understanding Stakeholder's Requirements Use of Project Management Plans Active Risk and Value Management Quality Management procedures for zero defects Whole Life Costing Benchmarking of costs Open Book Accounting Contract Management procedures Forecasting Tools (programmes & costs) Strong safety culture Commissioning & Handover procedures Active Supply Chain Management Performance Measurement procedures – KPIs etc. IT/Communications Strategies – communication of information between companies 	20%
	Deliver Best Value		<ul style="list-style-type: none"> Cost Time Quality 	30%
	Reduce Red Tape		5%	
	Involve key stakeholders in design process from outset	A2.1 – Team Details Provide an organisation chart showing all intended members of your team and their curriculum vitae. Describe where appropriate, what contributions they will make to the Framework Management Group, the development of the design and how the various members will work cohesively as a team through to construction and handover. Explain both the commercial and working relationships between the various parties.	<i>"What people do they have, who will help us to achieve our objectives (ie. to deliver an effective design and delivery process)?"</i> We need to understand that they have a real team who are open and accessible, and who can work together with us in a constructive and collaborative way. Questions to ask yourself are: <ul style="list-style-type: none"> Check that the team members do have the right experience ie. Schools work. Have they worked together before? Are all the segments of the supply chain represented? Is the team well-balanced? Is there evidence to suggest they will be able to work together with us? 	15%
	Harness Innovation	A2.3 – Long-Term Aspirations Manchester City Council want to build on the learning and experience of its Framework partners to develop and improve the way in which it delivers projects in the future. Outline how you would like to see this relationship develop over the next 3-5 years. NB – Evidence provided in question B2 – Proposals for Incentive Mechanisms may be relevant to their future performance measurement procedures	<i>"What ideas do they have for helping us to achieve our objectives (ie. All or any of the Primary Objectives)?"</i> We want to work with Teams that will work with us to develop and evolve. Not only are we interested in what they do currently, but we are also keen to see what further ideas they have for how we can develop together to harness innovation. We need evidence that they are a flexible organisation that embraces change. Ideas might include: <ul style="list-style-type: none"> Continuous Improvement Performance Measurement Whole Life Costing Benchmarking (Cost, Time & Quality) 	10%
Raise educational standards for all	<ul style="list-style-type: none"> Provide Opportunities for All Improve the environment for working and learning through better design Change cultures and aspirations 	A2.2 – Regenerating the Local Community Stakeholders in this initiative have consistently emphasised the importance of this Framework contributing to the wider agenda of raising educational standards and providing opportunities for training and neighbourhood renewal. Outline how your team will contribute to this process.	<i>"What ideas do they have for helping us to achieve our objectives (ie. To raise educational standards for all and contribute to neighbourhood renewal)?"</i> These are both longer-term objectives of the framework, which would be delivered as a result of the decisions made by the Framework Management Group. We need evidence that the Teams are willing to progress these objectives and have ideas for how this might be done. Examples include: <ul style="list-style-type: none"> How do they propose to involve key stakeholders in the design process? Which stakeholders do they propose to involve? Will they run stakeholder consultation workshops? How does this translate into the final design? Do they have proposals for training the local workforce? Do they consider issues wider than the teaching of school children? How would the Teams support the Local Community? 	10%
Contribute to neighbourhood renewal	<ul style="list-style-type: none"> Improve training, re-population & quality of life Focus schools at centre of community Widen educational perspectives of community Contribute to Manchester City Council's long-term strategy 			10%
				100%

