

1. PURPOSE

1.1 To detail the guidance on the evaluation of tenders.

2. METHOD

2.1 Evaluation Panels – protecting information and conflicts of interest.

2.1.1 A Tender Assessment Panel (TAP) has the responsibility of evaluating Pre Qualification Questionnaires and Tenders received. This Panel may be a group (made up of at least 3 members) of various project team members, the make up of this team will depend on the size and complexity of the project. The panel's role is to conduct the evaluation in accordance with any set evaluation criteria by examining the tenders for evidence of the Tenderer's ability to meet the requirements. Scoring should be on the basis of the evidence presented rather than mere speculation or suspicion or the personal knowledge of a panel member. The panel must be content that the Tenderer recommended accepts and agrees to perform in compliance with the technical specification and potential conditions of contract.

2.1.2 When handling pre qualification questionnaires and tenders, all staff must take account of the need to secure the best value for money, retain clear evidence of the decision making process, preserve strict equity between all Tenderers and observe the commercial confidentiality of tenders and other information supplied to Translink.

2.1.3 The period between receipt of tenders and announcement of a decision can extend over many months. During that time the confidentiality of the outcome of the competition must be preserved.

2.1.4 It is also important for all staff to maintain the highest levels of ethical behaviour. Persons involved in the tender evaluation must at all times act with impartiality, independence and integrity. Personal conflicts of interest in the tender process must be declared and that person should not form part of any Tender Evaluation. The tender evaluation process must be free from conflicts of interest and any perception of bias.

2.1.5 Translink are committed to protecting the integrity of the procurement process and protecting those involved in the tendering process including evaluation panels. Any connections between an evaluation panel member or a supplementary member and a Tenderer must be disclosed. Prior to the evaluation all panel members should complete a Declaration Form (TPF3051 Declaration of Interests Form) and return it to the Purchasing Department where it will be formally recorded to protect the members of the Panel.

2.1.6 Action Required

Complete the Declaration of Interests Form return it to the Purchasing Department as soon as possible. Should any potential conflict of interest arise during the tendering or evaluation process you must notify the Purchasing Department immediately. If you have no interests to declare, you must still return the signed Declaration of Interests Form and this will be treated as a "nil" return. The Declaration Form can be found in the Purchasing area Sharepoint under Forms.

2.1.7 It is not possible to be definitive about what constitutes an interest or conflict of interest but it would be seen by Translink which is a Centre of Procurement Expertise (CoPE) and other Government Departments to include the following:

- Outside employment, directorships or material shareholdings. The ownership of shares in publicly owned companies would not normally constitute a declarable interest unless the holding was significant, or the award of a contract could influence the market price. Shareholdings in private companies (i.e. companies whose shares are not traded on the stock market) should be declared;
- Personal relationships (e.g. kin, marriage or partnership, close friendships);
- Fees paid for performing services.
- It can be difficult to determine when to declare a close relationship as a potential conflict of interest e.g. a close friendship. Individuals will need to assess each relationship and decide whether it could be perceived to be a potential conflict of interest. It would be advisable to err on the side of caution as this would serve to protect the integrity of both the individual member of staff and the CoPE.
- Examples of potential conflict of interest:
 - Being a director of a commercial company which has an involvement or interest in CoPE awarded contracts;
 - Undertaking work in your own time for a company which carries out work under contract for a CoPE and its customers' organisations;
 - CoPE decisions which could have an adverse affect on a member of the family (e.g. the non-award of a major contract which could place another company employing a family member in jeopardy);
 - Involvement with a voluntary body seeking to supply (or make use of) CoPE services and contracts.

The guidance above on conflicts of interest is in accordance with CPD guidance.

2.2 Clarification & abnormally low or high tenders or suspicion in the tendering process

- 2.2.1 Translink must always be diligent around the area of anti-competitive practices and suspicious situations. This area is taken very seriously and can mainly be cited in the Treaty of Rome and the Competition Act.
- 2.2.2 If a suspiciously low number of tenders are received it is recommended that immediate explanation is obtained from those who declined to tender and then if required further investigations should be conducted.
- 2.2.3 If the contents of a tender are not clear, the Tenderer must be contacted to clarify the information supplied.
- 2.2.4 A record of all clarification questions and answers shall be retained with the original tender or quotation. If a generic clarification question or request is asked of Translink the response to this must be circulated to all Tenderers.
- 2.2.5 If an offer is received which Translink determines as abnormally low special measures must be taken in accordance with the Regulations Part 5 Section 30 (6-10).
- 2.2.6 If an offer is received which Translink determines as abnormally high and the number of Tenderers is suspiciously low for example this may require further investigation.

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- 2.2.7 If any member of Translink suspects that something may need further investigation it is recommended that the Purchasing Manager is informed without delay for appropriate action to be taken.
- 2.2.8 The Purchasing Department reserve the right to halt and rerun any competition for the tendering of work which presents a risk to the impartiality, independence and integrity of Translink.
- 2.2.9 **Anti-competitive practices**; if the circumstances appear to be unusual the Purchasing Manager should be informed of the situation without delay. If there is any doubt as to whether a competition will be genuine and effective (e.g. it appears that only one tender will be received) and Value for Money may not be achieved a revision to the process may be required and new tenders should normally be sought.
- 2.2.10 Any anti-competitive practice such as price fixing is subject to control under the Competition Act 1998. If there is a strong reason to believe a Tenderer might be employing unusual pricing tactics or indulging in other anti-competitive behaviour at any stage in the Tendering process please refer to the Purchasing Manager for advice in the first instance after which consideration will be made of whether to seek advice from a Legal Adviser.

2.3 Late Pre-qualification Documentation & Tenders

- 2.3.1 It is strict Translink policy that Pre-qualification Documentation and Tenders which are received after the due time & date shall not be considered and shall be rejected preferably in an unopened state to the Tenderer. Prior warning of lateness will not alter this policy nor will electronic submissions in lieu of signed original documentation without the prior agreement of the Purchasing Manager or his representative.

2.4 Evaluation

- 2.4.1 The European Utilities Sector Procurement Directive 2004/17/EC & therefore The Utilities Contracts Regulations 2006 apply to all Translink requirements over the Threshold values. Reference must be made to the TPP109 EU Procurement Legislation topic for detailed guidance on the mandatory procedures to be followed in respect of tenders subject to the Directive. It is vital that guidance is followed for requirements over the threshold values or advertised in the OJEU as a range of legal rights and remedies are available to Tenderers who suffer, or risk suffering, loss or damage as a result of failure by Translink to comply with the requirements of EU Procurement Legislation.
- 2.4.2 The Project Managers and the Purchasing Department must consider reasonable timescales involved any project which is moving through a process of pre qualification and tender selection and communicate regularly with applicants on the progress being made. For example, Section 25 of the Regulations for Qualification Systems highlights that the Utility shall inform applicants for qualification of the success or failure of their application within at least 6 months from the date of presentation of an application and, if the decision will take longer than 4 months, the utility shall inform the applicant, within 2 months of the date of presentation of the application of:
- a. The reasons justifying a longer period; and
 - b. The date by which its application will be accepted or refused.

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2.4.3 The detailed regulations on the process of evaluation are listed The Utilities Contracts Regulations 2006 and must be referenced to ensure compliance by the evaluation panel. Part 4 of the Regulation, Qualification and Selection of Economic Operators lists important guidance on mutual recognition concerning administrative burden, equally treatment of all Economic Operators, the technical and financial conditions, and the consideration of environmental management measures under evaluation.

2.5 The criteria for the award of a contract

2.5.1 Tender Evaluation Criteria and publishing PQQ scoring criteria:

2.5.2 In accordance with the OGC Action note 04/09 released on 28th April 2009 the following action points are mandatory for all Translink procurements:

1. Contracting authorities should ensure that they maintain the distinction between selection criteria and award criteria for their procurements. Where call-off contracts are let under a framework agreement contracting authorities must ensure that appropriate award criteria are used.
2. Contracting authorities should also make sure that detailed award evaluation criteria, sub-criteria, scoring schemes and weightings are made available to bidders.
3. Details of criteria and sub-criteria, scoring, weights and pass marks used in pre-qualification questionnaires at the selection stage should also be made available to suppliers.

2.5.3 If you would like to read the OGC Action note 04/09 which details some of the background and extra detail on the action points please follow the link below:

<http://www.ogc.gov.uk/documents/PPN0409.pdf>

2.5.4 Related reading: Sharepoint announcement released on the Purchasing Sharepoint site on the 9th February 2009 and 22nd May 2009.

2.5.5 Translink shall award contracts on the basis of the offer which is the most economically advantageous from Translink's point of view for OJEU requirements. Translink does not advocate the use of awarding contracts on the basis of lowest price. It is important to note that the Procurement Board of Northern Ireland has determined that by the end of March 2009 all contracts should be awarded on the basis of Most Economically Advantageous with any exceptions to this subject to the formal approval of the Head of Procurement the relevant Centre of Procurement Expertise.

2.5.6 Translink must (Part 5 Section 30 of the Regulations) use criteria linked to the subject matter of the contract to determine the most economically advantageous tender (MEAT) reference Regulation 30 (2). This means that when using MEAT criteria it is not permissible, at award stage, to take account of criteria which are essentially linked to the Tenderers' ability to perform the contract as this in theory should have been assessed prior to inviting the company to tender for the requirement. I.e. if a PQQ is used it is this that should be assessing the applicants ability to perform the contract including the capacity, capability and financial standing of the applicant. Please reference case Emm G Lianakis and others v Dimos Alexandroupolis and others. Acceptable criteria therefore includes "running costs, cost-effectiveness, quality, aesthetic and functional

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characteristics, environmental characteristics, technical merit, after sales service and technical assistance, commitments with regard to parts, security of supply and price or otherwise” (Reg. 30(2)).

- 2.5.7 The criteria, weighting and responsibility for evaluation should be established at the Procurement Planning stage in accordance with procedure TPP101 Procurement Planning and in accordance with TPP109 EU Procurement Legislation (where this applies).
- 2.5.8 It must be clear from the outset if Tenders are to be evaluated on the basis of MEAT. Where this is the case Translink must state the criteria to be used and the weightings of those criteria in the contract notice or in the contract documents issued at ITT. Criteria for the award of a contract are listed in Part 5 Section 30 (5) of the Regulations. Those dealing with Construction/Infrastructure should note: Evaluation criteria and weightings should if possible reflect Section 8.9 QUALITY/PRICE RATIO of the CPD Construction Procurement Guide.
- 2.5.9 Criteria for rejection of economic operators; Section 26 of the Regulations cite certain reasons for the rejection of an economic operators. If Translink has actual knowledge that an economic operator or its directors or any other person who has powers of representation has been convicted of the offences listed in Section 26 Translink shall treat the economic operator as ineligible and will not select the operator to progress.
- 2.5.10 Once the evaluation is complete the scoring sheets and comments must be provided to the Purchasing Department to review and record. The Tender Report should be submitted to the Purchasing Department prior to submission to the Executive Team.

2.6 Iterative tendering

- 2.6.1 There are two distinct types of iterative tendering, 'Revise or Confirm' tenders and 'Best And Final Offers' (BAFOs). Both should be used selectively.
- 2.6.2 Revise and Confirm:

Where there are many issues to be resolved and it is proposed to keep all, or most, of the original Tenderers in the competition, formal Revise or Confirm invitations should be issued detailing the specific areas of the tenders requiring attention (tailored if necessary to suit each Tenderer) and/or additional or amended information from Translink that the Tenderer needs to consider when re-submitting his tender (in the latter case this information should be forwarded to all Tenderers involved in the Revise or Confirm tender to ensure that there can be no claims of unfairness). Revise or Confirm tenders should be treated in the same way as initial tenders, submitted through the Tender Board in the normal way and evaluated by the same Tender Assessment Panel.

Revise and Confirm allows clarification with the Tenderer(s) to address or reveal that a mistake or misunderstanding has occurred; the Tenderer(s) can be invited to adjust their tender. Opportunity must be given to all Tenderers to Revise or Confirm their tenders. If the price offered after the Revise or Confirm stage is not considered to be realistic it may be necessary to revisit the Translink economic appraisal to establish why Translink may be out of sink with the market. Once this is clearly identified then the tender process can continue in the normal way.

- 2.6.3 Best and Final Offers (BAFOs):



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The concept behind BAFOs is the search for better value for money through a further round of tendering either with all the compliant Tenderers in the preceding round, or with those most in contention for the contract (generally limited to two or three compliant Tenderers). Normally the emphasis will be on securing a reduction in the quoted prices, but this should not preclude seeking other improvements (e.g. on delivery or performance).

2.7 Post Tender Negotiation

- 2.7.1 Translink utilise for the majority of the time the Negotiated Procedure which means a procedure leading to the award of a contract whereby the utility negotiates the terms of the contract with one or more economic operators selected by it.
- 2.7.2 Following evaluation, if it is felt that the terms of an offer can be improved by negotiation e.g. price, delivery, conditions, specifications etc, this can only be undertaken by the Project Sponsor together with the Purchasing Manager or representative.
- 2.7.3 Post Tender Negotiations are intended to improve, in value for money terms, the tender submitted by the leading Tenderer. No contract should be awarded until a satisfactory price, and acceptable terms and conditions, have been agreed. The possibility of re-opening the competition remains. It should be made clear to the Tenderer with whom negotiations are to be held that contract award is dependent upon a successful conclusion to the negotiations.
- 2.7.4 The objectives of the negotiation must be clearly established and a strategy developed before meeting the Tenderer(s).
- 2.7.5 Details of the negotiation and the outcome must be recorded and retained on file.

2.8 Scoring, Recommendation and Authorisation

- 2.8.1 A robust and fair scoring mechanism must be utilised and the original scoring sheets should be placed on the Purchasing File as a record of the decisions made.
- 2.8.2 Compliance to the defined criteria (usually as defined by the ITT) shall be summarised as part of the evaluation process and must be given a score in accordance with any previously published weightings. Evidence of score, rank and decisions must be retained in order to provide constructive debriefing sessions and provide a recorded justification of decisions made. The use of a clear scoring matrix is strongly recommended using a 0 to 100 scoring system. Each of the evaluation panel members should sign the original scoring sheets to ensure agreement and accuracy of the information it is important to pay particular attention to the accuracy of the figures presented. Detailed guidance on Scoring quality and price is shown in Annex 1 to this Standard and should be adopted across Translink in an attempt to reduce procurement fraud risk.
- 2.8.3 The offers should be analysed against the prices quoted by the Tenderers to determine which one is the most attractive in that it presents the 'best overall deal' by complying with the specification, delivery, social / environmental and all other requirements.

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- 2.8.4 The primary objective is to choose the compliant tender offering the best value for money solution. If there is any doubt as to whether a competition has been genuine and effective (e.g. only one tender is received) new tenders should normally be sought.
- 2.8.5 In presentations forming part of the tender a separate set of scores will be taken and added to the scores given for the tendered proposal. Contracts should not be awarded solely on the basis of presentations. Care must be taken when using presentations as they can be subjective. If the term 'Presentation' is to be used Project Managers must be very clear about what they are using the presentation for and not confuse it with a clarification or a negotiation meeting. Presentations from Tenderers cost Translink and the Applicant resources therefore we must be sure to justify their appropriateness and what we would like to achieve by using them. If this is used during tendering it must be very clear what will be evaluated and in relation to which aspect of the evaluation criteria.
- 2.8.6 Appropriate records of the evaluation process should be retained particularly the weaknesses and strengths of each tender so that they may be used to inform any debrief requested by unsuccessful Tenderers.
- 2.8.7 If the requirement has went through an OJEU process then a TPF3056 OJEU Stage 2 Evaluation information release form must be completed by the Project Manager and forwarded to the Purchasing Department for release if requested.
- 2.8.8 Following evaluation, the most economically advantageous Tenderer will be identified and a recommendation to purchase will be made in the form of a Tender Report, submitted to Executive Group and subsequently Board if appropriate.
- 2.8.9 Board approval for requirements over the value of £10,000 to award a contract must be granted and evidenced in writing to the Purchasing Department prior to the award of any contract.

3. RELATED DOCUMENTS

- 3.1 Procedure (s) TPP101 Procurement Planning
 TPP109 EU Procurement Legislation
 TPP115 Document Control
- Form(s) TPF3051 Declaration of Interests Form
 TPF3056 OJEU Stage 2 Evaluation information release
 form

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Annex 1 Quality scoring

Clear definitions should be utilised for scoring quality and an example of some of these definitions are shown below. It is recommended that a summary of these points should be added to the evaluation scoring sheets for the evaluation panel's reference.

The Example below has been created from 2 CPD examples in 2008:
To ensure consistency, the evaluation team should be directed to mark according to this scale where appropriate:-

| Examples of Score | Examples of Assessment Standard | Examples of Detailed Measure |
|-------------------|---------------------------------|---|
| 9-10 | Excellent | <ul style="list-style-type: none"> • Excellent understanding of the criteria area. • Addresses all aspects in the criteria area. • Proposal demonstrates that Tenderer should provide outstanding products/services. • No weaknesses/and or risks presented |
| 7-8 | Good | <ul style="list-style-type: none"> • Good understanding of the criteria area. • Proposal demonstrates that Tenderer should provide good quality products/services. • Limited or no weaknesses/and or risks presented |
| 5-6 | Acceptable | <ul style="list-style-type: none"> • Acceptable understanding of the criteria area. • Proposal demonstrates that Tenderer should provide an acceptable level of quality in the products/services. • Compliant response but lacks sufficient detail to award a higher mark. • Strengths outweigh weaknesses and/or risks |
| 3-4 | Limited | <ul style="list-style-type: none"> • Limited understanding of the criteria area. • Generally compliant response • Weaknesses and/or risks outweigh strengths |
| 1-2 | Poor | <ul style="list-style-type: none"> • Poor understanding of the criteria area. • Generally non-compliant response • Weaknesses and/or risks far outweigh strengths |
| 0 | Failed | <ul style="list-style-type: none"> • Failed to understand the criteria area. • Non-compliant response • Weaknesses and/or risks would jeopardise the success of the project. |

The Project Manager should interpret what the Assessment Standard e.g. "Excellent" etc means for their requirement.

The Evaluation Scoring Sheet(s) might therefore look similar to the illustration below. It is also worth considering conducting the calculations on an excel sheet to help mitigate against miscalculation; always use a calculator to check your sums if an excel sheet is not utilised.



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The following sheet would be required for each Tenderer...

| CONTRACT NAME AND REFERENCE: | | | | |
|--|---------------|--------------------------|--|-----------------|
| NAME OF TENDERER: | | | | |
| DATE OF EVALUATION: | | | | |
| Criteria | Weight | Your Score (0-10) | Weighted Score | Comments |
| Header criteria X | 40% | | | |
| Sub criteria Understanding the requirements | 10% | 10 | = (score / max score available) multiplied by the individual weighting $10/10=1 \times 10 = 10$ | |
| | 10% | 5 | $5/10=0.5 \times 10 = 5$ | |
| | 20% | 4 | $4/10=0.4 \times 20 = 8$ | |
| Total weighted score for Header X | | | 23 | |
| Header criteria X | 20% | | | |
| | 10% | 8 | 8 | |
| | 10% | 4 | 4 | |
| Total weighted score for Header X | | | 12 | |
| Header criteria COST | 40% | N/A | 20 | |
| Total for all sections | | | 55% | |

Signed by the evaluation team

1. _____ 2. _____ 3. _____ 4. _____



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The following sheet would be required for each Project Evaluation...

Contract Evaluation Summary Sheet

Contract Title:

Contract Ref:

Company Name

| Criteria | Available Marks | [insert Company name] | [insert Company name] | [insert Company name] | [insert Company name] | [insert Company name] | [insert Company name] |
|--------------|-----------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Quality | 60 | 35 | | | | | |
| Cost | 40 | 20 | | | | | |
| TOTAL | 100 | 55 | | | | | |

The above marks and attached comments are agreed by the panel

Signed by the Project Manager:

In Capitals:

Dated:

Panel member notes:

In the first instance panel members should assess the bids independently of each other. Each panel member should start with the bids in a different order to each other to ensure that no single tender could become the standard by which all others are judged.

Each panel member will award a score (using the scaled assessment standards) under each of the criteria and record comments to back up these scores. An 'Evaluation Scoring Sheet' should be used to record scores and comments.

Once all panel members have individually marked and recorded comments on all bids the panel can convene. A single score and set of comments will be agreed under each criterion. Following the evaluation all Tenderers can request a debrief. The agreed final scores and comments from the evaluation panel will be used as the basis of this debrief including a TPF3056 OJEU Stage 2 Evaluation information release form if it is required. Any further queries from a Tenderer will be forwarded to all members of the relevant panel for response.



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Price scoring

Standardised method and formula for evaluating and scoring tenders.

Methods reviewed: CPD Construction Division's method (Mean gets a score of 50) and the CPD Supplies and Services Division's method (Cheapest gets full marks). There is not much difference between the 2 outcomes therefore to allow Translink to align with the CPD Construction Procurement Guide and CPD Supplies and Services the 1st method should be used for construction works and services and the 2nd for supplies and services.

Examples of the 2 methods are illustrated below.

Scoring formula for Construction works and services

Standardised method and formula for evaluating and scoring firm price tenders – the following Price scoring example taken from the CPD Construction Procurement Guide (May 2007).

A number of methods are available for calculating the price score but none of these have proved to show significant variation in the final result. In evaluating the Price submitted for a competition the following method will be used to calculate the Price Score.

The mean price of the lowest three tenders submitted shall be calculated, this mean is given a score of 50.

1 point is added to the score of each Tenderer for each percentage point below the mean and 1 point is deducted from the score of each Tenderer for each percentage point above the mean (all calculations will be carried to two decimal places).

Tenders received and ranking shown

| Tenderer (T) | Price |
|--------------|------------|
| 3 | £2,450,625 |
| 2 | £2,375,500 |
| 4 | £2,760,225 |
| 1 | £2,225,125 |
| 5 | £2,915,125 |

Mean of the lowest 3 calculated

| Tenderer (T) | Price |
|--------------|------------|
| 3 | £2,450,625 |
| 2 | £2,375,500 |
| 1 | £2,225,125 |

£7,051,250



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$$\frac{£7,051,250}{3} = £2,350,417 = 50 \text{ points}$$

Scoring of Tenderers using mean

$$\frac{\text{Avg} - T}{\text{Avg}} \times 100 + 50 = \text{Score} \quad (T = \text{Actual Tender price submitted})$$

$$\text{Tender T1} = £2,225,125$$

$$\frac{2,350,417 - 2,225,125}{2,350,417} \times 100 + 50 = 55.33$$

Where the formula generates a score > 100 or < 0, maximum and minimum scores of 100 or 0 will apply respectively.

Summary of calculation of tenders in competition

| Tenderer (T) | Price | Price Score |
|--------------|------------|-------------|
| 3 | £2,450,625 | 45.74 |
| 2 | £2,375,500 | 48.93 |
| 4 | £2,760,225 | 32.56 |
| 1 | £2,225,125 | 55.33 |
| 5 | £2,915,125 | 25.97 |


The Price Score is then weighted in accordance with the criteria stated in the tender documents.

For this theoretical example with a Quality:Price weighting of 60:40, Tender number 1 begins with a score of 55.33. To alter this score to a weighted score the following calculation is needed:

$$\text{Price score} \times \text{Project price weighting} = \text{Total weighted price}$$

$$55.33 \times 0.4 = 22.13$$

The weighted score of 22.13 out of 40 is then added to the quality weighted score to give the overall score for this tender.

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Scoring formula for Supplies and Services

Standardised method and formula for evaluating and scoring tenders (supplied by CPD Supplies and Services August 2008)

The formula is based on the bidder with the lowest cost (who meets the requirement) gets the highest marks. All other scores are worked out on a pro rata basis.

For this theoretical example a Quality:Price weighting of 60:40 has been used therefore the available weight for price is 40%.

Firstly the cheapest gets full marks i.e. 40 marks. Then to work out the scores of the others the cheapest is divided by the other Tenderers price and multiplied by the weighting to equal the total marks each Tenderer should get.

| | |
|---------------|---|
| Bidder A £100 | Bidder A = 40 marks |
| Bidder B £200 | Bidder B = $100/200 \times 40 = 20$ marks |
| Bidder C £400 | Bidder C = $100/400 \times 40 = 10$ marks |

Evaluation of day rates

- Firstly before you issue the ITT you should try to establish the grades used in the market or benchmark grades used by the market sector an OGC example is illustrated below (this may alter depending on market e.g. solicitors use different types of grade).
- Then prior to ITT release, the pricing pages used should make reference to pricing on this generic basis in an attempt to mark using a like for like technique.
- When the Tenders come back scoring can be conducted by using the formula set for pricing above.

Grade requirements / Grading Definitions

Consultants must possess the following skills and knowledge according to their grade:

| Grade | Requirement |
|-------------------|---|
| Junior consultant | Demonstrable experience in a wide range of projects in their specialist field. Evidence of client facing experience and support services to wider consultancy projects. |
| Consultant | Notable experience and in-depth knowledge of their specialist field. Evidence of a wide range of consultancy projects and client facing |



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| | experience. Support work in process and organisational design and leading workshops and events. |
| Senior consultant | Substantial experience in their specialist field and in a consultancy/training role. Previous experience in project management and working in a wide range of high quality and relevant projects. Familiarity of the issues/problems facing public sector organisations. |
| Principal consultant | Substantial experience in their specialist field and in a consultancy/training role. Sound knowledge of the public sector and current policy and political issues affecting it. Previous experience in project management on at least three major projects, preferably in the public sector and using the PRINCE2 or equivalent method. |
| Managing consultant | Substantial experience in their specialist field and in a consultancy role. In depth knowledge of the public sector and of current policy and political issues affecting it. Previous experience in project management on at least five major projects, preferably in the public sector and using the PRINCE2 or equivalent method. |
| Director / Partner | Extensive experience in their specialist field, in which they are nationally or internationally renowned as an expert. Extensive experience of leading or directing major, complex and business-critical projects; bringing genuine strategic insight. In depth knowledge of the public sector and of current policy and political issues affecting it. |

In addition to the above experience, consultants and trainers will be expected to possess relevant accreditation, qualifications and certification applicable to their disciplines. (OGC Guide to consultancy pricing 2008)