

APPENDIX 3.20B VALUE FOR MONEY (VFM) MEASURES – FULL MARKS APPROACH AND FEE DIVING CONTROL MECHANISM

A. “Full Marks Approach”

1. Selection criteria which will adopt the “Full Marks Approach” are marked grey below:

(i) Expression of Interest (EOI) Submission

<i>Selection Criterion</i>	<i>Marking Approach</i>
1. Appreciation of key requirements and constraints/risks	Individual Qualitative Assessment
2. Approach and strategy to meet the requirements	
3. Previous relevant experience	Full Marks if Meeting Specifications
4. Knowledge, experience and capability of key staff	
5. Past performance	Past Performance Rating

(ii) Technical Proposal

<i>Selection Criterion</i>	<i>Marking Approach</i>
1. Consultant's experience	Full Marks if Meeting Specifications
2. Response to the Brief	
3. Approach to cost-effectiveness and sustainability	Individual Qualitative Assessment
4. Methodology and work programme	
5. Innovation and creativity	
6. Staffing	Full Marks if Meeting Specifications
7. Past Performance	Past Performance Rating

2. Full Marks will be attained by consultant if the consultant is able to meet quantitative specifications to be set out by the Assessment Panel. However, each assessment panel member shall individually assess whether the quantitative specifications have been met.

<i>Selection Criterion</i>	<i>Specification</i>
EOI Submission	
3. Previous relevant experience	Number of relevant consultancy assignments conducted by the consultant ¹
4. Knowledge, experience and capability of key staff	Core personnel's years of post-qualification experience and number of relevant job reference ²

¹ For attaining full mark (i.e. grade VG) in Item 3 of the EOI Submission or Item 1 of Technical Proposal, a consultant shall possess experience on having conducted [5] or more relevant consultancy assignments within [10] years on or before the original or the extended EOI/ T&F proposal submission closing date as agreed by the Assessment Panel (AP) and specified in the EOI/T&F invitation documents. Likewise, the criteria for the other grades shall be determined accordingly. Same set of criteria shall be adopted in both the EOI and T&F invitation documents. The format of marking guideline may be as follows (for illustrative purpose only):

No. of relevant consultancies involved	Grade
[5] or more	VG
[3] to [4]	G
[1] to [2]	F
0	P

² For attaining full mark (i.e. grade VG) in Item 4 of EOI Submission or Item 6(b) of Technical Proposal, a core personnel (including staff down to Team Leaders) shall possess certain minimum qualification and experience, e.g. a staff belonging to Partner/Director Category as Project Manager, and shall have not less than [20] years post qualification experience and not less than [5] relevant job references as agreed by the AP and specified in the EOI/T&F invitation documents. Likewise, the criteria for the other staff categories shall be determined accordingly. The procuring department shall specify the minimum number of core personnel and their respective designations in the EOI/T&F invitation documents. Marks allocated to each core personnel under the same designation shall be on equal basis. If the undertakings signed by non-fulltime core personnel to confirm their involvement in undertaking the designations cannot be produced, the staff concerned shall be considered as failure to meet the requirements and "P" shall be marked for the staff concerned accordingly. Same set of criteria shall be adopted in both the EOI and T&F invitation documents. The format of the marking guideline may be as follows (for illustrative purpose only):

Key Staff	Post Qualification Experience	Relevant Job Reference	Grade
Project Manager (Mark: XX%) Minimum qualification of a P/D category	Not less than [20] years	Not less than [5] projects	VG
	Not less than [18] years	Not less than [3] projects	G
	Not less than [15] years	Not less than [1] project	F
	Fail to meet the standard above		P

<i>Selection Criterion</i>	<i>Specification</i>
Technical Proposal	
1. Consultant's experience	Number of relevant consultancy assignments conducted by the consultant (similar to Item 3 for EOI Submission)
2. Response to the Brief	Number of key issues/problems identified in the assignment with practicable suggestions on ways of addressing them ³
6. Staffing	
(a) Staff organization chart	Organization chart submitted will be marked using four different grades according to pre-set descriptions ⁴
(b) Relevant experience and qualification of key staff	Core personnel's years of post-qualification experience and number of relevant job reference (similar to Item 4 for EOI Submission)

³ For attaining full mark (i.e. grade VG) in Item 2 of Technical Proposal, a consultant should identify in the Services [5] or more key issues/problems with practicable suggestions on ways of addressing them as agreed by the AP and specified in the T&F invitation documents. Likewise, the criteria for the other grades shall be determined accordingly. The format of marking guideline may be as follows (for illustrative purpose only):

No. of key issues/problems identified	Grade
[5] or more	VG
[3] to [4]	G
[1] to [2]	F
0	P

⁴ The pre-set descriptions for the four different grades are follows:

Description	Grade
Very efficient and effective staff organization with strong teams of experts and professionals and comprehensive communication and collaboration platforms	VG
Efficient and effective staff organization with well-defined teams of experts and professionals and suitable communication and collaboration platforms	G
Fair staff organization showing reasonable teams of experts and professionals and communication and collaboration platforms	F
No information or a poor staff organization	P

<i>Selection Criterion</i>	<i>Specification</i>
Technical Proposal	
(c) Responsibility and degree of involvement of key staff	Degree of involvement of staff, in term of weighted manpower input, with professional category or above named in the technical proposal ⁵ .
(d) Adequacy of professional and technical manpower input	Same as the mechanism stipulated in DEVB TC(W) No. 2/2016, with the application of the multiplier for provision of overloaded staff in the tender ⁶ .

⁵ For attaining full mark (i.e. grade VG) in Item 6c, a consultant should propose at least [80%] of the weighted total manpower input to be named staff with professional category or above as agreed by the AP and specified in the T&F invitation documents. Likewise, the criteria for the other grades shall be determined accordingly. The format of marking guideline may be as follows (for illustrative purpose only):

Degree of Involvement (X)	Grade
$X \geq [80]\%$	VG
$[60]\% \leq X < [80]\%$	G
$[40]\% \leq X < [60]\%$	F
$X < [40]\%$	P

where X is calculated by using the following formula:

$$\frac{\text{Weighted manpower input of named staff with professional category or above}}{\text{Weighted total manpower input}} \times 100\%$$

⁶ Where the information, together with clarifications from the consultant (if any) reveals overloading situation in the manpower input, mark to be given for the “adequacy of professional and technical manpower input” attribute shall be adjusted by the Assessment Panel using the following as a guide:

Overloading Situation	Degree of Overloading	Marks for “Adequacy of professional & technical manpower input” shall be multiplied by (exact multiplier to be decided by the Panel)
Minor	$\leq [5]\%$	0.9 to 0.95
Medium	$> [5]\%$ and $< [10]\%$	0.8 to 0.9
Serious	$\geq [10]\%$	0.7 to 0.8

Notwithstanding the above, the following circumstances will be considered as “Serious” overloading situations:

- Where the consultant or any of its proposed sub-consultant fails to provide the first manpower input updating to enable the procuring departments to endorse it for existing consultancies (i.e. consultancies with EOI submissions or Technical and Fee Proposals (for one-stage procedure) invited before 3 December 2018); or
- Where the consultant fails to provide the manning schedule in the Technical and Fee Proposal to enable the procuring departments to properly perform the assessment of overloading situation (refer to Appendix 3.20F for details).

B. Fee Diving Control Mechanism

A threshold is set at 80% of the Median Consultancy Fee (Fx) which is the median of consultancy fees of all conforming bids and the pretender estimated consultancy fee worked out by the procuring department for that particular assignment.

If the lowest fee quoted is higher than or equal to 0.8 Fx, the assessment method of weighted consultancy fee score will be the same for all bids, i.e. the formula below will apply:

$$\begin{array}{l} \text{Weighted} \\ \text{Consultancy} \\ \text{Fee Score} \end{array} = \begin{array}{l} \text{Specified} \\ \text{weighting} \end{array} \times \frac{\begin{array}{l} \text{Lowest fee among all} \\ \text{confirming bids} \end{array}}{\text{Fee of bid being assessed}}$$

If the lowest fee quoted is less than 0.8Fx, any fees quoted below 0.8Fx will get the full fee score and other fees quoted will get score by applying the formula below:

$$\begin{array}{l} \text{Weighted} \\ \text{Consultancy} \\ \text{Fee Score} \end{array} = \begin{array}{l} \text{Specified} \\ \text{weighting} \end{array} \times \frac{0.8F_x}{\text{Fee of bid being assessed}}$$