

**PROCUREMENT GATEWAY 3 -
CONTRACT AWARD REPORT -
PART I**



**2022/23 Community Forest Winter
Tree Planting Programme**

**Procurement Reference No.
23698**

Table of Contents

1. INTRODUCTION	3
2. BACKGROUND	3
3. PROCUREMENT PROCESS	3
4. TENDER EVALUATION CRITERIA	3
5. SUMMARY OF EVALUATION	10
6. FINANCIAL IMPLICATIONS	10
7. RECOMMENDATIONS	10
8. APPROVAL	11

1. INTRODUCTION

This contract award report is in relation to the procurement for the supply of standard trees for the 2022/23 Community Forest Tree Planting Programme.

This contract will be executed under PS0027.v2 PCC Goods Terms & Conditions and will run for the full contract duration.

Contract Duration: Duration of the contract is for 7 months

2. BACKGROUND

The Plymouth and South Devon Community Forest (P&SDCF), was chosen to become England's 11th Community Forest after submitting an EOI to England's Community Forest and DEFRA in 2021.

The Community Forest partners have now been provided with the funding agreement which provides access to DEFRA's Trees for Climate funding programme for the next 4 years.

The Plymouth and South Devon Community Forest will stretch from the heart of the city to the edge of the moor. It will encompass 1,900 hectares of tree planting amongst a much wider landscape to form a mosaic of different forest habitats within the urban and rural areas. It is a long-term project with 30-40 year objectives with an ambition to deliver 500 hectares of new forest creation in the first 5 years.

The new planting will be on both public and private land with a landowner offer formed to provide the Community Forest to act as a grant awarding body under landowner agreements. Delivery against the ambition of 500 hectares of planting will see the project secure £8.830m from the Trees for Climate Fund for Yr. 21/22 and the next three financial years.

The Council intend to purchase an initial quantity of 322 trees for its Yr. 22/23 winter programme which is outlined in the Procurement Documentation, Appendix A – Tree Order Specification and Pricing Spreadsheet.

3. PROCUREMENT PROCESS

In line with the Council's Contract Standing Orders and based on the anticipated contract value, this requirement sat within the 'Over £25k – relevant Government Procurement (GPA) thresholds' and was therefore subject to the requirement for a competitive procurement exercise to be undertaken and seek three formal quotations (non-verbal) / tenders: Two from PL Postcodes where possible.

4. TENDER EVALUATION CRITERIA

The following information concerning the evaluation criteria and scoring methodology was included in the ITT instructions.

A suitability assessment (also known as the selection stage) and an award stage.

Suitability Assessment Evaluation Methodology

For Information Only Schedules

The following schedules were for information only and were not evaluated.

Schedule - Suitability Assessment

- SA Section 1: Tenderer Information

Pass/Fail Questions

The following Schedules and questions were evaluated on a pass or fail basis. In the event of the Tenderer being awarded a 'fail' on any of the below criteria, the remainder of the Tender would not be evaluated and the Tenderer would be eliminated from the process. The Tender would be disqualified if a Tenderer failed submit these completed Schedules and questions.

Wherever possible the Council permitted Tenderers to self-certify they met the minimum PASS/FAIL requirements without the need to attach evidence or supporting information. However where the Council regarded the review of certain evidence and supporting information, as critical to the success of the procurement this would be specifically requested.

The return document clearly indicated whether 'Self-certification' is acceptable or whether 'Evidence is required' for each question.

Where Tenderers were permitted to self-certify, evidence would be sought from the successful Tenderer at contract award stage. Please note the successful Tenderer must to be able to provide all evidence to the satisfaction of the Council at contract award stage within a reasonable period, if the successful Tenderer is unable to provide this information the Council reserves the right to award the contract to the next highest scoring Tenderer and so on.

Schedule - Suitability Assessment

- SA Section 2: Insurance
- SA Section 3: Economic and Financial Standing

Award Evaluation Criteria and Methodology

Tenderers satisfactorily meeting the Suitability Assessment evaluation had their Tender responses evaluated by the Council to determine the most economically advantageous Tender based on the non-price and price criteria that are linked to the subject matter of the contract.

This section assessed how the Tenderer proposed to deliver the requirements as detailed in the specification.

The Council intends to award any Contract based on the most economically advantageous offer.

The Council would not be bound to accept the lowest price of any Tender submitted.

All responses were assessed against the Evaluation Criteria set out below:

High-Level Award Criteria

The high-level award criteria for the project was as follows:

Exact Requirements (Excluding Fruit Trees)

Award Criteria		Proportion of Weighting		
		Tier 1	Tier 2	Tier 3
Price		40%		
Non-Price		60%		
	1. Availability		30%	
	<i>1.1 Species Match</i>			10%
	<i>1.2 Growing Format Match</i>			10%
	<i>1.3 Rooting Match</i>			5%

	<i>1.4 Size Match</i>			5%
	2. Delivery			25%
	3. Quality			5%
		100%	100%	100%

Exact Requirements (Fruit Trees Only)

Award Criteria		Proportion of Weighting		
		Tier 1	Tier 2	Tier 3
Price		40%		
Non-Price		60%		
	1. Availability		30%	
	<i>1.1 Species Match</i>			7.5%
	<i>1.2 Growing Format Match</i>			5%
	<i>1.3 Rooting Match</i>			5%
	<i>1.4 Root Stock</i>			7.5%
	<i>1.5 Size Match</i>			5%
	2. Delivery		25%	
	3. Quality		5%	
		100%	100%	100%

In the event no Tenders are received for the Exact Requirements (the Council's preference), or in the event the number of trees available for any of the Exact Requirements does not satisfy the Councils required quantities for any specific line then the following award criteria will be applied to Substitutes offered.

Substitutes (Excluding Fruit Trees)

The high level award criteria is as follows:

Award Criteria		Proportion of Weighting		
		Tier 1	Tier 2	Tier 3
Price		20%		
Non-Price		80%		
	1. Availability		50%	
	<i>1.1 Species Match (Crown habit and size of tree)</i>			20%
	<i>1.2 Growing Format Match</i>			10%

	<i>1.3 Rooting Match</i>			10%
	<i>1.4 Size Match</i>			10%
	2. Delivery			25%
	3. Quality			5%
		100%	100%	100%

Substitutes (Fruit Only)

The high level award criteria is as follows:

Award Criteria	Proportion of Weighting		
	Tier 1	Tier 2	Tier 3
Price		20%	
Non-Price	80%		
1. Availability		50%	
<i>1.1 Species Match (Crown habit and size of tree)</i>			20%
<i>1.2 Growing Format Match</i>			5%
<i>1.3 Rooting Match</i>			5%
<i>1.4 Root Stock</i>			15%
<i>1.5 Size Match</i>			5%
2. Delivery		25%	
3. Quality		5%	
	100%	100%	100%

A Tender may not have been accepted if it significantly failed to satisfy any specific criterion, even if it scored relatively well against all other criteria.

In the event that evaluating officers, acting reasonably, considered that a Tender is fundamentally unacceptable on any issue, then regardless of the Tender's other merits or its overall score, and regardless of the weighting scheme, that Tender may have been rejected.

Price

Applies to both Exact Requirements and Substitutes.

Evaluation made against comparison of pricing schedules on a line by line basis.

PRI Total Tender Sum

The Tenderer's Total Tender Sum will be evaluated using the scoring system below:

$$\left(\frac{\text{Lowest Total Tender Sum}}{\text{Tenderer's Total Tender Sum}} \right) \times \text{Weighting} = \text{Weighted score}$$

The Tenderer with the lowest price was awarded the full score available for each criteria stated, with the remaining Tenderers gaining pro-rata scores in relation to how much higher their prices were when compared to the lowest price.

Non-Price - Availability

Applied to both Exact Requirements and Substitutes.

Tenderers were asked to provide responses to the availability criteria contained within Schedule 2 of the ITT Return Document on a line by line basis, which was intended to indicate how they will meet specific requirements.

Each line item was identified as being evaluated on the following basis.

Species Match (Exact Requirements Only)

Criteria	Score
Yes = Species & Specific Variety match	5
No = No Match	0

Species Match (Substitutes Only)

Criteria	Score
Alternative Species matching Crown habit and size of tree at Maturity	3
Leaf Colour match only	2
Genus match only	1

Growing Format Match

Criteria	Score
Direct Match	5
Partial match	3
No Match	1

Rooting Match

Criteria	Score
Containerised	5
Root ball	3
Bare root	1

Size Match

Criteria	Score
8 – 12cm if clear/single stem / 2-2.5m if multi stem	5
12 – 14cm if clear/single stem / 1-1.5m if multi stem	4
14 – 16cm	3
16 – 18cm	2
Feather/Shrub/Half Standard	1

Exception Note: For the following species *Castanea sativa*, *Ilex aquifolium*, and *Quercus robur* Size Match evaluation was evaluated on the following basis.

Criteria	Score
1.75 – 2.5m clear / single stem	5
1.2 – 1.75m clear / single stem	4

Exception Note: For the following species, *Pinus sylvestris* Size Match evaluation was evaluated on the following basis.

Criteria	Score
1.2 – 1.75m clear / single stem	5
1.75 – 2.5m clear / single stem	4

Exception Note: For the following species *Sambucus nigra* (Black Lace) Size Match evaluation was evaluated on the following basis.

Criteria	Score
1.5 – 2.25m Multi stem	5
1.2 – 1.5m Multi stem	4

Root Stock (Fruit Trees only)

Criteria	Score
MM106	5
M9/M26/Quince C	4
M27	3

MMIII	2
M25	1

Non-Price – Delivery & Quality

Tenderers were asked to provide method statements within the ITT Return Document, which were intended to explain how they would meet specific requirements.

Each method statement was scored on a scale of 0 to 5 points, in accordance with the following scheme:

Response	Score	Definition
Excellent	5	Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement/outcomes and provides details of how the requirement/outcomes will be met in full.
Very good	4	Response is particularly relevant. The response is precisely detailed to demonstrate a very good understanding of the requirements and provides details on how these will be fulfilled.
Good	3	Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements/outcomes will be fulfilled.
Satisfactory	2	Response is relevant and acceptable. The response addresses a broad understanding of the requirements/outcomes but lacks details on how the requirement/outcomes will be fulfilled in certain areas.
Poor	1	Response is partially relevant and poor. The response addresses some elements of the requirements/outcomes but contains insufficient/limited detail and explanation to demonstrate how the requirements/outcomes will be fulfilled.
Unacceptable	0	No or inadequate response. Fails to demonstrate an ability to meet the requirement/deliver the required outcomes.

Tenderers had to achieve an average score of 2 or more for each scored item. Any scored criteria item receiving less than 2 would result in the Tender being rejected and Tenderer being disqualified from the process.

Tenderers scores for each method statement were multiplied by the relevant weighting to result in a 'weighted score' for that method statement. The weighted scores were then totalled, with the total expressed as an overall score out of 30.

Method Statement	Weighting
MS1 – Delivery	25.00%
MS1.1 – Tree Delivery	25.00%
MS2 – Quality	5.00%
MS2.1 – Quality of Tree Stock	5.00%

Total	30%
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Moderation

Moderation will be undertaken where there is a difference in evaluator scoring of more than 1 point. Moderation may also be undertaken where the Council deems it necessary. This is to ensure no errors have been made in the evaluation process. An example has been provided below:

E.g. Scores received of 3, 3 and 4= No moderation undertaken

Scores received of 2, 3 and 4= moderation undertaken

5. SUMMARY OF EVALUATION

The Invitation to Tender was published electronically via, The Supplying the South West Portal – the Council’s chosen procurement portal on 22nd September 2022 with a Tender submission date of 1200hrs, 30th September 2022.

The Tender opportunity was issued to 3 organisations of whom had a history of providing the requirement to local authorities. Unfortunately, there were no organisations identified within the PL postcode area that could provide the requirements. Of the 3 organisations invited to Tender, 2 submitted Tenders, and 1 not providing a Tender response.

The received Tender submissions, were evaluated in accordance with the overall evaluation strategy set out above, and were independently evaluated by Council Officers, all of whom had the appropriate skills and experience, in order to ensure transparency and robustness in the process.

In order to ensure fairness of the process the evaluation Non-Price, and Price were split, with Price information being held back from the Non-Price evaluators.

The resulting Non-Price, and Price scores are contained in the confidential paper.

6. FINANCIAL IMPLICATIONS

Financial provision has been made for this contract within the project budget. Details of the contractual pricing are contained in the confidential paper.


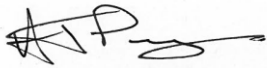
7. RECOMMENDATIONS

It is recommended that a contract be awarded to the highest scoring Tenderer, Barcham Trees Plc, for a total value of £39,426.00 for the supply of standard trees for the 2022/23 Community Forest Tree Planting Programme. Details of the successful Tenderer have been set out in the confidential paper.

This award will be provisional and subject to the receipt from Barcham Trees Plc of the satisfactory self-certification documents detailed in the suitability assessment questionnaire.

In the event Barcham Trees Plc cannot provide the necessary documentation, the Council reserves the right to award the contract to the second highest scoring Tenderer.

8. APPROVAL**Authorisation of Contract Award Report**

Author (Responsible Officer / Project Lead)			
Name:	Peter Hawking-Sach		
Job Title:	Natural Infrastructure Officer		
Additional Comments (Optional):			
Signature:		Date:	08/11/2022
Head of Service / Service Director			
[Signature provides authorisation to this award report and award of Contract]			
Name:	Anthony Payne		
Job Title:	Strategic Director – Place		
Additional Comments (Optional):			
Signature:		Date:	18.11.22