

# Invitation to Quote



**Medical  
Research  
Council**

**Invitation to Quote (ITQ) on behalf of UK Research and Innovation  
(UKRI)**

**Subject: UKRI Centre for Macaques NHP Health Screening**

**Sourcing Reference Number: RE22232**

**UK Shared Business Services Ltd (UK SBS)**  
[www.uksbs.co.uk](http://www.uksbs.co.uk)

Registered in England and Wales as a limited company. Company Number 6330639.  
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VAT registration GB618 3673 25  
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Version 8.0

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**UKSBS**  
*Shared Business Services*

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## Section 1 – About UK Shared Business Services

### Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our Contracting Authorities improve efficiency, generate savings and modernise.

It is our vision to become the leading service provider for the Contracting Authorities of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our Contracting Authorities. This allows Contracting Authorities the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by the Department for Business, Energy & Industrial Strategy (BEIS), UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

### Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business, Energy and Industrial Strategy (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Contracting Authorities. Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

### **Privacy Statement**

At UK Shared Business Services (UK SBS) we recognise and understand that your privacy is extremely important, and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UK SBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.

- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

<https://www.uksbs.co.uk/use/pages/privacy.aspx>

For details on how the Contracting Authority protect and process your personal data please follow the link below:

<https://www.ukri.org/privacy-notice/>

## Section 2 – About the Contracting Authority

### UK Research and Innovation

Operating across the whole of the UK and with a combined budget of more than £6 billion, UK Research and Innovation represents the largest reform of the research and innovation funding landscape in the last 50 years.

As an independent non-departmental public body UK Research and Innovation brings together the seven Research Councils (AHRC, BBSRC, EPSRC, ESRC, MRC, NERC, STFC) plus Innovate UK and a new organisation, Research England.

UK Research and Innovation ensures the UK maintains its world-leading position in research and innovation. This is done by creating the best environment for research and innovation to flourish.

For more information, please visit: [www.ukri.org](http://www.ukri.org)

### Medical Research Council (MRC)

MRC is at the forefront of scientific discovery to improve human health. Their scientists tackle some of the greatest health problems facing humanity in the 21st century, from the rising tide of chronic diseases associated with ageing to the threats posed by rapidly mutating micro-organisms.

<https://mrc.ukri.org/>

## Section 3 - Working with the Contracting Authority.

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	UK Research and Innovation Polaris House North Star Avenue Swindon SN2 1FL
3.2.	Buyer name	Thomas Ellis
3.3.	Buyer contact details	<a href="mailto:Research.tenders@uksbs.co.uk">Research.tenders@uksbs.co.uk</a>
3.4.	Estimated value of the Opportunity	Lot 1: £30,000.00 Lot 2: £55,000.00 Total potential Contract Value: £85,000.00
3.5.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available <a href="#">here</a>. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</b>

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Tuesday, 12 April 2022 Contracts Finder
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Monday, 18 April 2022 14:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Tuesday, 19 April 2022 14:00
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Friday, 22 April 2022 11:00
3.10.	Anticipated notification date of successful and unsuccessful Bids	Wednesday, 27 April 2022
3.11.	Anticipated Contract Award date	Wednesday, 27 April 2022
3.12.	Anticipated Contract Start date	Monday 02 <sup>nd</sup> May 2022
3.13.	Anticipated Contract End date	30 <sup>th</sup> April 2024
3.14.	Bid Validity Period	60 Days

## Section 4 – Specification

### Introduction

The MRC Centre for Macaques (CFM) is a national facility at the Porton Down site, Salisbury and works to develop best practice in animal welfare, to promote physical and mental well-being of the macaques within the Centre and to share these practices with the wider primate care community. The CFM takes seriously its animal welfare responsibilities; it aspires to be a centre of excellence in primate welfare and to facilitate studies of animal behaviour and welfare within the captive environment

The purpose of this procurement is to obtain services (and any associated consumables) for the processing and pathogen testing of biological samples taken from rhesus macaques at the Centre for Macaques during routine health screening.

Each year the centre carries out health screening on the rhesus macaques to test for a variety of pathogens that can be dangerous to both macaques and humans. Screening is required to maintain the health and safety of both the macaques and the humans (including staff) who come into contact with them.

Services are required to carry out serological, bacteriological, parasitological and PCR testing on biological samples.

The majority of the specifications for health screening in NHPs come from the FELASA recommendations on health monitoring in non-human primate colonies (<https://journals.sagepub.com/doi/full/10.1177/0023677219844541>). The exception to this is the new need to test for the Covid-19 virus. Rhesus macaques are capable of catching the Covid-19 virus as evidenced by their use as a model for vaccine development and reports from studies of Covid-19 in rhesus macaques suggest that they may show little or no symptoms of infection. To protect both macaques and humans the list of diseases to test for has been expanded to include Covid-19

### Aims & Objectives

The aim of this project is to obtain health screening services for the Rhesus macaques at the CFM, including annual health screens and ad hoc screens. The services include the processing and pathogen testing of biological samples taken from the Rhesus macaques, as well as the reporting of all the test results. The services also include the supply of

consumables for the samples taken for the screens, and the transportation of the samples for the annual health screens

The Annual Health Screen shall include:

Serology: one blood sample per animal (or more depending on the Supplier's requirements) to be tested for the following

- Simian Herpes B-Virus (B-virus)
- Simian immunodeficiency virus (SIV)
- Simian T-cell lymphotropic virus (STLV)
- Simian type D Retroviruses (SRV[D])
- Measles
- Covid-19

Faecal cultures: one rectal swab per animal to be tested for the following

- Salmonella
- Shigella
- Yersinia
- Campylobacter

Parasitology: 3 pooled faecal samples per group of animals to be examined for parasites

The Ad-hoc Screens: In addition to the above there will be additional samples to process throughout the year including three-day rectal swabs to test for salmonella, shigella, campylobacter and Yersinia, and nasal/throat swabs to test for Covid-19 via PCR.

Certain screens will also require some follow up testing in the event of a positive result

### **Background to the Requirement**

Health screening of non-human primates (NHPs) is designed as a way of monitoring diseases that can be harmful to human and/or macaque health. Some diseases such as Herpes simian B-virus can cause minor illnesses in macaques similar to the cold sore virus but can be deadly in humans. Other illnesses such as measles have been increasing in the human population and would cause serious issues if transferred to macaques. The main requirements for health screening are given in the FELASA (federation of European Laboratory Animal Science Associations) guidelines on health monitoring of non-human primates (<https://journals.sagepub.com/doi/full/10.1177/0023677219844541>).

The major ongoing change to the health screening requirements has been the new requirement to test for Covid-19. Rhesus macaques can be infected with Covid-19 (they have been used in studies of Covid-19 and vaccines). The transmission of Covid-19 from humans to macaques is unknown but it likely to be a significant risk (recent studies have shown Covid-19 transmission from humans to other species including cats and dogs). To monitor the risk of Covid-19 in the colony there will need to be two types of testing. 1) Serology testing for antibodies to SARS-COV2 (the virus that causes Covid-19) across the colony to monitor past infections. 2) PCR (polymerase chain reaction) tests across a selection of animals (e.g. those for issue) to check for current infection.

### **Scope**

This requirement is split into two lots;

Lot 1 – Serology (Annual Heal Screens and Follow up tests)

Lot 2 – Faecal Cultures and Parasitology

Annual health screens take place over 3-4 months each year in accordance with a set timetable and ad hoc screens taken throughout the year as and when required.

The services are to include the processing and pathogen testing of samples taken from the Rhesus macaques at the CFM for the below screens, as well as the reporting of all the test results. The services are also to include the supply of consumables for the samples taken as part of all of the screens

### **Lot 1 – Serology (Annual health screens and follow-up tests)**

**Annual Health Screens (per individual animal):** samples taken one day per week, 10-25 animals per day, estimated total of 200 animals per year

- One blood sample per animal (or more depending on the Supplier's requirements) to be tested for Simian Herpes B virus, SIV, STLV, SRV(D), measles and Covid-19 antibodies.

**Follow-up Testing:** Follow-up testing might be required in the advent of a positive test for measles or Covid-19

**Scope:** Services to include the processing and pathogen testing for serology, as well as reporting of test results. Services to also include the supply of consumables (primary sample containers) for the blood samples.

It is anticipated that approximately 200 individual animals will be subject for the annual testing

### **Lot 2 – Faecal Cultures and Parasitology (Annual health screens, ad-hoc screens and follow-up tests)**

**Annual Health Screens (per individual animal):** samples taken one day per week, 10-25 animals per day, estimated total of 220 animals per year

- One rectal swab per animal to be cultured for 4 different strains of bacteria (Campylobacter, Shigella, Salmonella and Yersinia)

**Annual Health Screen (per group of animals):** samples taken one day per week, 1-2 groups per day, estimated total of 20 groups per year

- 3 pooled faecal samples per group to be examined for parasites (estimated total of 60 samples per year)

**Ad-hoc Screens:** Ad-hoc limited screens: the following for approximately 40 animals per year but this could vary significantly

- Three rectal swabs per animal taken on successive days to be cultured for 4 different strains of bacteria (Campylobacter, Shigella, Salmonella and Yersinia).

**Follow-up Testing:** Follow-up testing might be required in the advent of a positive test for Shigella, Salmonella and Yersinia

**Scope:** Services to include the processing and pathogen testing from rectal swabs (for faecal cultures) and pooled faecal samples (for parasitology) as well as reporting of test results. Services to also include the supply of consumables (rectal swabs and culture medium for the faecal cultures, sample pots for the pooled faecal samples for parasitology).

It is anticipated that approximately 220 animals across 20 groups will be subject for the annual testing and approximately 40 animals for the ad-hoc testing.

Excluded from the health screening are plasma chemistry and haematology analyses

## Requirements

### Lot 1

Accreditation:

- The Supplier is required to be ISO9001:2015 approved

Screens:

- The Supplier is required to provide accurate serological on blood samples from non-human primates (rhesus macaques). Please refer to the Specific tasks section below.
- The Supplier must obtain prior approval from UKRI for any changes in screening methodology

Processing and results

- The Supplier is required to start processing all samples within 48 hours of receiving them
- The Supplier is required to provide test results within 7 days of receiving samples. In the event of a positive result, the Supplier should inform UKRI of the positive results as soon as possible.
- Results should be available electronically in an agreed format for the CFM and the named veterinary surgeon to access (either through a dedicated portal or sent by email)
- The Supplier is required to keep records of results for 10 years and make available to UKRI upon request
- The Supplier must have staff available to discuss results and any further tests

Positive results – follow up tests

- Annual Health Screens
  - In the event of a positive serological result for Covid-19 and measles in the serological testing during the annual health screens, the Supplier may be required to repeat a second test on a second sample at the request of UKRI. The second test will only be required to test for the virus that the first test was positive for. Results should be given as a positive or negative for the presence of the antibodies of the virus for each animal.

### Consumables

- The Supplier is required to provide the sample kits sufficient to collect all of the samples required for the annual health screens and ad hoc screens, including any additional samples required for secondary tests following a positive result. As a minimum the kits should contain the items essential to collect the samples, including the primary receptacles and swabs (depending on the test). For the avoidance of doubt, the Supplier does not need to supply needles or syringes.
- The Supplier is required to supply the sample kits for annual health screen prior to the start of the annual health screen each year. Numbers to be advised by UKRI prior to the annual health screen.

### Shipping

- UKRI are able to arrange shipment of the blood samples within the UK for next day delivery. Suppliers have The Supplier has the option of supplying their shipping charges in the price schedule.
- If the Supplier carries out the health screens outside of the UK and therefore the samples need to be shipped outside of the UK, the Supplier must arrange for the shipping
- If the Supplier carries out the health screens outside of the UK and therefore the samples need to be shipped outside of the UK, the Supplier must provide all of the necessary permits including the CITES permit at no extra cost

### Contract Management

- The Supplier must provide a monthly summary of all tests completed
- The Supplier may be required to attend contract management meetings

### Specific tasks

#### 1) Annual health screen

##### a) Serological testing

Samples will be provided in the form of one blood sample per animal, unless more samples are required by the Supplier to complete the testing requirements. These samples must be tested for the presence of antibodies against simian B-virus, simian immunodeficiency virus, simian T-cell lymphotropic virus, simian type D Retroviruses, measles and covid-19. Results should be given as a positive or negative for the presence of the antibodies to each virus and for each individual animal.

#### Key performance indicators:

- 100% of results reported no more than 7 days from receipt of the samples
- 100% of customer service queries responded to within one working day

### **Lot 2**

#### Accreditation:

- The Supplier is required to be ISO9001:2015 approved

#### Screens:

- The Supplier is required to provide accurate bacteriological and parasitological on biological samples from non-human primates (rhesus macaques). Please refer to the Specific tasks section below.
- The Supplier must obtain prior approval from UKRI for any changes in screening methodology

#### Processing and results

- The Supplier is required to start processing all samples within 48 hours of receiving them
- The Supplier is required to provide test results within 7 days of receiving samples. In the event of a positive result, the Supplier should inform UKRI of the positive results as soon as possible. For clarity, the Supplier must provide the test results within 7 days of receipt of the third sample for the ad-hoc three-day bacteriological testing, however, the Supplier should still inform UKRI as soon as possible if any of the samples have a positive result e.g. if the first sample gives a positive result, the Supplier should inform UKRI as soon as possible and not wait until all three samples have been received and tested (although the Supplier will still need to test the remaining samples and report the results). Notwithstanding the foregoing, the Supplier does not need to inform UKRI of positive results for Campylobacter and Parasitological testing as soon as possible – these results can be provided within the standard 7 days but no later.
- Results should be available electronically in an agreed format for the CFM and the named veterinary surgeon to access (either through a dedicated portal or sent by email)
- The Supplier is required to keep records of results for 10 years and make available to UKRI upon request
- The Supplier must have staff available to discuss results and any further tests

#### Positive results – follow up tests

- Annual Health Screens
  - In the event of a positive culture of salmonella, shigella or Yersinia in the bacteriological testing during the annual health screens, the Supplier will be required to type the cultured bacteria and identify the strain. Results should identify the strain of bacteria for each animal. The Supplier is required to report the results of this follow up testing with 7 days of the initial positive result. For the avoidance of doubt, this is not required for a positive culture of campylobacter.
- Ad hoc Screens
  - In the event of a positive culture of salmonella, shigella or Yersinia in the three-day bacteriological testing during the annual health screens, the Supplier will be required to type the cultured bacteria and identify the strain. The Supplier will only be required to do this for one of the samples that tested positive per animal. The Supplier is required to report the results of this follow up testing with 7 days of the initial positive result. For the avoidance of doubt, this follow up testing is not required for a positive culture of campylobacter.

### Consumables

- The Supplier is required to provide the sample kits sufficient to collect all of the samples required for the annual health screens and ad hoc screens, including any additional samples required for secondary tests following a positive result. As a minimum the kits should contain the items essential to collect the samples, including the primary receptacles and swabs (depending on the test). For the avoidance of doubt, the Supplier does not need to supply needles or syringes.
- The Supplier is required to supply the sample kits for annual health screen prior to the start of the annual health screen each year. Numbers to be advised by UKRI prior to the annual health screen.
- With regards to the sample kits for the ad hoc screens, the Supplier is required to supply sample kits sufficient for 50 ad-hoc three-day bacteriological screens (150 individual samples) at the start of the contract, with the option for UKRI to contract the Supplier when more are required (with a couple of weeks' notice to supply them).

### Shipping

- UKRI are able to arrange shipment of the blood samples within the UK for next day delivery. The Supplier has the option of bidding for an additional lot to cover shipping.
- If the Supplier carries out the health screens outside of the UK and therefore the samples need to be shipped outside of the UK, the Supplier must arrange for the shipping. If the Supplier carries out the health screens outside of the UK and therefore the samples need to be shipped outside of the UK, the Supplier must provide all of the necessary permits including the CITES permit at no extra cost.

### Contract Management

- The Supplier must provide a monthly summary of all tests completed
- The Supplier may be required to attend contract management meetings

### Specific tasks

#### 1) Annual health screen

##### a) Bacteriological testing

Samples will be provided in the form of a single rectal swab per animal. This swab must be used to culture four different strains of bacteria (Campylobacter, Salmonella, Shigella and Yersinia). Results should be given as the presence/absence of each strain for each individual animal.

##### b) Parasitological testing

Samples will be provided in the form of 3 pooled faecal samples per group. These samples must be examined under a microscope for the presence of parasites and their ova and the parasites identified. Results should list any parasites for each pooled sample.

#### 2) Ad-hoc testing

a) Three-day bacteriological testing

Samples will be provided in the form of three rectal swabs per animal (each swab taken on consecutive days). Each swab must be used to culture four different strains of bacteria (Campylobacter, Salmonella, Shigella and Yersinia). Results should be given as the presence/absence of each strain for each individual animal and each individual swab. The results from the three swabs can be reported at the same time but the Supplier should inform UKRI of any positive result as soon as possible.

Key performance indicators:

- 100% of results reported no more than 7 days from receipt of the samples
- 100% of customer service queries responded to within one working day

**Timetable**

- The contract commencement date shall be April 1<sup>st</sup> 2022 and the contract duration shall be 2 years.
- The annual health screening will take place over 3-4 months of the year, the Supplier will be given 4 weeks' notice of the start of the annual health screening and a timetable for that year. UKRI will keep the Supplier updated on any cancellations/postponements.
- For 2022 the health screening may start the week beginning the 9<sup>th</sup> May 2022
- Samples for the annual health screen will be collected one day per week during the annual health screening (in accordance with the timetable provided by UKRI).
- UKRI will contact the Supplier to book in the ad hoc screens using an agreed ordering system and then post the samples to the Supplier. UKRI may sometimes have urgent requests and as such, the Supplier must be ready to receive samples to process for urgent ad hoc screens at short notice (such as the next day)
- The Supplier will be required to start processing the samples within 48 hours of receiving them
- The Supplier will be required to provide reports on the outcome of the tests within 7 days of receiving the samples but the Supplier should inform UKRI of positive results as soon as possible. Please refer to the requirement section for more details.
- The annual health screens shall be paid in three equal monthly instalments each year during the annual health screening period. A reconciliation shall be completed at the end of each annual health screening to determine if any further payment or credit is due. The first payment shall be due at the end of the first month of the annual health screens. All other screens (ad-hoc and follow up testing) shall be invoiced at the end of the month they were processed.

**Terms and Conditions**

Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

## Section 5 – Evaluation model

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

The evaluation and if required team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required. After evaluation and if required moderation scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 (5+5+6 =16÷3 = 5.33)

<b>Pass / Fail criteria</b>		
<b>Questionnaire</b>	<b>Q No.</b>	<b>Question subject</b>
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Commercial	FOI1.1	Freedom of Information
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Firm and Fixed Price
Price	AW5.4	E Invoicing
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
Quality	PROJ1.1	Laboratory Facilities
Quality	PROJ1.5	Changes to Methodology approval
-	-	Invitation to Quote – received on time within e-sourcing tool
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

## Scoring criteria

### Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

Questionnaire	Q No.	Question subject	Maximum Marks
Quality	PROJ1.2	Business Continuity	10%
Quality	PROJ1.7	Results reporting	5%
<b>LOT 1</b>			
Lot 1	LOT1 AW5.2	Price	50%
Lot 1	PROJ2.1	Capability	25%
Lot 1	PROJ2.2	Capacity	5%
Lot 1	PROJ2.3	Shipment of Samples	2.5%
Lot 1	PROJ2.4	Screening Methodology	2.5%
<b>LOT 2</b>			
Lot 2	LOT2 AW5.2	Price	50%
Lot 2	PROJ3.1	Capability	22.5%
Lot 2	PROJ3.2	Capacity	5%
Lot 2	PROJ3.3	Shipment of Samples	2.5%
Lot 2	PROJ3.4	Annual Screening Process	2.5%
Lot 2	PROJ3.5	Ad-hoc Screening Process	2.5%

## Evaluation of criteria

### Non-Price elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20%.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.

20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

#### Example

Evaluator 1 scored your bid as 60  
 Evaluator 2 scored your bid as 60  
 Evaluator 3 scored your bid as 40  
 Evaluator 4 scored your bid as 40  
 Your final score will  $(60+60+40+40) \div 4 = 50$

Once the above evaluation process has been undertaken and the scores are apportioned by evaluator(s) this will then be subject to an independent commercial review and moderation meeting, if required by the commercial lead, any and all changes will be formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.

**Price elements** will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation:  $\text{Score/Total Points multiplied by 50}$  ( $80/100 \times 50 = 40$ )

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criteria, but will still be subject to a commercial review.

## Evaluation process

The evaluation process will feature some, if not all, the following phases.

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> <li>• ITQ logged upon opening in alignment with UK SBS's procurement procedures.</li> <li>• Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to the Contracting Authority or the e-sourcing tool beyond the bidder control are responsible for late submission.</li> </ul>
Compliance check	<ul style="list-style-type: none"> <li>• Check all Mandatory requirements are acceptable to the Contracting Authority.</li> <li>• Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.</li> </ul>
Scoring of the Bid	<ul style="list-style-type: none"> <li>• Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.</li> </ul>
Clarifications	<ul style="list-style-type: none"> <li>• The Evaluation team may require written clarification to Bids</li> </ul>
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> <li>• Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.</li> </ul>
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> <li>• To review the outcomes of the Commercial review</li> <li>• To agree final scoring for each Bid, relative rankings of the Bids</li> </ul>
Due diligence of the Bid	<ul style="list-style-type: none"> <li>• the Contracting Authority may request the following requirements at any stage of the Procurement.</li> <li>• Submission of insurance documents from the Bidder</li> <li>• Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder</li> <li>• Taking up of Bidder references from the Bidders Customers.</li> <li>• Financial Credit check for the Bidder</li> </ul>
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>• To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.</li> </ul>

## **Section 6 – Evaluation questionnaire**

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on how to register and use the e-sourcing portal is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

## Section 7 – General Information

### What makes a good bid – some simple do's

#### DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the ITQ shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay, is solely attributable to the Contracting Authority
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may reject your Bid.
- 7.5 Do ensure you utilise the Delta eSourcing messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear, concise and ideally generic contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English.
- 7.12 Do check and recheck your Bid before dispatch.

## What makes a good bid – some simple do not's

### DO NOT

- 7.13 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.14 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.15 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.16 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.17 Do not contact any UK SBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.18 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.19 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.20 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.21 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.22 Do not exceed word counts, the additional words will not be considered.
- 7.23 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.24 Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via e-sourcing tool. Responses received by any other method than requested will not be considered for the opportunity.

**Some additional guidance notes** 

- 7.25 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Delta eSourcing, Telephone 0845 270 7050
- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the Delta eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Delta eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of

any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.

- 7.41 All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through the Delta eSourcing Portal.
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, the Contracting Authority may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to the Contracting Authority during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

- 7.43 The Government introduced its new Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> April 2014 to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

<https://www.gov.uk/government/publications/government-security-classifications>

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

#### **USEFUL INFORMATION LINKS**

- [Contracts Finder](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

## 8.0 Freedom of information

8.4.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UK SBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.

8.4.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.

8.4.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.

8.4.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.

8.4.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UK SBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this ITQ Bidders are agreeing that their participation and contents of their Response may be made public.

## 8.5. Response Validity

8.5.1 Your Response should remain open for consideration for a period of 90 days. A Response valid for a shorter period may be rejected.

## 8.6. Timescales

8.6.1 [Section 3](#) of the ITQ sets out the proposed procurement timetable. the Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

## 8.7. The Contracting Authority's Contact Details

8.7.1 Unless stated otherwise in these Instructions or in writing from UK SBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants and advisers) during the period of this procurement must be directed through the e-sourcing tool to the designated UK SBS contact.

8.7.2

All enquiries with respect to access to the e-sourcing tool may be submitted to Delta eSourcing on 0845 270 7050 please note this is a free self-registration website and this can be done by completing the online questionnaire at <https://uksbs.delta-esourcing.com/>

8.7.3 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the e-sourcing tool. Failure to follow this requirement will result in disqualification of the Response.

## Appendix 'A' Glossary of Terms

TERM	MEANING
"UK SBS"	means UK Shared Business Services Ltd herein after referred to as UK SBS.
"Bid", "Response", "Submitted Bid", or "ITQ Response"	means the Bidders formal offer in response to this Invitation to Quote
"Bidder(s)"	means the organisations being invited to respond to this Invitation to Quote
"Central Purchasing Body"	means a duly constituted public sector organisation which procures supplies/services/works for and on behalf of contracting authorities
"Conditions of Bid"	means the terms and conditions set out in this ITQ relating to the submission of a Bid
"Contract"	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
"Contracting Bodies"	means the Contracting Authority and any other contracting authorities described in the Contracts Finder
"Contracting Authority"	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
"Customer"	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
"Due Diligence Information"	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
"EIR"	mean the Environmental Information Regulations 2004 together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
"FoIA"	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
"Invitation to Quote" or "ITQ"	means this Invitation to Quote documentation and all related documents published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. <b>NOTE:</b> This document is often referred to as an Invitation to Tender within other organisations
"Lot"	means a discrete sub-division of the requirements
"Mandatory"	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.

<b>“Named Procurement person ”</b>	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
<b>“Order”</b>	means an order for served by any Contracting Body on the Supplier
<b>“Other Public Bodies”</b>	means all Contracting Bodies except the Contracting Authority
<b>“Supplier(s)”</b>	means the organisation(s) awarded the Contract
<b>“Supplies / Services / Works”</b>	means any supplies/services and supplies or works set out at within <u>Section 4 Specification</u>