

APPENDIX D: TENDER EVALUATION MATRIX

Level 1		Level 2			Level 3		Summary		Question	Guidance / Information Made Available to Developers to Inform their Responses	Word Limit
Criterion	Weighting	Criterion	Weighting		Criterion	Weighting	Overall Weight	Overall Rank			
Deliverability of the Commercial Offer This section of the ITSFT has been designed to test the ITFT Developers proposal for the strategic Developership arrangement, focusing on the structure, financing and methodology for delivery		Deliverability and Risk Developers will be tested on their commercial proposals, including their level of risk acceptance and how they will fund the project.	27%	a	Business Plan	37%	10.00 %	3	Can you fully demonstrate that you can deliver a commercially viable project by providing a fully costed business plan in the format provided?	Please provide a cost proforma in the format provided. This section will assess the capital receipt element of the viability located on cell H74 of your financial proforma, this will be scored by: The highest anticipated land value payment will be awarded 100%. Lower land value payments will be awarded a percentage based on the value proportionate to the lowest land value payment received (e.g., a land value payment of £9 would be awarded	Response should be in the form of the template proforma only - no appendices.

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										a score of 90% if the highest land value payment is £10). Minus values will score 0 in this section.	
				b	Financial Commitment	22%	5.80%	8	How will you fund the development? What evidence have you provided to confirm this?	None - will link into BP above	1000 words excluding letters of support.
				c	Acceptance of Risk	22%	5.80%	8	What is your approach to managing/sharing risk for this development? What assumptions/ exclusions have been made in the costed business plan and how will these be resolved. Will the business plan need to be amended to reflect the resolutions to these assumptions/ exclusions?		No word limit

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				d	Commercial Returns	20%	5.40%	8	What level and timing of commercial returns are you expecting to achieve?	<p>This section will test the viability robustness of income inputs.</p> <p>Please provide any supporting information which validates the income inputs and associated timing for your financial proforma, this will be reviewed against standards set out in the output specification along with consistency of documents requested throughout this matrix</p>	No word limit
		Development Cost and Viability	8%	e	Delivery Cost for Development	33%	2.70%	16	What information has been developed to validate the cost inputs in your submission.	<p>This section will test the robustness of cost inputs of the financial proforma.</p>	No word limit

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										Please provide any supporting information which validates the cost inputs in your business plan, this will be reviewed against standards set out in the output specification along with documents requested throughout this matrix	
		This section will test Developers more deeply on their financial proposals for the strategic Developership.		f	Viability Tests / Quantum of Guaranteed Development	33%	2.70%	17	Are your phasing proposals subject to future viability testing and/or subject to achieving future sales rates?	None	1000 words excluding diagrams.
				g	Contracting Strategy	33%	2.70%	17	What is your commercial strategy for delivering the project?	None - there is a link to social value strategy, but this will be for them to resolve	1000 words. No appendices.
		Strategic Developer Structure/Offe r	6%	h	Structure & Governance incl Job Descriptions	50%	3.00%	12	What are your proposed governance structures for delivering the project?	None - will link into BP above	1000 words excluding diagrams.

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		This section tests Developers proposals for the strategic Developership arrangement, how they propose to work with the Council to deliver the project and to demonstrate a suitable level of resource will be provided to ensure successful delivery.		i	General Management Arrangements	50%	3.00%	12	What management methodology do you propose?	None	1000 words excluding diagrams.
		Delivery Methodology This section tests	5%	j	Programme	50%	2.40%	14	What is your development programme?	None	750 words, excluding programme which should not exceed 4 sides A3.

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		Developers on their approach to delivering the development outputs.		k	Sales and Marketing Strategy	50%	2.40%	14	What is your sales and marketing strategy for each of the residential and commercial offers within the overall project proposal, reflecting your phasing strategy?	None	1000 words excluding pictures/diagrams. No appendices.
Development Outcomes This section tests the Developers on the quality of the outcomes being delivered by the Strategic Developer, focusing on their strategy for delivery, compliance with		Development Outcomes This section tests Developers on the quality of the outcomes to be delivered, and compliance with the Councils Output Specification.	37%	l	Design Standards	31%	11.30%	1	What is your approach to delivering a high-quality development? The submission should include a vision statement and masterplan, layouts, massing and elevations to demonstrate your approach paying regard to the details contained within the output specification.	Output Specification requirements	2000 words for the vision statement and an additional 1000 word explanatory text to support pictures/diagrams and mood board. No appendices.
				m	Development	25%	9.10%	4	What numbers, sizes, types and indicative layouts are you proposing for the private residential properties with regard to the details contained within the Output Specification and what % of affordable housing are you offering overall and what numbers, types,	Output Specification requirements	2000 words excluding pictures/diagrams. No appendices.

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Council requirements and innovative solutions for delivering said outcomes									tenure and locations are being proposed for these properties?		
				n	Development	13%	4.60%	11	What number, size and location of commercial units are you offering?	Output Specification requirements	2000 words excluding pictures/diagrams. No appendices.
				o	Development Offer - Public Realm	18%	6.50%	6	What is your offer in terms of public realm for the development having specific regard to the requirements in the Output Specification.	Output Specification requirements	2000 words excluding pictures/diagrams. No appendices.
				p	Development Offer Community Facilities	15%	5.40%	7	What is your offer for the provision of community facilities, where is it located and how does it meet the requirements of the output spec?	Output Specification requirements	2000 words excluding pictures/diagrams. No appendices.
		Sustainability Strategy	9%								
		This section tests Developers on their compliance with the Councils Output		q	Sustainability Proposals	100%	9.00%	2	What is your proposed strategy to achieve the Council's sustainability requirements, and will it achieve the Building with Nature accreditation?	Output Specification requirements	1000 words excluding pictures/diagrams. No appendices.

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		Specification, and their innovative solutions for Sustainability.									
		Social Value This section tests Developers on their compliance with the Councils Output Specification, and their innovative solutions for Social Value.	8%	r	Social Value Proposals	100%	8.00%	5	What is your proposed social value strategy for the project?	Output Specification requirements	1000 words excluding pictures/diagrams. No appendices.

Evaluation Methodology

Score	Definition	Assessment
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5	A comprehensive response has been submitted providing reassurance in relation to all facets of the question with no negative aspects or inconsistencies. Beyond this the response exceeds the expectations set within the questions and is considered to offer added value to the client.	Excellent
4	A comprehensive response has been submitted providing reassurance in relation to all facets of the question with no negative aspects or inconsistencies.	Good
3	The response responds to all of the points asked in the question with minor concerns with the submission.	Mostly Satisfactory
2	The response does not respond to all of the points asked in the question and there are minor concerns with the submission.	Mostly Unsatisfactory
1	The response responds to some, or all of the points asked in the question with major concerns.	Unsatisfactory
0	No response provided, or response is non-compliant and bears little resemblance to the question asked.	Unacceptable