

APPENDIX A

Tender Evaluation Report

**Somerset Council Revenues and Benefits
Application Consolidation**

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1. Management Summary

This process was for the supply and implementation of a Revenues and Benefits application to allow Somerset Council to deliver a Revenues and Benefits Service. The exercise was used to identify a preferred supplier before we utilise the Authority's Software Reseller Framework to award a contract.

This system will be used for the administration of Council Tax, Non-Domestic Rates (Business Rates), Housing Benefits (including Discretionary Housing Payments and the invoicing and recovery of Housing Benefit overpayments) and the Council Tax Reduction scheme. The Council may also need to use software to enable the administration of Business Improvement Districts (BIDs) including Enterprise Zones.

2. Procurement Process

This procurement was carried out in accordance with the authority's Contract Procedure Rules and Standing Orders and Public Contracts Regulations 2015.

Suppliers were invited to submit a response to this request for quotation on 28th February 2024.

Following an initial compliance check, the bids were circulated to the evaluation team to review and conduct their initial evaluation. A moderation meeting took place on 2nd April 2024.

2.1. Evaluation Methodology

Bids were evaluated in accordance with the published evaluation criteria. Weightings and scores are contained within the Confidential Appendix B

2.2. Quality

The quality questions were scored and evaluated in accordance with the published criteria.

The quality element of the responses were evaluated by a panel of officers and moderated by staff from the Procurement Team at Somerset Council (see Confidential Appendix B for the list of evaluators and moderators). Each evaluation panel member scored each Bid on an individual basis and prior to the moderation meeting.

Moderated scores are available in Confidential Appendix B, including the recommended award decision.

2.3. Pricing

Pricing was assessed based on the total price, further details are available in Confidential Appendix B, including the proposed award decision.

3. Contractual Position

The process has identified a preferred supplier, which we intend to award via the

Somerset Council Software Reseller Framework. Once the reseller is selected, the contract will be against the standard framework terms and conditions.

There is a clause within the Contract which allows termination by giving notice in writing to the supplier with 90 days notice.

For any extension to the Contract, discussions with the Supplier will be conducted 3 months in advance of the Contract expiry date to arrive at an agreed position.

This is subject to approval of a Non-Key Decision to award supported by this evaluation report.

3.1. Proposed Term

The awarded Contract will be for an initial term of 5 years. A 24 month contract extension option is available.

3.2. Service Levels and Contract Management

Service levels will be monitored as part of Contract Management and the contract will be managed to ensure that the service meets expectations and to identify further opportunities for cost and service improvement.

4. Next Steps

- Supplier to be informed they are the preferred supplier.
- Contact the Software Framework Resellers to start that Call-Off quotation process
- Finalise clarifications and demonstrations with the preferred supplier
- Award contract to the selected reseller.

End of Report