Commonwealth House, Walsall — Consultant Appointment Brief: Needs and Demand Assessment, Community Consultation and Military–Civilian Engagement

Commissioning organisation: Walsall Community Association
Project: Commonwealth House, Walsall — Military and Civilian Engagement
Version: Version 1 and 16 November 2026
Brief reference / issue date: NACC / authorised issue date: 13:11/2028
Contract period / completion date: Start Date: 10 December 2026, Completion date: 28 February 2027
Budget and VAT treatment: Mandatory ceiling of £2,500 excluding VAT, inclusive of all fees, expenses and third-party delivery costs; VAT is payable in addition where applicable
Submission deadline: 30 November by 2:00pm
Submission method / contact: Email: walsallcommunityassociation@outlook.com
FAO: Chair of Trustees Ms Yvonne Vassell
Clarification deadline: 30th November 2026 , 12:00 noon
Clarification channel / response period: Written channel through email - common response 48 hours
Consultation type: Non-statutory engagement
Proposed site / assessed catchment: 36 Wolverhampton Road Walsall WS2 8PR, geographical catchment – Walsall and surrounding areas

1. Background and purpose

Walsall Community Association invites proposals from an independent consultant to establish whether there is an evidenced need and realistic demand for the proposed Commonwealth House project, and whether Walsall is an appropriate location. The proposed purpose is to support military and civilian engagement, connecting serving personnel, veterans, military families, local residents and community organisations.

The assessment must inform whether to proceed, modify the proposal, pilot activities, work through existing provision or not proceed. It must not assume that community support establishes demand.

The appointment covers the consultation type stated in the appointment details. Applicable consultation requirements and client responsibilities are set out in **Heritage Revival Fund – Project Development Grant PDG**1142.

2. Objectives

- Enable informed participation while proposals remain open to influence, clearly explaining what can and cannot change.
- Reach a broad cross-section of affected communities and stakeholders, including people who do not normally participate.
- Gather balanced evidence on priorities, concerns, opportunities, and options through accessible, proportionate methods.
- Provide impartial analysis that distinguishes differing views and acknowledges gaps and limitations.
- Close the feedback loop by explaining what was heard and how it informed the client's decisions.

Core assessment questions:

1. Is the project needed? What needs are unmet, what provision already exists, and what additional contribution could the project make?
2. Why Walsall? What evidence supports this location, considering catchment, accessibility, partnerships and reasonable alternative locations or delivery models?
3. What demand exists? Who would use the proposed activities, services, or facilities, how often, under what conditions and at what scale?

3. Scope of services

3.1 Mobilisation and consultation design

Review project documents, previous consultation, relevant local evidence, and existing provision. Agree objectives, the catchment, research questions and recruitment approach with the client; refine survey-response and workshop-attendance recruitment targets without reducing the mandatory survey, interview, or workshop baseline in Section 3.2. Map stakeholders and participation barriers and prepare an inception plan covering methods, evidence gaps, outreach, accessibility, resources, approvals, timetable and risks. Changes to mandatory delivery volumes require prior written change control under Sections 6 and 9, not informal agreement after appointment.

3.2 Engagement delivery

Develop neutral questions and balanced consultation materials for client approval and deliver the common engagement baseline below with military and civilian participants, residents, existing providers, and potential partners, including people beyond existing project supporters.

Provisional common baseline: deliver one survey through digital and paper routes, open for at least three weeks; six interviews of approximately 30 minutes each; and two facilitated workshops of approximately 60 minutes each, with a planning target of six to ten participants per workshop.

Distribute the survey through at least four agreed community or partner channels, including at least two outside the project's existing supporter network, and make one reminder through each channel.

The six interviews and two workshops are mandatory planned delivery volumes; survey response numbers and workshop attendance are recruitment targets, not guaranteed outcomes. Record invitations, participation, non-response, and corrective outreach. Where interview participation or workshop attendance falls short, promptly notify the client, document outreach through the agreed channels and one follow-up invitation to each non-responding interview invitee, and offer a suitable alternative time or participation format within the approved resources. Do not require attendance or replace missing evidence with assumed responses. Apply the exception acceptance process in Section 4.1; additional activities or extensions outside the baseline require prior written change control.

Test preferred activities, intended frequency of use, travel, timing, affordability barriers and potential organisational bookings or referrals, distinguishing general support from intended use and confirmed commitments.

The baseline is a proportionate research package, not evidence of representative population coverage or a guarantee of demand. Price the common scope and specified client inputs and raise any deliverability concern through the clarification channel before submission.

3.2.1 Common resources and accessibility baseline

Client contribution: supply the approved proposal, site and catchment information, existing evidence and consultation records; arrange introductions and publicity through agreed channels; and provide a suitable accessible venue without charge for the two workshops.

Consultant contribution: include research design, survey setup and paper-response processing, interview and workshop facilitation, recruitment coordination, one

reminder per distribution channel, analysis, reporting and handover in the mandatory fixed fee.

Provide plain-English materials, a paper survey route, readable electronic documents, large-print versions on request and a telephone-assisted response option; agree venue access and participation arrangements before invitations are issued.

Specialist accessibility support: None

Essential accessibility provision must not depend on an unpriced option. The common scope must identify its provider and cost allocation; raise any missing provision through the clarification channel before submission.

3.3 Analysis, reporting, and feedback

Analyse qualitative and quantitative evidence transparently to answer each core question. Distinguish general interest from credible intended use and confirmed commitments; avoid double counting participants, visits, and bookings. Triangulate findings and disclose contrary evidence, sampling limitations and uncertainty. Provide low, central, and high demand scenarios only where defensible, without treating self-selected responses as representative of the wider population. Prepare evidence-based recommendations, a client presentation and a public-facing summary, and support the client to explain how findings informed its decision.

Provisional presentation and feedback-support baseline: include one remote findings presentation to the client's nominated group, lasting up to 60 minutes including questions, with editable slides; one plain-English public summary of up to four A4 pages, supplied in editable and accessible PDF formats; and up to two hours of written support to help the client prepare its response to the findings.

Supply draft slides and the public summary with the draft report for the same consolidated feedback cycle and include their finalisation in the single revision round in Section 4.1. The client must supply its proposed decision and response wording within that feedback cycle; the consultant must check its factual alignment with the evidence without endorsing or determining the client's decision.

The client retains responsibility for approving, publishing, and distributing its response. Public meetings, additional presentations, ongoing communications and support beyond the stated allowance are outside the mandatory baseline unless incorporated into the common scope before issue or authorised through written change control within the contract ceiling.

Boundaries and exclusions: the geographical focus is Walsall and surrounding black country regions, with the site and assessed catchment stated in the appointment details. This commission covers independent needs and demand assessment, location

rationale and community consultation. It excludes technical design, specialist legal advice and a full financial feasibility study unless separately specified. Where evidence is insufficient, identify further research or a pilot needed before investment decisions.

4. Deliverables and acceptance

- **Inception plan:** methods, engagement activities, stakeholder and existing-provision mapping approach, timetable, participation measures, evidence gaps and risk register.
- **Consultation pack:** approved information, questions, publicity copy and agreed accessible versions.
- **Delivery record:** activity log, participation figures, emerging issues and outreach adjustments.
- **Draft and final needs and demand report:** explicit answers to whether the project is needed, why Walsall and what realistic demand exists; an existing-provision map, service-level demand findings, assumptions, limitations, defensible scenarios where supported, evidence-based recommendations and a response matrix linking findings to proposed client actions. Specify further testing where evidence is insufficient.
- **Plain-English summary, presentation and response support:** provide the public summary, presentation slides, one findings presentation to the nominated client group and bounded written response support specified in Section 3.3; include these in the mandatory fixed fee and the consolidated revision arrangements.
- **Handover:** editable materials and appropriately anonymised data with an agreed data dictionary and retention arrangements.

4.1 Acceptance measures

Need: identify the unmet needs evidenced, map relevant existing provision and explain the proposed project's additional contribution, with sources and contrary evidence traceable to each conclusion.

Why Walsall: assess the agreed site and catchment against accessibility, potential partnerships and at least two reasonable alternative locations or delivery models, explaining the evidence and limitations behind the recommendation.

Demand: report unique respondents separately from anticipated visits and organisational bookings, distinguishing expressed interest, intended use and verified commitments and stating assumptions about frequency, travel, timing and affordability.

Evidence sufficiency: where the evidence cannot support a conclusion or demand scenario, report "insufficient evidence", identify the missing information and

recommend a defined further test or pilot rather than extrapolating unsupported demand forecasts.

Delivery: demonstrate completion of the approved engagement baseline and supply the activity record, anonymised evidence and recommendation-to-action matrix. If participation prevents completion of six interviews or delivery of a workshop despite the documented recruitment and recovery measures in Section 3.2, identify the shortfall, its effect on the findings and the evidence limitations. The named acceptance reviewer may accept that shortfall only through a written exception decision confirming the required measures were completed and all feasible remaining outputs were delivered; acceptance is not automatic and does not establish sufficient demand evidence. Any additional activity, changed scope or extension must be agreed under Sections 6 and 9 before it is undertaken.

Review arrangements: supply editable report and spreadsheet files, a PDF report and presentation slides; allow five working days for consolidated client feedback and include one consolidated revision round.

The client acceptance reviewer named in Section 9 must confirm acceptance in writing against these measures and record any participation-shortfall exception under this section. Acceptance must not depend on the findings supporting project progression. An exception may recognise evidenced inability to secure participation after the required recovery measures; it must not excuse omitted outreach, avoidable supplier non-delivery or deficient analysis. Acceptance and associated payment are governed by Section 6 and the approved contract; scope, date or cost changes require the separate delegated authority specified in Section 9.

5. Programme and milestones

Contract dates and milestones are set out below and in the appointment details. Programme approved consultation materials before fieldwork, a survey open for at least three consecutive weeks, sufficient analysis time, five working days for consolidated draft-report feedback and one revision round before final acceptance. Common client approval allowances: inception plan 4 working days; consultation materials 7 working days. Supplier revision allowance: 7 working days. After appointment, detailed scheduling may be refined within those allowances without reducing the mandatory baseline; changes affecting scope, dates or cost require written change control under Sections 6 and 9.

The issued programme must place draft slides and the public summary alongside the draft report for the same five-working-day consolidated feedback period, identify when the client will supply its proposed response, and allow the published supplier revision period before final outputs, the findings presentation and handover. Programme the

bounded response support in Section 3.3 within the confirmed contract period; client delay does not create an automatic unpaid extension and must be addressed through Sections 6 and 9.

Milestone	**Target date**
Clarification question deadline	30th November 2026 by 2:00pm
Proposal submission / appointment	10th December 2026
Inception and plan approval	15th December 2026
Consultation materials approved	20th December 2026
Consultation opens / closes	20th December opening date / closing date: 20th January 2027
Draft report / client feedback	15th February 2027
Final report, public feedback and handover	24th February 2027

6. Budget and pricing

The mandatory total contract ceiling is £2,500 excluding VAT, inclusive of all fees, expenses and third-party delivery costs; VAT is payable in addition where applicable and must be shown separately. Submit an undiscounted mandatory-scope fixed fee and identify any unconditional discount separately. The evaluated mandatory-scope price is that fee less any admissible unconditional discount under Section 8.3.1, excluding VAT and separately priced optional services; use this same net price for ceiling compliance, the eligible-price benchmark and price scoring. The accepted net price is the mandatory-scope contract fee, not a temporary evaluation-only reduction. [Final discount and non-positive-price policy to be confirmed in Section 8.3.1.]

Provide a fixed-fee breakdown by stage showing staff time, day rates and supplier-paid expenses, including travel, printing, digital tools and the accessibility provision allocated to the consultant in Section 3.2.1. Identify client-provided workshop venues and other client resources separately as supplied without charge to the consultant; do not add venue hire to the mandatory fee or assume additional unlisted client inputs. Show specialist interpreting, translation or communication support against the specified provider and common provision, including all supplier-provided costs in the mandatory fee. Raise any unconfirmed essential support through the clarification channel; do not leave it as an unpriced option.

State assumptions, exclusions, optional activities and third-party costs separately; all mandatory services must be included in the standalone net fixed fee without requiring purchase of an option. Evaluated mandatory-scope prices exceeding £2,500 excluding VAT are non-compliant. Non-positive-price treatment is specified provisionally in Section 8.3.1 [final policy to be confirmed]. Separately priced options are excluded from evaluated price, quality scoring and tie-break decisions; any options or variations commissioned must keep total contract expenditure within the same £2,500 ceiling excluding VAT.

Payment will be linked to accepted milestones: as detailed above in this document percentages totalling 100%. Written acceptance under Section 4.1, including a properly authorised participation-shortfall exception, constitutes acceptance of the relevant milestone for the approved payment schedule and does not itself reduce the agreed milestone fee. The exception does not excuse supplier non-delivery or waive applicable contractual remedies; any proposed fee or scope change requires a separate written variation by the authorised role in Section 9 and must remain within the £2,500 total ceiling excluding VAT.

Payment terms are 28 days under contract and payment-schedule reference, subject to applicable statutory requirements. The client will process invoices promptly and notify the supplier promptly of any issue concerning validity or dispute, with reasons; milestone review or exception recording must not postpone payment beyond an applicable statutory deadline. No additional work or expenditure may be undertaken without prior written approval from the authorised variation role.

7. Proposal requirements

Submit a proposal of no more than 2 pages, excluding:

1. Understanding of Commonwealth House's military and civilian engagement purpose, the three core assessment questions and the requirement for independent conclusions.
2. Proposed research and consultation methodology delivering the mandatory activity volumes and resource baseline in Sections 3.2–3.2.1, the presentation and response-support baseline in Section 3.3 and the reporting requirements in Section 9; explain stakeholder outreach, accessible participation, recovery measures and how unmet need, the location rationale and realistic demand will be assessed. Identify recruitment targets separately from mandatory delivery volumes. Separately priced optional services must stand apart and do not earn quality points.
3. Delivery programme, milestones, risks and mitigation measures.

4. Declarations of conflicts of interest, proposed subcontractors and confirmation of ability to meet the client's contract requirements.

Use the submission method, contact and deadlines stated in the appointment details. Material clarifications will be shared consistently with all bidders through the stated clarification channel. The milestone dates in Section 5 must match the appointment details.

7.1 Supplier response and authoritative requirements

Structure the proposal against the requirements in Section 7 and cross-reference supporting evidence to the published evaluation sub-criteria.

Use Section 2 for the assessment questions, Section 3 for the delivery scope and common resource baseline, Section 4 for outputs and acceptance, Section 5 for the programme, Section 6 for budget and pricing, Sections 8.1–8.5 for assessment rules, Section 10 for contractual requirements and Section 11 for supporting information.

The appointment details at the start of the brief are the authoritative submission particulars; Section 5 must reproduce the same approved dates.

Price the mandatory scope on the common baseline without relying on purchase of optional services or additional client inputs not specified in Section 3.2.1.

Raise inconsistencies through the designated written clarification channel before the clarification deadline, citing the relevant document reference, revision and section.

Material clarifications will be shared consistently with bidders; informal discussions do not vary the published requirement.

7.1.1 Receipt, completeness and clarification policy

Submit all required proposal sections, the mandatory-scope pricing schedule and declarations through the designated method by the published deadline, including its time zone. The designated system or mailbox receipt time is the submission record; starting an upload or sending a message before the deadline does not establish timely receipt. Bidders are responsible for allowing sufficient submission time.

Provisional policy: submissions received after the deadline will not proceed. Where permitted by the applicable process, a documented client-side submission-system failure may result in a revised deadline communicated consistently to all bidders; no bidder will receive an individual time extension.

Provisional policy: a missing mandatory-scope price, omitted material proposal section or substantive departure from the mandatory scope will not proceed. A missing administrative declaration or ambiguity in information submitted on time may be

clarified only where permitted, without introducing a new substantive offer and with consistent treatment of equivalent cases.

Written clarification requests will use the common response period stated in the appointment details, with consistent treatment of equivalent cases. Assessment will use the original proposal and permitted written clarifications only; clarification must not introduce unpermitted price changes, new substantive methodology, purchase-dependent compliance or additional evaluation stages.

8. Evaluation and appointment

Assessment approach: written proposals and permitted written clarifications only.

Criterion	**Weight**
Methodology and understanding of the brief	30%
Inclusive outreach and accessibility	20%
Application of contract lessons and proposed resourcing	20%
Programme, risk management and quality assurance	10%
Evaluated price	20%
Total	**100%**

Proposals will be evaluated using the detailed matrix and rules in Sections 8.1–8.5. Quality accounts for 80 points and price for 20 points, giving a maximum total of 100 points. Appointment is subject to the applicable procurement process, satisfactory checks and execution of the contract.

8.1 Detailed quality evaluation matrix

Score each sub-criterion once on the 0–5 scale in Section 8.2. The weight shown is its maximum contribution to the total score, not a percentage of its parent criterion. Assess the evidence requested below; do not introduce undisclosed criteria or double-count the same feature under different headings.

Assess delivery of the published mandatory baseline, including the bounded presentation, response support and reporting requirements, rather than bidder-selected reduced activity volumes. Separately priced options and services conditional on purchasing them are excluded from every quality sub-criterion and the tie-break. An included enhancement earns points only where it is an unconditional commitment within the mandatory fixed fee, directly addresses an existing published sub-criterion

and demonstrates the relevant scoring descriptor; do not create an extra-volume criterion or award points merely for offering more activities.

Ref. / sub-criterion	Weight	Evidence required and assessment focus
A1. Understanding of the brief	10%	Understanding of Commonwealth House's military and civilian engagement purpose, unmet need, why Walsall and realistic demand; local context, existing evidence, decision boundaries and impartial conclusions, including modification or non-progression.
A2. Consultation design and delivery	12%	Justified methods to deliver the published mandatory survey, interview and workshop volumes in Section 3.2 on the Section 3.2.1 resource baseline; existing-provision research, neutral questions, recruitment beyond existing supporters, distinct recruitment targets, documented participation-recovery measures, impartial facilitation and practical fieldwork logistics. Assess feasibility and quality of the included approach, not separately priced extras or reduced mandatory volumes.
A3. Analysis, reporting and feedback	8%	Transparent triangulation and analysis; distinction between expressed support, intended use and firm commitments; treatment of duplicate responses, conflicting evidence and self-selection; defensible demand assumptions and uncertainty; traceable answers to all three questions; and an evidence-aligned public summary, findings presentation and bounded client-response support under Section 3.3.
A. Methodology subtotal	**30%**	Sum A1–A3; do not score the subtotal separately.
B1. Stakeholder mapping and outreach	10%	Mapping and outreach covering military and civilian participants, local residents, existing providers and potential delivery or referral partners, including people beyond existing networks; identification of participation gaps and adjustments during delivery.
B2. Accessible participation	10%	Digital and non-digital options; accessible venues, materials and formats; language support where needed; convenient timing; explicit resources and costs for removing participation barriers.
B. Inclusive outreach subtotal	**20%**	Sum B1–B2.
C1. Contract-specific	10%	Use comparable consultation case studies to identify relevant challenges and lessons, then explain precisely how those lessons will be applied to this

application of lessons		commission and the credible benefits for delivery. Score the evidenced contract-specific application and justification, not general supplier experience, years trading, number or value of past contracts, organisational size or reputation. Any supplier eligibility evidence is checked separately against published requirements; do not rescore it here or double-count methodology or resourcing features assessed under other sub-criteria.
C2. Proposed resourcing and continuity	10%	Contract-specific role allocation, relevant expertise, committed capacity, staff-day allocation, subcontracting arrangements and contingency cover. Assess the proposed delivery arrangements rather than personal characteristics.
C. Contract lessons and resourcing subtotal	**20%**	Sum C1–C2.
D1. Programme and management	5%	Realistic milestones, dependencies, client approval periods, progress reporting and change control; sufficient time for participation and analysis.
D2. Risk and quality assurance	5%	Specific risks, owners and mitigation; checks on evidence and deliverables; secure information handling, safeguarding where relevant and escalation arrangements.
D. Delivery assurance subtotal	**10%**	Sum D1–D2.
Total quality	**80%**	Add weighted scores for the nine sub-criteria only.

8.2 Quality scoring descriptors and calculation

Score	Descriptor	Application to each sub-criterion
0	No adequate response	Absent, irrelevant or provides no assessable evidence addressing the requirement.
1	Poor	Addresses only a small part of the requirement; major omissions, unsupported assertions or an approach that does not demonstrate credible delivery.
2	Partially meets	Addresses some requirements with relevant evidence, but material gaps or weaknesses leave delivery insufficiently demonstrated.

3	Meets	Addresses the requirement with a clear, feasible approach and sufficient relevant evidence; any minor gaps do not materially undermine delivery.
4	Strong	Fully addresses the requirement with detailed, project-specific evidence and a robust approach; demonstrates meaningful, credible benefits within the assessed scope.
5	Excellent	Comprehensive, compelling and well-evidenced response with no material weaknesses; demonstrates exceptional reliability and tangible benefits relevant to the requirement.

Weighted sub-criterion points = (agreed raw score ÷ 5) × sub-criterion weight. For example, a score of 4 against A2, weighted at 12%, earns 9.6 points. Use integer raw scores, retain full calculation precision and round only the displayed final totals to two decimal places.

Mandatory minimum quality gate: A proposal must achieve at least 48 out of 80 weighted quality points overall and an agreed raw score of at least 3 out of 5 in each of A2 (Consultation design and delivery), B2 (Accessible participation) and D2 (Risk and quality assurance). All four conditions must be met using moderated integer raw scores and unrounded weighted quality totals. A proposal failing any condition is ineligible for price scoring, overall ranking or appointment; a higher price score cannot compensate for failure. Apply and record the gate after quality moderation and before identifying the lowest eligible evaluated price. If no proposal passes, make no appointment under this evaluation and refer next steps to the procurement lead.

Gate boundary checks: Exactly 48/80 overall and exactly 3/5 in A2, B2 and D2 pass the gate when all four conditions are met. An overall score below 48/80, or a score below 3/5 in any one of those three sub-criteria, fails the gate regardless of other scores.

8.3 Price assessment: 20 points

Evaluate the net mandatory-scope fixed price defined in Section 6, excluding VAT and separately priced optional services, on the common scope in Section 3. Apply the final discount and non-positive-price rules in Section 8.3.1 through the compliance checks in Section 8.4 [final policy to be confirmed].

8.3.1 Discount and non-positive-price rules

Accept an unconditional discount only where it is stated separately in the submitted pricing schedule, applies to the entire mandatory scope and remains valid throughout the stated proposal-validity period and for execution of the mandatory-scope contract. Deduct that admissible discount from the submitted undiscounted fee to establish the net evaluated mandatory-scope price defined in Section 6; use that net price for ceiling

compliance, the eligible-price benchmark, price scoring and the mandatory-scope contract fee.

Do not apply discounts conditional on purchasing optional services, changing the mandatory scope or accepting different payment terms; request clarification only where permitted and do not allow an unpermitted revised offer.

Provisional non-positive-price policy: require an evaluated mandatory-scope price greater than zero and no more than the ceiling in Section 6; record zero or negative evaluated prices as non-compliant.

A low positive price is not automatically non-compliant; apply the investigation arrangements stated in this section where deliverability is in question.

Price points = (lowest eligible evaluated price ÷ bidder's evaluated price) × 20.

The lowest eligible evaluated price earns 20 points; eligibility requires compliance with Sections 6 and 8.4 and passage of the mandatory quality gate in Section 8.2.

Worked example: lowest eligible price £2,000; another eligible price £2,500. Price points = (£2,000 ÷ £2,500) × 20 = 16.00. A quality total of 64.00 gives an overall score of 80.00/100. Price completeness is a compliance check, not an additional undisclosed scored criterion; assess delivery quality only under the relevant quality sub-criteria.

Where a price appears abnormally low, seek an explanation and supporting delivery evidence before deciding whether it may be disregarded under the applicable rules. Do not automatically reject a proposal solely because its price is low.

8.4 Compliance and eligibility checks

Before scored evaluation, record whether each proposal satisfies the published submission and mandatory requirements. Distinguish supplier eligibility or conditions of participation from scored award criteria. Confirm any applicable exclusion checks through the client's procurement process.

Check	Requirement
Submission requirements	Submit the required proposal sections, mandatory-scope pricing schedule and declarations by the deadline and time zone in the appointment details. Receipt, completeness, permitted clarification and client-side system-failure treatment follow Section 7.1.1.
Mandatory scope and pricing	Provide the undiscounted mandatory-scope fee, separately stated admissible unconditional discount and net evaluated price under Sections 6 and 8.3.1. Include all mandatory services and supplier-paid costs on the Section 3.2.1 baseline without requiring an option. Net evaluated prices above £2,500 excluding VAT are non-compliant; zero or negative prices follow Section 8.3.1. Options

	are excluded from eligibility benchmarking and all scoring; commissioned options or variations remain within the total ceiling.
Conflicts and eligibility	Provide conflict declarations and any mitigation or eligibility decision will follow the applicable procurement process.
Insurance and required assurances	Provide the evidence or commitment listed in Section 10 at the specified stage; no additional retrospective requirements apply.
Decision	A proposal will proceed, receive permitted written clarification or not proceed under the published requirements; the client will retain the decision and reasons.

8.5 Panel evaluation, moderation and ranking

1. Appoint a panel with suitable procurement and consultation expertise; record confidentiality and conflict-of-interest declarations before access to bids.
2. Evaluators score quality independently using the published descriptors and proposal evidence. Where practicable, complete quality scoring before revealing prices to reduce price bias.
3. Moderate scores to an agreed integer score for each sub-criterion. Record the evidence and reasons for consensus, including changes from individual scores; do not simply average scores or alter criteria to favour an outcome.
4. Handle clarification consistently through the procurement lead, retain an audit trail and do not permit changes outside the applicable process. Assessment uses written proposals and permits written clarifications only. Tender interviews and presentations are not part of the assessment, do not change scores and are not used to resolve ties. The post-appointment findings presentation required in Section 4 is a contract deliverable, not a tender-assessment stage.
5. Apply the mandatory quality gate in Section 8.2 after quality moderation; exclude failed proposals from the eligible-price benchmark, price scoring and ranking. Calculate price points for eligible proposals, then rank them by unrounded quality-plus-price totals. Independently check calculations.
6. For an exact tie in unrounded overall points, prefer the proposal with higher unrounded total quality points, then higher A2 weighted points. If still tied, the procurement lead will conduct a witnessed random draw among the remaining tied proposals, with one identical concealed entry per bidder and an equal chance of selection. An independent witness with no declared conflict will observe the preparation and draw. Record the tied scores, bidder identifiers, method, date, participants, witness confirmation and outcome; retain the record in the procurement file. Do not introduce further criteria, interviews or revised offers to break the tie.

7. Document the recommendation, approvals and reasons; provide bidder feedback and complete any applicable notification and standstill requirements before contract execution.

9. Governance and client responsibilities

The consultant will report to the project lead identified below. Provisional meeting baseline: include three remote client meetings of up to 30 minutes each in the mandatory fixed fee; an inception meeting, one fieldwork progress meeting and one draft-findings review meeting. The Section 4 findings presentation is a separate deliverable. Provide one short written update each week during the stated contract period covering activities, participation, expenditure, risks, decisions needed and upcoming milestones. Escalate significant concerns promptly to the project lead; additional meetings or extensions require prior written change control under Sections 6 and 9.

Client authority schedule: project lead and escalation contact Martin Levermore MBE DL, contact: martin.levermore@mdti.co.uk ; deliverable acceptance reviewer and participation-shortfall exception decision-maker Martin Levermore MBE DL, contact: martin.levermore@mdti.co.uk, and authority reference: WCA/01/2026/ PDG1142; authorised scope/date variation approver Martin Levermore MBE DL, Project Lead and delegated authority reference WCA/01/2026/ PDG1142; authorised cost variation approver Mr Leslie Hayes Treasury and delegated financial authority reference WCA/PDG1142.

The project lead coordinates delivery and consolidated feedback but may not accept outputs, approve exceptions or authorise variations unless expressly named for those functions. One person may hold multiple roles only where the commissioning organisation records the relevant authority; retain separate decisions identifying acceptance, exception approval and any variation.

Acceptance of a participation-shortfall exception under Section 4.1 does not automatically vary scope, dates or fee. Record its evidence, findings limitations and milestone-payment implications; obtain separately authorised written change control for any additional work or altered contractual commitment. All authorised variations remain subject to Section 6 and the total contract ceiling.

The client contributions and consultant resource assumptions are specified in Section 3.2.1; the client retains responsibility for project decisions, formal approvals, consolidated feedback and publication of its response.

Changes to scope, dates or cost require prior written agreement and must comply with the ceiling and variation controls in Section 6.

10. Contractual and professional requirements

- **Independence:** disclose actual or potential conflicts of interest and maintain balanced facilitation and reporting.
- **Information management:** agree confidentiality, data-protection roles, lawful collection, privacy notices, secure storage, access controls, retention and deletion arrangements before collecting personal information. Apply relevant data-protection requirements and anonymise published findings appropriately.
- **Participation and safety:** provide accessible arrangements and proportionate event risk assessments; agree safeguarding procedures and any role-specific checks where required.
- **Insurance and subcontracting:** provide evidence of [required insurance types and limits] at [specified evidence or commitment stage]. Subcontractors and changes to key personnel require prior client approval.
- **Ownership and use:** ownership or licensing of commissioned outputs, treatment of pre-existing intellectual property and the client's reuse rights are set Commonwealth House, Walsall: Needs and Demand Assessment, Community Consultation and Military–Civilian Engagement contract.
- **Contract terms:** the Commonwealth House, Walsall: Needs and Demand Assessment, Community Consultation and Military–Civilian Engagement contract sets out acceptance and participation-shortfall exceptions under Section 4.1, named authorities under Section 9 and payment under Section 6. It must distinguish accepted evidenced participation shortfalls from supplier non-delivery and specify remedies and dispute arrangements, together with written variations, liability, termination and handover. Final contract terms and payment schedule to be supplied.

11. Information to accompany the brief

The accompanying information comprises the current Commonwealth House proposal; previous consultation methods and findings; existing provision and potential partners; accessibility and communications requirements. Aspirations, forecasts and expressions of interest must be identified separately from verified facts and commitments.