



Selecting best value

A guide for organisations awarding contracts for cleaning services



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1. Introduction

In recent years the trend towards the contracting out of cleaning services on the part of private sector organisations and public authorities has increased significantly in the majority of EU countries, as data collected by European Federation of Cleaning Industries (EFCI) shows. It is estimated by EFCI that in 1997, public authorities in six European countries (Belgium, France, Portugal, Spain, the Netherlands and the United Kingdom) alone contracted out the equivalent of 5.8 billion EUR of industrial cleaning services. Across the whole of the European Union, and when contracts awarded by private sector organisations are included, this figure is significantly higher.

Competitive tendering of industrial cleaning services over a contract value of 200 000 EUR is a requirement under the EU Services Directive 92/50/EEC¹. This Directive has been implemented in different ways in all Member States. In addition, many private sector organisations are also contracting out services previously provided in house (including cleaning, security, catering and maintenance) in order to achieve greater efficiency and flexibility.

Private industrial cleaning contractors have therefore become responsible for ensuring high standards of cleanliness and hygiene in many public and private buildings which receive daily use either by public or private sector clients, where an inferior standard of service would reflect negatively on the public perception of the organisation concerned. In sites such as schools or hospitals for example, cleanliness and hygiene considerations are also of particular importance to ensure public health. Cleaning provision by private contractors can also take place in areas where sensitive information or dangerous equipment is stored, thus placing particular demands on the skills and integrity of cleaning personnel.

As private companies and public authorities at European, national, regional and local level are finding themselves in a position of having to contract for the external provision of cleaning services, their “buying power” is becoming more and more important in determining the rules and quality of the cleaning services provided. Data provided by EFCI in 1997 shows that the market share of public tendering in the industrial cleaning sector has risen significantly in many Member States in recent years. In the countries where data was collected, public procurement constituted an average of 33% of total turnover in the sector.

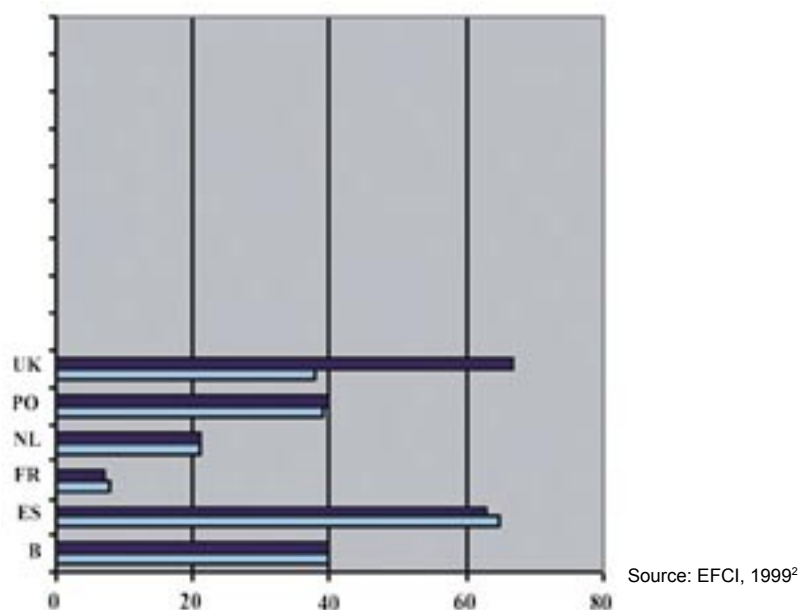
For these reasons the social partners EFCI and Uni-Europa elaborated this guide in collaboration with the competent services of the European Commission.

It goes without saying that the contracting authorities have to comply with the rules and procedures foreseen by the public procurement directives and with the general rules and principles of the EU Treaty applicable.

The responsibility for the contents rests solely with the social partners.

¹ This Directive, along with the other two procurement directives (93/36/EEC on the award of public supply contracts and 93/37/EEC) is currently subject to a Commission proposal for amendments {COM(2000) 275}.

Table 1: Market share of public tendering for industrial cleaning services (EU, 1997 and 1999)



Despite the increasing importance of public tendering and of high quality standards in the provision of cleaning services, a survey carried out on behalf of EFCI and UNI-Europa in 1999 showed that in the vast majority of countries cleaning contracts are awarded on the basis of the lowest price tender³. This is partly the result of declining public budgets, but can also be attributed to a lack of available guidance, which could assist contracting organisations in selecting a “best value” provider.

The concept of “best value” seeks to take into account not only a favourable price, but weighs this up with the quality elements of a bid for service provision.

1.1 Aims and Objectives of the Guide

This guide was written for those contracting organisations who are keen to ensure that they are selecting a provider to carry out cleaning functions who can combine quality with a favourable price rather than settling for the lowest price bidder. This guide aims to provide contracting organisations with a user friendly tool designed to assist them in defining their needs for cleaning services more clearly in relation to different sites and cleaning tasks. A detailed specification of their own requirements will subsequently allow them to select a contractor, which not only offers a competitive price, but also demonstrates the skills and capabilities to provide a high quality, reliable service. Finally, and most significantly, this guide also contains an easy to use framework for scoring bids, capable of being adapted to the requirements of each tendering organisation and cleaning contract.

² The figure for France is likely to be an underestimate of the actual situation as many contracts which are tendered in this manner are not counted as public contracts in the statistics.

³ A report for EFCI and Euro-FIET on a survey to investigate key issues within the European cleaning industries, Pye Tait, 1999

The aim of this framework is to provide contracting organisations with maximum autonomy in defining the quality criteria, which are of particular relevance to them, and to the cleaning service to be performed. It allows them not only to apply different weightings to quality criteria according to their own estimation, but also enables them to define their preferred balance between the technical merit and price elements when scoring bids.

Even in organisations which already benefit from the use of tendering guidelines this tool can be helpful as it will allow them to check their systems against the method proposed in this guide, thus enabling them to make a judgement of the quality and objectivity of their present system. This will either underline their satisfaction with existing mechanisms or enable them to make amendments, taking into account the proposals in this method, which has been developed and approved jointly by industry representatives and trade unions at the European level.

1.2 How to use this Guide

The main part of this guide is designed as an initial information or training tool for contracting officers, outlining the technical merit and quality criteria which will help them to identify providers offering a high standard of service. ***It acts as a guide to the rationale behind the quality criteria to be assessed, as well as an explanation of the use of the scoring framework contained in the Annex.*** It can subsequently act as a reference tool.

The scoring framework and tables contained in Annex 1 can be copied and used again and again. These can be adapted to the precise requirements of the contracting organisation.

The remainder of this guide is structured as follows:

Section 2 explains the importance of selecting quality as well as price when contracting for the provision of cleaning services. It provides information on the *negative implications, which can result from the award of contracts solely on the basis of price*, as well as highlighting existing good practice in relation to selecting “best value”.

Section 3 briefly outlines the context of European legislation in tendering industrial cleaning services.

Information on how best value can be defined in relation to the provision of cleaning services is included in **Section 4** of this manual. This section describes quality criteria in relation to the four key elements, which contribute to the successful performance of a contract as follows. These are the skills and capabilities of cleaning personnel, the skills and operational experience of the management staff, the quality of the contract infrastructure and the track record and service philosophy of the cleaning company.

Section 5 explains the “best value” scoring framework and provides some sample calculations.

2. Selecting Best Value - why it matters to you

As outlined in the introduction, private companies as well as public authorities are increasingly responsible for finding external contractors for the provision of cleaning services. This essentially implies a delegation of many former in-house or public service functions to private contractors. As a consequence, this delegation involves work in many areas where poor standards of cleanliness and hygiene cast a negative image on the organisation, or, in the case of a school or hospital can be a danger to public health.

The increasing market share of competitive tendering means that the standards set by contracting organisations in terms of the price paid for cleaning services have a significant impact on employment, salaries, working conditions in the sector and company infrastructure. As a result of all this, they have an impact on the quality of the service provided. A report by EFCI argues that a decrease in prices quickly translates into heavy pressure on employment, as labour costs in this sector amount to more than 75% of the turnover. Lower prices also lead to deterioration in quality as staff and contract infrastructure is slowly reduced to make cost savings. EFCI found evidence of the proliferation of pseudo companies, which do not respect their obligations in relation to collective agreements and social security legislation. Such companies often offer prices, which do not even cover labour costs, thereby pushing law-abiding companies out of the market. This often leads to further price contraction and – as quality standards decline – this serves to lower the image of the sector in the public eye.

The increasing proliferation of bad practice resulting from lowest price competition has, in a number of countries and at European level already led to initiatives aimed at making contracting organisations aware of the consequences of the systematic application of the criterion of the lowest tender.

In France, for example, the French federation of cleaning industries (FEP) has elaborated a charter on “Best Value for Money” (*Charte du Mieux Disant: “privilégier la qualité, c’est bien calculé”*).

The charter argues that selecting best value makes good business sense for authorities issuing tenders for cleaning services, industrial cleaning firms and users (i.e. the public) as it ensures higher quality standards. It proposes a three stage tendering process.

At the first stage, contracting authorities clearly define their own requirements (in relation to the surface area and types to be cleaned; the frequency of service; the nature of materials to be used; the level of quality to be attained). The importance of allowing sufficient time for site visits and the preparation of tenders is underlined.

At the second stage weightings are attributed to the importance of different contract award criteria to set out the priorities of the contracting organisation. In doing so, it should be borne in mind that price need not always be the first consideration, but attention should be paid to technical merit (including human resources; technical infrastructure; proposed work plan and organisation; internal quality control mechanisms; method for achieving the desired quality standard).

At the third stage a detailed evaluation of offers received is carried out and abnormally low tenders are detected. In case of abnormally low tenders it is recommended that contracting authorities request written clarification on such tenders. This clarification has to be referred on issues such as the means to be used to carry out the work and their merit (number of staff to be employed on site and their hours; systems of training; technical specifications of materials to be used etc.). Should replies to requests for further information prove inadequate to show an ability to provide the technical and quality standard required, it is suggested that such offers should be eliminated.

Public and private sector clients are therefore becoming increasingly aware of the business case for selecting best value rather than the cheapest price and are awarding contracts to the “economically most advantageous tender” - an option provided for in European public tendering legislation.

3. Public tendering for industrial cleaning services and European legislation

3.1 Introduction

The European Union has developed an extensive legislative framework to cover public procurement. The tendering of a variety of goods and services accounts for 720 billion EUR of public expenditure and is responsible for generating a significant number of jobs.

The tendering of industrial cleaning services falls under the remit of the European Services Directive (Council Directive 92/50/EEC). This Directive, along with the other two procurement directives is currently subject to a proposal of the European Commission with respect to article 251 of the European Treaty. In this proposal the Commission has put those three Directives together in one with a final proposal in 2001 and forwarded it to the European Parliament. Regarding the legal procedure set down in article 251 the Parliament adopted on the 17th of January 2002 its report by introducing a number of amendments. The future will show the final outcome of this project.

For the purposes of this section, this guide will concentrate on the mechanics of the contract award process, as it currently pertains to industrial cleaning contracts.

The decision to issue a public tender

Any organisation requiring cleaning services first of all has to reach a decision on whether it would be more beneficial for them to carry out these services internally or whether to seek an external contractor. Once the decision has been taken to contract out cleaning services, three basic methods of tendering are available:

- Open procedure
- Restricted procedure
- Negotiated procedure (this procedure is only applied in exceptional and limited cases foreseen by the Directive)

Which procedure is to be used depends to a certain extent on the value of the contract to be let and the specifics of the service to be provided. Generally, the contracting authorities are free to choose between the open and restricted procedure. Regardless of the tendering procedure selected it is important to set aside sufficient time to thoroughly plan the tender specifications and methodology of selection, as careful planning at this stage will repay manifold in relation to the quality of the tenders being received in the award process. In particular, it can be useful to conduct surveys of the work and quality currently being delivered in order to be able to draw comparisons in future (bearing in mind that this can only be done if the cleaning specification itself does not change).

3.2 Exclusion and selection of tenderers

All public contract award processes essentially go through three stages (see also Table 3):

Exclusion criteria

At the first stage, **exclusion criteria** define the type of companies, which have to or can be excluded from the tender. Article 29 of the Directive provides an exhaustive list of these exclusion criteria. To summarise briefly, it is stated that a service provider can be excluded:

- if it is bankrupt or in liquidation;
- if it is subject of proceedings for a declaration of bankruptcy;
- if it has been convicted of any offence concerning professional conduct⁴;
- if it has been guilty of grave professional misconduct;
- if it has not fulfilled obligations relating to the payment of social security contributions;
- if it has not fulfilled obligations in relation to the payment of taxes;
- if it is guilty of serious misrepresentation in supplying or failing to supply information regarding criteria for qualitative selection;
- if it is not entered in the professional register as required by national legislation.

Selection criteria

At the second stage, **selection criteria** define the type of company, which will be invited to tender for the work. A number of companies can be excluded at this stage, for example on the grounds of financial, economic or technical capacity. Companies hoping to be invited to submit a full tender must provide insight into their organisation with respect to their organisational structure and capacity, knowledge and skills of the personnel involved in planning and carrying out cleaning services, the service record of the organisation, the availability of the necessary infrastructure to meet the client's requirements, the average relevant turnover of the company over the last 3 years and the availability of quality measurement systems if relevant to the execution of the contract.

The Directive provides an exhaustive list of the documents, which may be required to prove *financial and economic capacity*. Article 32 of the Directive sets out the different means of proof that may be required from a contracting organisation in order to show its *technical capacity*. These means of proof include:

- evidence of the service provider's educational and professional qualifications and/or those of its managerial/operational staff;
- a list of principal services provided in the last three years;
- a statement of the average number of staff over the last three years;
- a statement of plant or technical equipment available to assist in carrying out the contract;
- a description of quality control systems;
- an indication of how much of the service the provider intends to sub-contract.

⁴This can include proven legal proceedings with regard to the non-respect of collective agreements, minimum wage or employment protection legislation.

National regulations for public tendering permitting the information provided by the interested parties at the selection stage can consist of so-called company declarations. This means that so far as the selection or exclusion criteria and financial and economic capacities are concerned, proof does not have to be provided until a later stage in the tendering process (but before the final award of the contract). Via a company declaration, the applicant company indicates that it is able to produce the requested proof if required to do so. Such a system can be beneficial to both parties by reducing the amount of paperwork to be transmitted at selection stage, but must be backed up by sufficient sanctions should a company subsequently be unable to provide the required proof.

This guide gives, already at this stage, the possibility of a scoring system which allows the national authorities to select the applicants who will have the general capacities for the tender (especially with regard to delivering of a quality service).

3.3 Criteria for the award of tenders

Having chosen the companies to go forward to full tender at selection stage, in the final, third stage, **award criteria** assess the merit of the individual tenderers on the basis of how well they meet the tender specifications⁵.

3.3.1 Description and assessment of the work: Activity or quality based cleaning systems

It is important to establish at this stage, whether the client is keen to receive tenders on the basis of an activity-based or a quality-based cleaning system. This may influence the information to be provided by potential contractors in terms of how work is planned and how quality is assessed.

Activity based cleaning systems

An activity-based cleaning system is characterised by mainly or exclusively stating what cleaning operations must be carried out, on what surfaces and how often. Such systems do not provide the opportunity of establishing actual result descriptions/quality goals on the individual surface or room to be cleaned, rather, it is expected that each cleaning operation is carried out with the most professionalism and skills possible. One example of an activity-based cleaning system is Programmed Cleaning. Under such a system, each individual room is assigned a cleaning programme, usually expressed in a three-digit-number code. This code expresses the frequencies with which a room needs to be cleaned per week, how often the floor and inventory needs to be cleaned thoroughly and how many times superficial cleaning of the floor and inventory needs to be carried out. A list needs to be available defining the terms “thorough” and “superficial” cleaning. A similar logic is applied in frequency-based cleaning systems which, instead of assigning frequencies to activities in a room, attach frequencies to certain work operations and objects and surfaces in an individual room or grouping of rooms.

⁵ Even if there is effectively only one assessment stage (such as in an open procedure), a logical distinction has to be made between the three different types of criteria.

Quality-based cleaning systems

Quality-based cleaning systems are characterised by mainly or exclusively stating the level of quality to be delivered. It is therefore not the contracting organisation but the supplier who determines how this quality is to be brought about. These systems therefore generally do not have a statement of either methods or frequencies, but competition is based on the best result/outcome.

In a quality based cleaning system, it is therefore acceptable not to clean a surface that is already clean if the established quality is maintained in a regularly used room. In recent years the industry has increasingly worked on ways of describing quality/result requirements. Such standards include visual quality goals and evaluations, but can also involve the measurement (with specifically designed tools) of levels of dust, hygiene, friction, shine, static electricity and conductance.

Depending on the cleaning specification to be performed, it may prove valuable to combine a frequency-based system (for example for work operations for “sensitive surfaces”) with a quality based cleaning system.

It is strongly recommended that the contracting authorities choose to award the service on the most economically advantageous tender. By doing so, the following tender specifications shall be specified in the contract documents or in the tender notice in order to receive the best value:

- Contractual conditions relating to the period covered by the agreement with term of notice, payment schedule and annual review, as well as code of conduct for work carried out by third parties;
- The cleaning programme with the activities and frequencies of the cleaning work per room category;
- Floor plans of the premises to be cleaned;
- Room list indicating which cleaning programme is to be employed where;
- Times of day when work can be carried out;
- Times of day when cleaning cannot take place, or number of days that work can be done;
- The quality evaluation system for cleaning work, or the way in which the quality is defined and guaranteed, and the consequences if cleaning quality is inadequate;
- If required, specifications of sanitary supplies and other products to be provided, services and standby prices;
- Date of award and work commencement date.

Applicants will also be invited to inspect the site during which a detailed explanation of the cleaning specification will be given and made available to all potential contractors.

It is important at this stage that the description of the services to be provided is as precise as possible. By doing so it may emerge that there are certain jobs which are difficult to define or assess in advance. It is possible for such services to be listed under “extra or periodic cleaning” to allow them to be contracted (at a previously agreed price) from time to time.

When the description of services is set, in principle no changes can be made anymore. Nevertheless, if changes are made exceptionally, it is important that the tenderers understand whether changes are being made in the scope of the work in relation to the work done previously. It should be obvious to everyone to ensure that changes in standards due to this change in specification are not attributed to the private contractor.

3.3.2 Final selection of the company

Once all tenders have been received based on this cleaning specification, the tenders are compared. The selection of the successful company is then made on the basis of award criteria set out in the tender specification.

According to the European Services Directive, criteria for the award of contracts can be the following:

Table 2 : European Services Directive

“Without prejudice to national laws, regulations or administrative provisions on the remuneration of certain services, the criteria on which the contracting authority shall base the award of contracts may be:

*(a) where the award is made to the economically most advantageous tender, various criteria relating to the contract: for example, **quality, technical merit, aesthetic and functional characteristics, technical assistance and after-sales service, delivery date, delivery period or period of completion, price; or***

(b) the lowest price only.

Where the contract is to be awarded to the economically most advantageous tender, the contracting authority shall state in the contract documents or the tender notice the award criteria which it intends to apply, where possible in descending order of importance”.

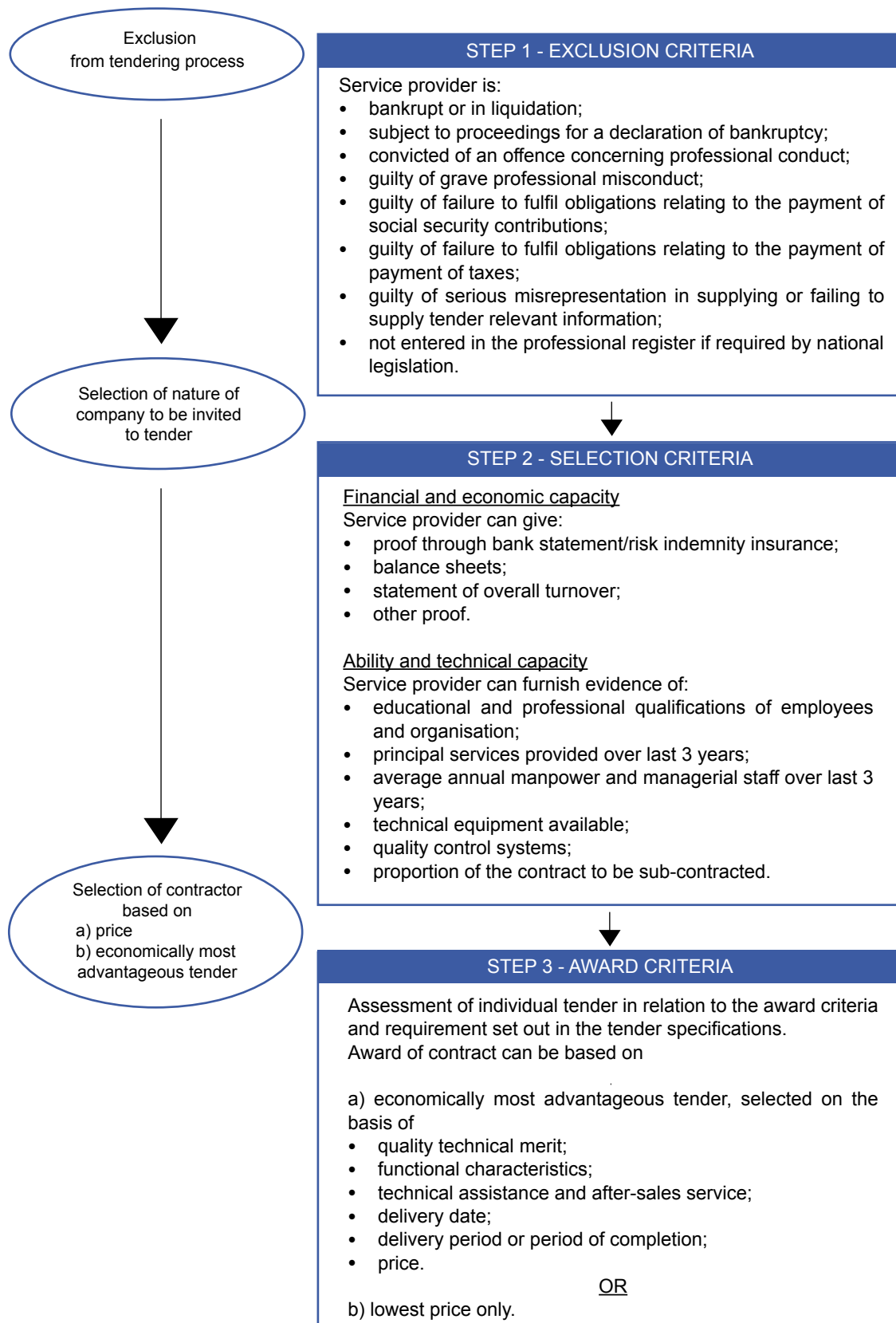
The provisions of the Services Directive do not limit contracting organisations’ freedom to decide whether they wish to award a contract to the lowest price provider or to the economically most advantageous tender.

However, as highlighted in Section 2 of this guide, it is considered that in order to avoid the disadvantages of competition driven solely by the criterion of the lowest price, the award of contracts on the basis of the economically most advantageous tender is to be preferred. In order to encourage the submission of high quality bids, which closely match the requirements of the contracting organisation and to prevent challenges of the contract award process by unsuccessful tenderers, it is important that clear selection and award criteria are set down in the tender specifications.

Section 4 of this guide sets out the quality selection and award criteria considered crucial in seeking to select the economically most advantageous, or best value provider.

Furthermore, Section 5 elaborates a scoring system, which allows contracting organisations to objectively evaluate tenders submitted within the frame of this best value awarding system and provides complementary information on the practicalities of tendering and awarding contracts under such a system.

Table 3 : Three-stage model of contract award process



4. Defining best value in the industrial cleaning services

4.1 Introduction

As is the case with most organisations seeking to provide a service, the quality of the service rendered depends on a number of key factors. Of all these factors, the capabilities, skills and motivations of front line staff is clearly the most important, as they are responsible for the day-to-day performance of the work. In addition, the operational planning and management of front line staff and services needs to ensure that the service is performed to the highest possible quality standard. Of similar importance is the technical/product, operational and human resource infrastructure available to front line staff and the contract management team. Finally, it is crucial that all operations are backed up by a company infrastructure that not only has the relevant track record to perform a quality service, but also displays a quality of service philosophy, which meets with the requirements of its client.

The three key areas in which the quality and the technical merit of a proposal for the supply of cleaning services should therefore be assessed are as follows:

- cleaning personnel;
- contract management/operations;
- contract infrastructure.

The key areas will appear either in the selection stage or in the award phase.

It should be emphasised that contracting organisations seeking to apply any (or all) of the quality criteria set out below, need to highlight the general selection and award criteria in their contract documents or tender notices. A sample of an open tender notice can be found in Section 5 of this guide.

4.2 Cleaning personnel

Experience

The most important asset of any cleaning company is its cleaning personnel. It is with their diligence, motivation, skills and experience that the daily performance of the service stands and falls. Depending on the nature and location of the work to be performed, it is therefore crucial that a bidding company can provide assurance that the personnel selected to perform the work have the necessary experience and capabilities to provide a high standard of service. In the case of highly specialised locations (such as hospitals), the contracting organisation may look for proof that the assigned staff has experience of working in this or a similar environment and that the staff has received relevant and (where available) accredited training. In other cases, it may be sufficient to receive information on the length of time, for which staff has been employed in the industry. This information can be obtained through staff CV's and individual training records.

It is clear that in a significant number of locations, cleaning personnel are recruited from amongst the staff already employed at the site. Nevertheless it is crucial that a bidding company is able to provide evidence of their capacity to recruit suitable staff and basic and ongoing training should staff turnover occur, or requirements for personnel increase as a result of changes in operational parameters. Information about levels of staff turnover (beyond that which naturally occurs through changes in the business environment) and absenteeism can provide an indication of company stability and the quality of the working environment.

Skills and capabilities of cleaning personnel

Evidence of any basic or additional training received by staff can provide assurance that individuals assigned to the contract have the key skills and capabilities required of a cleaner. Contracting organisations should elaborate in their tender notices any additional, technical or activity specific training, which they require of staff who are to be assigned to any specialised environments. Bidders can be asked to provide evidence of when and where such training was received, or will be given, prior to the inception of the contract. Information provided by the bidder on the existence and quality of any training facilities can provide assurance that staff skills and qualifications are regularly updated. It is generally recognised that the cleaning personnel receiving continuous training are more likely to show greater motivation and commitment to the industry. The availability of employer funded training should be tied in with a transparent career structure enabling vertical and horizontal promotion. This equally ensures higher levels of motivation and ultimately a better quality service. Where nationally accredited training for cleaning operatives is available, it is important that any training provided is certified in this manner.

Career opportunities

There is recognition that the availability of career opportunities contributes to higher retention rates of skilled staff.

Selection, recruitment and vetting

Even where a contract requires that existing staff on site be taken over, it is important that companies can provide details of a structured staff selection and recruitment procedure. A dedicated and suitably trained personnel team on the basis of an established human resource policy, which incorporates the principles of equality of opportunity and shows a commitment of effective human resource management, should ideally implement procedures. This can provide peace of mind that all staff provided by the contractor meets the standards that the contracting organisations themselves would wish to apply. Suitable checks on employment track records can provide some assurance of the reliability, efficiency and effectiveness of potential staff. For particularly sensitive sites, systematic vetting may be required.

Contracting organisations may wish to seek evidence that a potential contractor's recruitment literature encourages equality of opportunity and avoids racial bias, and is therefore in line with their own equal opportunities policies. Insistence on the observance of such principles can send a strong signal to potential contractors and therefore raise the profile and potential for success of equality policies. A number of countries have guidelines or codes for ethical recruitment. Where these exist, they should be applied.

Employment conditions and health and safety of workers on site

It is widely recognised that the existence of a fair and transparent reward structure has a positive impact on the retention of experienced staff, their motivation and job satisfaction, and therefore the quality of their performance. Evidence of such systems include respect for any collective agreements which may be in place; a company trade union policy; the existence of additional performance related reward structures and staff grading and assessment systems. A framework should be in place for the regular review of salaries and training requirements. Evidence of the existence and of effective channels of staff-employer communications, through a works council - where the establishment of such a body is required by legislation – or through another structure enabling dialogue, can also provide additional assurance of a higher quality working environment.

In order to avoid awarding contracts to disreputable companies, contracting organisations should seek evidence that working conditions applied to the company's cleaning staff are in compliance with national legislation and/or collective agreements. Where no collective agreements are in place, rostering schedules should provide information on working hours and length of shifts. This is important as excessively long working hours can lead to accidents and affect performance.

Good quality providers should also be able to give information about the health and safety policies and procedures, which apply to workers on site. These should conform to European framework regulations and national legislation. A good health and safety track record indicates a company, which rates its personnel as its highest asset. Such companies are likely to offer a higher quality-working environment and should therefore have lower rates of absenteeism and more motivated staff.

Well regulated working conditions and the availability of employee information and consultation systems lower the potential for disputes and reduce risks relating to the health and safety of staff, clients and their property as well as the general public.

Table 4 : Quality criteria relating to cleaning personnel

CLEANING PERSONNEL	
Experience	<input type="checkbox"/> Experience in the industry <input type="checkbox"/> Activity specific experience <input type="checkbox"/> Staff turnover and absenteeism
Skills and capabilities	<input type="checkbox"/> Basic training <input type="checkbox"/> Additional training and qualifications <input type="checkbox"/> Activity specific training <input type="checkbox"/> Recurring training <input type="checkbox"/> Other skills <input type="checkbox"/> Career opportunities
Selection and recruitment	<input type="checkbox"/> Recruitment and selection methodology
Employment conditions and health and safety	<input type="checkbox"/> Salary and benefit levels <input type="checkbox"/> Staff employer relations <input type="checkbox"/> Working conditions <ul style="list-style-type: none"> ● Health and safety provisions respected and conform with EU and national legislation
Other criteria to be defined by the customer	<ul style="list-style-type: none"> ● A justification of these criteria must be provided; they must remain within the framework of relevant European and national legislation

4.3 Contract management / operations

The management team / the contract manager

When contracting out cleaning functions, contracting organisations are generally keen to ensure that a minimum supervisory effort will be required on their part in ensuring the contractual performance of the work. The competence and organisation of the external contract management team is therefore highly significant. The client must feel satisfied that all members of the external management team have the necessary skills to meet the client's requirements. Channels of responsibility must be clearly laid out and rapid response times and adequate back-up capacity must be demonstrable. The bid must therefore provide information about the skills and experience of each member of the management team and their responsibility within the framework of the contract. Standards should be set in relation to how quickly a client's queries are dealt with and who has ultimate responsibility. In relation to sites requiring more specialised cleaning skills or where a premium is being placed on the immediate smooth functioning of the service, evidence of contract specific experience may be required.

From the point of view of the client, the contract manager is the most important part in all matters relating to the performance of the contract. It is therefore crucial that the client is satisfied with the skills and capabilities of this individual. Bidders must therefore provide detailed information on the identity, skills and experience of the contract manager. In certain cases specific, in-depth contract specific knowledge may be required to avoid the need for a long warm-up period and the emergence of potential complaints or health and hygiene risks. In these cases, the contract manager should be able to demonstrate a perfect understanding of the client's requirements.

Availability and response time

The operational plan should ensure that the contract manager can be contacted quickly and that s/he has the capacity to make decisions effectively within a clear chain of responsibility and a prompt response time.

Operational planning

The operational plan presented in the bid must satisfy the client that the contractor has necessary knowledge of the requirements of a particular site to draw up a rostering methodology. This has to meet client requirements in terms of expected standards of service provision and can act as the basis of contractually agreed levels of provision.

The operational plan must also demonstrate that the contractor has sufficient organisationally capacity in terms of delivery, and, qualified and experienced manpower to ensure that equipment and members of staff can be replaced or supported at short notice.

The bidder should demonstrate that procedures are, or can be put in place, which can guarantee a quick and smooth start-up and operation of the contract. Assurance must be given that any procedures specifically agreed with the client will always be met and clients will always be consulted and informed in advance of any necessary modifications.

The information given in the operational plan must satisfy the client that the contract manager can monitor the performance of the contract on a regular basis and at specified times/dates. The proposal put forward by the bidder should therefore outline a comprehensive reporting structure, which ensures that:

- reporting is always done and is done within a set timeframe;
- reporting provides responses to relevant questions;
- reporting is objective;
- reporting is more than just an administrative task;
- reporting is client customised;
- reports are collated and analysed;
- reporting is referred to security requirements.

In order to ensure that a minimum of time input is required from the client, the operational proposal should set out how communication regarding contract, site and customer is to be managed and the frequency and organisation of meetings.

Support services

The provision of effective contract support services from the company's headquarters assists in ensuring the smooth running of the contract. The operational proposal should contain information about the support services made available by the company's headquarters (such as administration, invoicing and personnel).

Quality assurance

In order to ensure a stable and satisfactory contract it is important that both the contracting organisation and the contractor are clear about the quality standards to be achieved and how these are to be assured. Information on the contracting organisation's quality philosophy should be readily available and should be compliant with those things that the contracting organisation itself wishes to apply. Agreement on quality assurance should therefore be an important part of contractual negotiations and should involve the formulation of a well-defined system of quality assurance and inspection. It should be clearly set out by whom, how often and how different elements of quality control are to be carried out. Evidence of relevant quality certification should be provided⁶.

⁶ A European standard providing basic requirements and recommendations for quality measurement systems for cleaning performance (EN 13549) has been adopted in the European Committee for standardisation.

Quality can be assured by assessing objective and subjective quality (or preferably a mixture of both methods). The objective quality of the provision of services is generally measured with reference to established service activities and/or qualities. This allows quality assurance and monitoring procedures to be carried out, which can be compared to the contract, documented and reproduced. The objective quality of cleaning services is most often built on a set of evaluations that by virtue of precise and limited definitions gives a representative picture of conditions of cleanliness. For example, if quality goals are agreed upon in the form of maximum amounts of dust, hygiene norms, or non-skid safety coefficient etc., these can be measured objectively with the help of measuring tools designed for this purpose.

The subjective quality of the provision of services is an expression of the overall impression, measured for example through user surveys. These must be comparable to a previously established degree of user satisfaction.

If a contractual agreement has been reached on the delivery of a service according to an activity based cleaning system, estimation needs to be made based on trade knowledge on the nature and frequency of activities required attaining the desired standard of cleanliness. Quality assurance is then generally carried out on the basis of monitoring compliance with the agreed frequencies with which certain operations are to be carried out.

Quality assurance systems in quality based cleaning systems are based both on visual quality assessment and on objective measurements, as set out above.

All personnel involved must receive sufficient training to ensure that quality standards set down in the contract are understood and achievable. Staffs responsible for carrying out quality assurance must have received detailed and contract specific instructions.

Inspections

The frequency of internal and external inspections should be set out in the work specifications included in the contract. Internal inspections are generally carried out with the use of specially prepared charts, which should tie in with the requirements of the contract. Systems must be in place to rectify any downward deviation in quality standards as quickly as possible. In addition, a running evaluation must be carried out to assess whether purchases or investments need to be made to achieve an optimum of tools, machinery, cleaning products and so on to achieve the required quality standards.

Table 5 : Quality criteria relating to contract management and operations

CONTRACT MANAGEMENT / OPERATIONS	
The management team / the contract manager	<input type="checkbox"/> Structure, organisation and skills of the contract manager and management team <input type="checkbox"/> Contract specific know-how of the contract manager and management team <input type="checkbox"/> Availability <input type="checkbox"/> Response time <ul style="list-style-type: none"> ● Promptness of intervention
Operational planning	<input type="checkbox"/> Operational planning methodology <input type="checkbox"/> Start-up of cleaning process <input type="checkbox"/> Terms of delivery <input type="checkbox"/> Back-up capacity <input type="checkbox"/> General and client-specific procedures <input type="checkbox"/> Reporting <ul style="list-style-type: none"> ● Communication related to site and customer ● Response to clients' special requirements
Support services	<input type="checkbox"/> HQ support services in <ul style="list-style-type: none"> ● administration ● invoicing ● personnel
Quality assurance / Inspections	<ul style="list-style-type: none"> ● Quality assurance ● Frequency of control ● Documentation of quality ● System of quality improvement ● Way and frequency the contractor evaluates the fulfilment of the contract
Other criteria to be defined by the customer	<ul style="list-style-type: none"> ● A justification of these criteria must be provided; they must remain within the framework of relevant European and national legislation

4.4 Contract infrastructure

The term “contract infrastructure” is used here to refer to any equipment and products to be used in pursuance of the contracts. Bidders must be able to show that any such tools are safe and suitable to the environment in which they are to be used. In relation to specialist tools or products it should be ensured that staffs have received adequate training in their application.

Equipment

All cleaning equipment to be used must be appropriate to the location and surface on which it is to be used. The safety of both the individual using it and the area where it is to be used needs to be ensured through providing adequate training on suitable and safe use and adequate maintenance.

Where specialist equipment is required, the technical proposal must stipulate whether the company has access to this equipment or whether it will be purchased specifically for the contract. Information should be included on how staff will be trained in its use.

The tenderers need to demonstrate that they can make available appropriate uniforms and safety equipment as required in the use of different cleaning equipment and products.

Products

The technical proposal should demonstrate that tenderers are aware of the requirement for different cleaning methods and products to treat different surfaces and that this material will be provided. The staff needs to be trained in the application of different products.

The use of products should follow appropriate environmental considerations and be carried out in consideration of the health, hygiene and safety of staff and the public.

Table 6 : Quality criteria relating to contract infrastructure

CONTRACT INFRASTRUCTURE	
Equipment	<ul style="list-style-type: none">● Maintenance and use of machines and materials● Cleaning adapted to the characteristics of the building● Uniforms and safety equipment
Products	<ul style="list-style-type: none">● Methods and products used● Environmental, health and hygiene considerations

5. Evaluation guidelines

As set out in Section 3 of this manual, every tender award should follow a three-stage process, in which tenders are assessed according to specified exclusion, selection and award criteria. Table 8 sets out the three-stage contract award process using the quality criteria elaborated in Section 4 of this manual. Even where tendering procedures are carried out in one step, a logical distinction should be made between exclusion, selection and award criteria. Exclusion and selection criteria are merely designed to eliminate companies from the tendering process which:

- a) have not met their statutory requirements in relation to tax or social security payments and are not considered financially stable;
- b) do not meet the selection criteria in terms of their size or expertise and in relation to their capacity of providing a quality service.

The final detailed evaluation of the technical and operational proposals contained in the bid is subject to the relevant award criteria and an assessment of price proposals.

The “best value” evaluation framework proposed in this guide allows contracting organisations to apply their own priorities in relation to:

- The selection of companies able to provide a quality service (STEP 1) - a scoring framework is proposed to select the best companies in this stage;
- The importance of price over technical merit (STEP 2);
- The importance attached to different categories of technical merit criteria relating to the tasks to be performed (contract specification) (STEP 3);
- The relative importance of specific technical merit criteria under each category (STEP 4);
- As required under European legislation, contracting organisations should announce selection and award criteria to be applied in the tender notice, if they do not appear in the contract documents (STEP 5);
- An easy to apply scoring framework is then used to determine the “best value” provider (STEP 6).

STEP 1 - The importance of selecting companies able to provide a quality service

To determine the proposals, which represent the best value according to their capacity of providing a qualitative service, the following tables are used:

Selection CRITERIA:

Financial and economic capacity

Balance sheets and profit and loss statements for the past three financial years if their publication is compulsory under the legislation or practice in the country in which the applicant is registered

Technical capacity

The organisational structure and capacity of the company
The professional experience and relevant training of the persons proposed to carry out the work
A proven track record of the organisation, provision and support of services which are the subject of this contract
Availability of the necessary infrastructure to meet the requirements set out in the tender
Average annual manpower and managerial staff over the last three years

Cleaning personnel

Category	Establishment of priorities for the different categories of criteria
Cleaning personnel	A high number of points allocated to the "cleaning staff" category indicates that the skills and professional qualifications and qualities of the cleaning personnel to be used are a prime concern

At this stage, it is recommended that public authorities should:

1. either fix in advance a maximum number of tenderers who they wish to be selected and keep the best scored (restricted procedure)
2. or, in the case of an open procedure, determinate a minimum score to be reached (possibly in each of the three criteria set out in the previous page), in order to be selected.

Both possibilities should be clearly indicated in the tender.

The following scoring example should be adapted and specified according to the object of the contract and the needs of the public authority as far as not being discriminatory:

Out of 60 overall points for the selection criteria, 18 points have been respectively allocated to the categories “financial & economic capacity”, and “technical capacity”, and 24 points to the “cleaning personnel” category (the first two categories should be developed as well):

Specific quality criterion	Points	Indicates the following priorities
Experience in industry	3	It is essential that cleaners have experience in the industry to ensure a problem free start-up or take-over period
Activity specific experience	2	Some activity-specific experience is needed as the cleaning environment requires specialist skills
Staff turnover and absenteeism	1	Satisfactory information should be available on staff turnover and levels of absenteeism
Basic training	4	Cleaners must have received a basic standard of training to ensure quality of service is guaranteed
Additional training and qualifications	1	Additional training and certification would be beneficial
Activity specific training	2	Key personnel should have received activity-specific training to ensure awareness of the challenges posed by the cleaning environment
Recurring training	2	The contract requires the use of skills, which are constantly improving. Regular training must be given to ensure that skills are up-to-date
Recruitment and selection	2	Significant importance is attached to the selection of quality staff
Salary and benefit levels	2	There is a recognition that satisfactory salary and benefit levels contribute to the retention of skilled staff and increase motivation. In this regard objective measurement can be found either in the legislation, or collective agreements or in any other reference text in force in the place where the contract will be executed
Staff employer relations	2	There is recognition that good climate in the company improves the working environment and therefore employees' motivation and productivity. As indicator companies may be asked the number of working days lost the previous year due to strikes or other forms of labour conflict
Employment conditions	2	There is a recognition that satisfactory working conditions contribute to the retention of skilled staff and increase motivation. In this regard objective measurement can be found either in the legislation, or collective agreements or in any other reference text in force in the place where the contract will be executed
Health and safety	1	There is a recognition that an occupational, health and security plan lead to fewer accidents and lower levels of absenteeism
Other criteria	0	No other criteria are relevant

STEP 2 - The importance of price over technical merit and quality of the service

To determine the proposal, which represents the best value according to the technical and price criteria, the following formula is used to arrive at the overall proposal score:

Offers proposal score = Technical score + Price score

It is up to the contracting organisation to determine its own priorities in relation to the weight to be given to the technical score and the price score. Allocating a number of points out of 100 for example can create a balance of quality and price as follows:

Technical score	Price score	Prioritisation of technical merit and price
50	50	Quality and price are of equal importance
60	40	Quality is more important than price, but price is still an important factor
80	20	Quality is of overarching importance, price is a secondary consideration
40	60	Price is more important, but quality is still an important factor
20	80	Price is more important, quality is a secondary consideration

STEP 3 - Defining the importance of different categories of technical merit criteria relating to the tasks to be performed

This step allows contracting organisations to define which categories of criteria are most important to them in their technical evaluation, by allocating a differing proportion of the points allowed for the technical merit score in STEP 2:

Category	Prioritisation of categories of criteria
Contract management	A high number of points allocated to this “contract management” category indicates that the skills of the contract manager and contract management team are considered to be of prime importance
Contract infrastructure	A high number of points allocated to the “contract infrastructure” category indicates that the product and technical infrastructure to be used is highly significant

EXAMPLE A Within these examples it has to be stressed that the first category “cleaning personnel” belongs to Step 1 (selection phase), which describes the general capacity of the company to compete for the published tender.

60 points have been allocated to the technical score

Category	Points	Indicates following priorities
Cleaning personnel	30	The quality of cleaning personnel is considered to be the most important factor in contract performance
Contract management	20	Highly skilled contract management staff are considered to bring strong know-how and service guidance
Contract infrastructure	10	The quality of equipment and products used is also of relevance

EXAMPLE B

40 points have been allocated to the technical score

Category	Points	Indicates following priorities
Cleaning personnel	30	The quality of cleaning personnel is considered to be paramount
Contract management	8	Supervision is more important than consultation
Contract infrastructure	2	The contract has a relatively low requirement for the use of additional equipment

EXAMPLE C

80 points have been allocated to the technical score

Category	Points	Indicates following priorities
Cleaning personnel	40	The quality of cleaning personnel is considered to be paramount
Contract management	20	Contract needs innovative management and close contact between client and management team
Contract infrastructure	20	The use of up to date equipment and products is significant in the performance of the contract

EXAMPLE D

20 points have been allocated to the technical score

Category	Points	Indicates following priorities
Cleaning personnel	18	An easy service is needed, change is not a problem, price is the highest priority
Contract management	2	Contact with the management team is minimal
Contract infrastructure	0	The contract has no specific requirements for the use of additional equipment

STEP 4 - Prioritising technical merit award criteria

This step allows contracting authorities to prioritise the detailed award criteria, which it considered to be important allocating points out of the total assigned to the two award categories in STEP 3:

Out of 60 overall points for technical merit criteria, 15 points have been allocated to the “contract management” category :

Quality award criterion	Points	Indicates the following priorities
Contract specific know-how of the contract manager and the management team	2	Certain members of the management team should have contract specific experience to ensure awareness of the particular requirements of the cleaning environment
Availability	3	The contract manager should be easy to reach when required
Response time	2	A quick response time is of great importance
Operational planning	1	The management plan should show significant expertise of rostering. This proposal should be adequate to form the basis of the contract
Terms of delivery and back-up capacity	2	There must be evidence that the company has the terms of delivery and sufficient back-up capacity to meet the requirements of the contract should operational parameters change
General and client specific procedures	0	Not deemed relevant to the contract
Reporting, communication and response to special requirements	3	These three elements should be clearly established and meet the needs of the client
HQ support	0	Not deemed relevant to the contract
Quality assurance / frequency, documentation and evaluation	2	Quality standards should be clearly stated and should be monitored; inspections must be regular; the way the company evaluates the fulfilment of the contract has to be clear
Other criteria	0	Not deemed relevant to the contract

Out of 60 overall points for the technical merit criteria, 10 points have been allocated to the “contract infrastructure” category:

Quality award criterion	Points	Indicates the following priorities
Equipment maintenance and use	4	Equipment must be provided by the contractor; a high standard of use and maintenance has to be provided
Cleaning adapted to the building’s characteristics	1	Cleaning has to be provided without damaging the building or the inventory
Uniforms and safety equipment	2	Cleaning uniforms and safety equipment must be provided by the contractor and must be suitable for the personnel and applicable for surfaces to be treated
Products and methods used	1	Contractors must supply products and methods to meet required standards
Environmental, health and hygiene considerations	2	Products must meet prescribed environmental, health and hygiene standards
Other criteria	0	Not deemed relevant to the contract

STEP 5 - Announce chosen selection and award criteria in tender notice

As outlined in Section 3, contracting organisations seeking to award a contract to the “economically most advantageous tender” must state the selection and award criteria to be applied in their tender notices. Table 7 shows an example of a standard format for an open tender notice, as provided for by the Guidance Notes for the European Services Directive.

Table 7: Format for individual contract notices - Open procedure as set out in Annex IIB of the Services Directive

1. Name, addresses, telegraphic address, telephone, telex and fax numbers of the contracting authority
2. Category of service and description. CPC reference number
3. Place of delivery
4. a) Indication of whether the execution of their service is reserved by law, regulation or administrative provision to a particular profession
b) Reference to the law; regional or administrative provision
c) Indication of whether legal persons should indicate the names and professional qualifications of the staff to be responsible for the execution of the service
5. Indication of whether service providers can tender for a part of the services concerned
6. Where applicable, non-acceptance of variants
7. Time limits for completion of the service or duration of the service contract and, as far as possible time limit for starting the provision of the service
8. a) Name and address of the service from which the necessary documents may be requested
b) Where applicable, final dates for making such requests
c) Where applicable, the amount and terms of payment of any sum payable for such documents
9. a) Final date for receipt of tenders
b) Address to which they must be sent
c) Language or languages in which they must be drawn up
10. a) Persons authorised to be present at the opening of tenders
b) Date, time and place of the opening
11. Where applicable, any deposits and guarantees
12. Main terms concerning financing and payment and/or references to the relevant provisions
13. Where applicable, the legal form to be taken by the grouping of service providers winning the contract
14. Information concerning the service provider's own position, and information and formalities necessary for an appraisal of the minimum economic and technical standards required of him
15. Period during which the tenderers are bound to keep open their tender
16. ***Criteria for the selection and award of the contract and, if possible, their order of importance; criteria other than the lowest price shall be mentioned if they do not appear in the contract documents***
17. Other information
18. Date(s) of publication of the prior information notice in the Official Journal of the European Communities or reference to its non-publication
19. Date of the dispatch of the notice
20. Date of receipt of the notice by the Office for Official Publications of the European Communities

Source: Guidance Note for the Application of the Services Directive, CEC

Contracting authorities seeking to use the "best value framework to select and to award a contract to the economically most advantageous tender could, in their tender notice, make reference to this guide. Details should be provided of the following:

Exclusion criteria: (state criteria; see Table 8 for exclusion criteria)

Selection criteria: (state criteria; see Table 8 for selection criteria)

Award criteria: (state criteria; see Table 8 for award criteria)

Details of selection criteria:

Maximum points to be allocated to the

Quality of the cleaning personnel (summarise key quality selection criteria)

Financial and economic capacity (summarise key quality selection criteria)

Technical capacity (summarise key quality selection criteria)

Details of award criteria:

Maximum points to be allocated

Price (state number of points)

Technical merit (state number of points)

Technical merit will be assessed as follows:

State number of points

Contract management (summarise key quality award criteria)

Contract infrastructure (summarise key quality award criteria)

Table 8 : Contract Award Process

EXCLUSION CRITERIA
<p><i>Applicants must provide the following:</i></p> <ul style="list-style-type: none"> • Entry in the professional register if required by the legislation of the Member State in which the company is registered
<ul style="list-style-type: none"> • Certificate from social security authorities to the effect that the applicant is up to date with the payment of social security contributions
<ul style="list-style-type: none"> • Certificate from social security authorities to the effect that the applicant has met all his tax obligations in accordance with the legal provisions of the country in which he is registered
<ul style="list-style-type: none"> • Profit and loss accounts if publication is compulsory under the legislation or practice in the country in which the applicant is registered
<ul style="list-style-type: none"> • If relevant, certification that any technical equipment to be used in pursuance of the contract conforms with European standards and/or their national implementation



EXCLUSION CRITERIA
<p><i>Applicants must provide the following:</i></p>
<p>Financial and economic capacity</p> <ul style="list-style-type: none"> • Balance sheets and profit and loss statements for the past three financial years if their publication is compulsory under the legislation or practice in the country in which the applicant is registered • Total turnover and turnover relating to services similar to those covered by this call for tenders for the past three financial years
<p>Technical capacity is assessed on the basis of the following:</p> <ul style="list-style-type: none"> • The organisational structure and capacity of the company • The general skills of the manager/management team • A proven track record of the organisation, provision and support of services which are the subject of this contract over the last three years • Availability of the necessary infrastructure to meet the requirements set out in the tender • Average annual staff turnover over the last three years • Proof of quality control systems in relation to the company's security philosophy, HRM philosophy and practice and operational back-up
<p>Quality criteria related to cleaning personnel:</p> <ul style="list-style-type: none"> • Experience in the industry; activity specific experience; turnover and absenteeism • Basic skills; additional training and qualifications; activity specific training; recurring training; other relevant skills; career opportunities • Recruitment and selection methodology, vetting • Salary and benefit levels; staff employer relations; working conditions; health and safety measures; other criteria





AWARD CRITERIA

Award is on the basis of the economically most advantageous tender, assessment is based on the following:

- Price
- A detailed description of how the service will be organised, provided and supported in terms of quantity and quality of manpower, back-up capacity and the use of technology
- Compatibility with the objectives of the contract

The assessment breaks down into the following quality criteria:

Contract management / operations

- Structure, organisation, contract specific know-how of the contract manager/management team
- Skills and experience of operational and management staff to be assigned to the contract
- Availability; response time; promptness of intervention
- Rostering methodology; start-up of cleaning in the company; terms of delivery; back-up capacity; general and client specific procedures
- Reporting; communication related to site and customer; response to special requirements
- Head Quarter support
- Quality assurance; frequency of control; documentation of quality, system of quality improvement; way and frequency the company evaluates the fulfilment of the contract
- Other criteria

Contract infrastructure

- Maintenance and use of equipment and materials; cleaning adapted to the characteristics of the building; uniforms and safety equipment
- Products and methods used; environmental, health and hygiene considerations

STEP 6 - The scoring framework to determine the “best value” provider

In the generally applied open procedure the contracting organisation can carry out an evaluation of the prices quoted in the remaining bids after the elimination of the tenders who were disregarded because of their failure to meet the selection criteria. This evaluation is based on the number of points that have been allocated to the price, as stated in the tender award notice.

Price evaluation

The firm offering the lowest price is awarded the full number of points available for price. All higher price offers are assessed against the lowest price bidder. Points for price are deducted in relation to the percentage that the price offer is above that of the lowest bidder. In the example below, where a total of 40 points are available for the price score, a 10% increase in price leads to a deduction in points of 10% off 40 points and so on.

EXAMPLE

Company	Price	Points
A	100.000 EUR	40
B	110.000 EUR	36
C	120.000 EUR	32

Assessing technical merit

After the contracting organisation has defined its priorities in terms of technical merit by awarding points to categories and quality criteria as set out in STEPS 1, 2 and 3, it is crucial that an objective assessment is made of extent to which bids meet these requirements. In order to ensure this objectivity, the following scoring parameters are being used:

- not applicable
- bad
- medium
- good
- excellent

Table 9 below provides definitions for each of our scoring parameters. “Not applicable” is used in the scoring tables for criteria, which are not deemed relevant to the contract.

Clearly, a company that scores “excellent” in relation to one of the quality criteria should be awarded a higher proportion of the points available than a company that is merely deemed “medium”. Different weightings are therefore applied to the points awarded to each criterion.

These are as follows:

Parameter	Weighting
Bad	0%
Medium	50%
Good	80%
Excellent	100%

The company with the highest number of “excellent” scores for key criteria (those criteria allocated the highest number of points by the contracting organisation) will therefore obtain the highest score in the quality and technical merit evaluation.

The points from the technical merit evaluation are added to the points awarded in the price evaluation to establish the “best value” provider.

The examples below show how this system is used.

Table 9 : Definition of scoring criteria

Not applicable	This takes account of the fact that not every item is applicable to every client. The criterion is not applicable to the award of this tender and is therefore not scored. The assessment “not applicable” should not be used randomly, but needs to be justified in relation to the requirements of the tender
Bad	The information provided does not allow satisfying the quality level expected by client
Medium	The information provided does not allow a full assessment whether the item proposed meets with the requirements
Good	The information provided meets the requirement outlined in the tender notice and meets the tenderers expectations
Excellent	The information provided meets completely the requirements and expectations and demonstrates an exceptionally high quality service based on successful performance in operation

STEP 6.1 - Selection criteria

Out of overall 60 points for the selection criteria, 24 points have been allocated to the “cleaning personnel” category:

(Further details should be given respectively for “financial capacity” and “technical capacity”)

Specific quality criterion “Cleaning Personnel”	Points available	Not Applicable	Medium (50%)	Good (80%)	Excellent (100%)	Weighted points allocated
Experience in industry	4			X		3.2
Activity specific experience	2				X	2
Turnover and absenteeism	0	X				
Basic training	4				X	4
Additional training and qualifications	1		X			0.5
Activity specific training	2			X		1.6
Recurring training	2		X			1
Other skills	0	X				
Career opportunities	2		X			1
Recruitment and selection, vetting	2			X		1.4
Salary and benefit levels	1		X			0.5
Staff-employer relations	0	X				
Working conditions	1		X			0.5
Health and safety	3				X	3
Other criteria	0	X				
TOTAL	24					18.7

TOTAL SCORE FOR QUALITY OF CLEANING PERSONNEL: 18.7 POINTS OUT OF 24

STEP 6.2 - Award criteria

The client has decided to allocate the available 100 points as follows :

- Price 50 points
- Technical merit 50 points

Technical merit categories:

- Contract management 25
- Contract infrastructure 25

Specific quality criterion "Contact management"	Points available	Not Applicable	Medium (50%)	Good (80%)	Excellent (100%)	Weighted points allocated
Contract specific know-how of the contract manager and the management team	3				X	3
Availability	1			X		0.8
Response time	2			X		1.6
Operational planning	1			X		0.8
Terms of delivery and back-up capacity	2		X			1
General and client specific procedures	0	X				
Reporting, communication and response to special requirements	6		X			3
HQ support	0	X				
Quality assurance / frequency, documentation and evaluation	10		X			5
TOTAL	25					15.2

Specific quality criterion "Contract infrastructure"	Points available	Not Applicable	Medium (50%)	Good (80%)	Excellent (100%)	Weighted points allocated
Equipment maintenance and use	6				X	6
Cleaning adapted to the building's characteristics	3				X	3
Uniforms and safety equipment	5		X			2.5
Products/methods used	2				X	2
Environmental, health and hygiene considerations	7				X	7
Other criteria	2		X			1
TOTAL	25					21.5

TOTAL SCORE FOR TECHNICAL MERIT: 36,7 POINTS OUT OF 50

ANNEX: EVALUATION TABLES

ASSESSMENT SHEETS

Company

1 EXCLUSION CRITERIA

Applicants must provide the following	Not-applicable	Applicable	Remarks
Entry in the professional register if required by the legislation or practice of the Member State in which the company is registered			
Certificate from social security authorities to the effect that the applicant is up to date with the payment of social security contributions			
Certificate from social security authorities to the effect that the applicant has met all its tax obligations in accordance with the legal provisions of the country in which he is registered			
Respect of the profit and loss accounts if publication is compulsory under the legislation or practice in the country in which the applicant is registered			
If relevant, certification that any technical equipment to be used in pursuance of the contract conforms with European standards and/or their national implementation			

A not-applicable score in any of these five items leads to immediate disqualification from the tender process.

2 SELECTION CRITERIA

Financial and economic capacity

Applicants must provide the following	Not-applicable	Applicable	Remarks
Balance sheets and profit and loss statements for the past three financial years if their publication is compulsory under the legislation or practice in the country in which the applicant is registered			
Financial turnover realised for similar services			

Technical capacity

Applicants must provide information on the following	Not-applicable	Applicable	Remarks
The organisational structure and capacity of the company			
The professional experience and relevant training of the persons proposed to carry out the work			
A proven track record of the organisation, provision and support of services similar to this contract			
Availability of the necessary infrastructure to meet the requirements set out in the tender			
Average annual manpower and managerial staff over the last three years			

Cleaning personnel

	Points available	Not applicable	Bad 0%	Medium 50%	Good 80%	Excellent 100%	Weighted points allocated
1.1 Experience							
Experience in the industry							
Activity specific experience							
Staff turnover and absenteeism							
1.2 Skills and capabilities							
Basic training							
Additional training							
Activity specific training							
Recurring training							
Other skills							
Career opportunities							
1.3 Recruitment, selection and vetting							
1.4 Employment conditions							
Salary and benefit levels							
Staff-employer relations							
Working conditions / health and safety							
Other criteria							
TOTAL							

A “not-applicable” or “bad” score in any of the categories will lead to the exclusion of the tenderers from the further selection/awarding process. If the score of a company is “medium”, further information may be requested.

3 AWARD CRITERIA

The contract will be awarded to the organisation presenting the economically most advantageous tender, assessed on the following criteria:

- Price
- A detailed description of how the service is to be organised, provided and supported in terms of quantity and quality of manpower, back-up capacity and the use of technology
- Compatibility with the objectives of the contract

SUMMARY

Applicants must provide the following	Number of points available	Points awarded	Remarks
a) Contract management			
b) Contract infrastructure			

TOTAL TECHNICAL MERIT:
PRICE:
TOTAL POINTS:

a) Contract management / operations

	Points available	Not applicable	Bad 0%	Medium 50%	Good 80%	Excellent 100%	Weighted points allocated
2.1 The management team							
Contract specific know how of the contract manager and the management team							
Availability							
Response time							
2.2 Operational planning							
Terms of delivery							
Back-up capacity							
General and client-specific procedures							
Reporting, communication and response to special requirements							
2.3 Support services							
HQ support							
Quality assurance / frequency, documentation and evaluation							
Other criteria							
TOTAL							

b) Contract infrastructure

	Points available	Not applicable	Bad 0%	Medium 50%	Good 80%	Excellent 100%	Weighted points allocated
3.1 Equipment							
Equipment use and maintenance							
Cleaning adapted to the building's characteristics							
Uniforms and safety equipment							
3.2 Products and methods used							
Environmental, health and hygiene considerations							
Other criteria							
TOTAL							

CALCULATIONS

Total points for price:

Total points for technical merit:

TOTAL POINTS ACHIEVED: