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## Incorporating behavioural assessment within a strategic, large scale procurement process

### Summary

- Our client – the Environment Agency (EA) - wanted to enhance its procurement process so it could measure a bidder's performance against a defined set of behaviours, which it deemed critical for delivering the contract. This would set a new standard, as the first public sector procurement process to include a behavioural component that was on a par with the design, commercial and legal aspects.
- Recognising that behavioural performance was fundamental to the project's likely success, we engaged with the EA to design a bespoke behavioural framework, as well as a set of challenging scenarios to measure the bidders' leadership and management aptitude against it. The framework and scenarios considered aspects of the project that, in the client's experience, could go wrong once the contract was awarded. This level of robustness gave the framework validity in the bidders' eyes. It also meant the framework could assess behaviours with the same rigour the EA applied to the technical aspects of each bid, while being discerning enough to highlight the strengths and weaknesses of each team.
- The result was a rich set of observed behavioural responses from each bid team, which will help our client to identify its delivery partner and create the foundations for a strong and collaborative working relationship.

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### Assessing bidders' behaviour during a large scale infrastructure procurement exercise

The EA was about to procure a construction project that would run for up to ten years. It had a well-developed process for assessing a bid's technical and financial components but it lacked a key predictor around overall performance once the bidder was in situ - its behaviours and ways of working.

Construction projects are complex and have many inherent uncertainties, so the EA wanted a delivery partner who would genuinely share its values and behaviours. This would allow it to move away from the traditional client-contractor relationship, which can endorse the wrong behaviours, towards a more sophisticated and collaborative partnership.

The EA therefore asked us to work with it on its pathfinder project, to jointly design a behavioural 'blueprint' assessment methodology. This would ultimately help it to identify a delivery partner, as well as giving it a methodology it could apply across other large scale procurements.

### Our approach

Our client already had an internal behavioural framework but it recognised the value of creating a new, more aligned framework that would underpin the project's key objectives. We therefore started by working with them to define its model, benchmarking it against market research into successful collaboration and alliancing, reviewing it against different competency frameworks and leveraging our own expertise.

This provided us with a model that defined what success would look like for the contract. We then created positive and negative behavioural indicators against each competency heading. These included the contractor's ability to set high standards, commit to shared success, be customer centric, take responsibility and implement strong governance.

It was vital that the framework was clear, measurable, robust and valid. This meant it could be clearly communicated to the bidders and they, in turn, could identify how they fulfilled the criteria. Our client validated the model and, in the tender documentation it sent to bidders, set out the evaluation criteria and their respective weightings.

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With the tailored behavioural framework in place, we could then create the methodology for assessing the bidders' behaviour. This needed to be as robust as the technical and financial assessments, while being discerning enough to highlight the bid teams' strengths and weaknesses.

In partnership with the EA, we developed a set of exercises to measure the bidders' leadership and management teams, who would be central to the project's delivery. All the exercises were tailored for the bid and the EA's input ensured they reflected genuine problems the bidders might face.

The four exercises were:

- **A behavioural interview**, which was based on the client's behavioural model and required the candidate to complete an occupational personality questionnaire.
- **A role-play**, involving an independent role-player, which required the candidate to address a situation while responding to the role-player's views and interests. The exercise mirrored the project team's likely interface with members of the public and challenged them to balance competing environmental, political, financial and construction priorities.
- **A written exercise**, which simulated a project activity the candidate would be involved with, and measured how they structured their thinking and anticipated and dealt with problems. The start-up phase of a construction project is challenging, so candidates were asked to identify the key risks and challenges and explain how they would manage them. Written responses were reviewed and discussed in a Q&A format, with an assessor probing the responses.
- **A group discussion**, with teams given background information and then working together to deliver a common set of objectives. The exercise assumed the bidder had been awarded the contract and team members were now coming together to discuss their project mobilisation plan. Meeting outputs were communicated but the team had to discuss and agree the order in which they approached the initiative, targeting which stakeholders and for what purpose.

To add realism, time pressure and fluidity, the team were sent memos with additional requests, which they needed to include in their overall submission.

Each of the bidders attended a one-day assessment centre, which tested the bidders at the management level. The assessments measured the same competency multiple times, ensuring the candidate's score was not overly influenced by a single exercise. We carefully scrutinised the exercise formats to remove any unnecessary bias, and to ensure consistency we facilitated all the exercises and trained 30 EA employees to act as assessors. This meant the assessors understood the purpose and structure of the day, the behavioural framework itself and the exercises they would be involved in.

The majority of the bid teams had a joint venture component and they had not always worked together before. We designed the exercises to deconstruct the teams, so we could see if they depended on a few key players or were cohesive and had strength in depth. The exercises also enabled the bid teams to be cognisant of their strengths and how they could overcome some of their limitations.

### The outcome

The behavioural framework and assessment exercises proved highly effective, giving the EA an early snapshot of the probable performance of each bid team. It will also be able to give meaningful and objective feedback to successful and unsuccessful bidders, as it would for other aspects of the tender process.

Once our client has chosen its partner, it will be able to apply the behavioural framework to its own people, to identify and select a team that will be more likely to work collaboratively and constructively with the delivery partner. The pathfinder also created a blueprint and new standard for behavioural assessment's role, importance and validity as part of the tender process. Establishing, early on, how a bidder will respond to the challenges and uncertainties it is most likely to face, and how it will deal with differences of opinion, is a key differentiator between an average and effective tender process.

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A key takeaway was that we adopted an interdisciplinary approach, successfully integrating the legal, procurement and assessment aspects, so they worked alongside each other. This enhanced the overall methodology and demonstrated the EA's attitude to joined-up thinking and working.

As a final benefit, the trained assessors gained observation, recording and assessment skills that will be useful in managing their own staff and in other managerial contexts, and will enable our client to develop an enhanced internal recruitment and selection process.

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