

Invitation to Quote



Invitation to Quote (ITQ) on behalf of UK Research and Innovation - EPSRC

Subject: Tender for training provision for EPSRC Panel Process Observers Pilot

Sourcing Reference Number: GSS23445

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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

Innovate UK Innovate UK works with people, companies and partner organisations to find and drive the science and technology innovations that will grow the UK economy. They drive growth by working with companies to de-risk, enable and support innovation.

<https://www.gov.uk/government/organisations/innovate-uk>

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, Wilts, SN2 1FL
3.2.	Buyer name	Bev Minton
3.3.	Buyer contact details	fmprocurement@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£40,000.00 Excluding VAT
3.5.	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.25. 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, unless formally advised to do so by UKSBS.

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Monday 30 th October 2023
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Monday 13th November 2023 11:00hrs GMT
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Wednesday 15th November 2023
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal (the Deadline)	Wednesday 22nd November 2023 11:00hrs GMT
3.10.	Anticipated notification date of successful and unsuccessful Bids	Wednesday 6 th December 2023
3.11.	Anticipated Contract Award date	Thursday 7 th December 2023
3.12.	Anticipated Contract Start date	Wednesday 3 rd January 2024
3.13.	Anticipated Contract End date	Sunday 31 st March 2024
3.14.	Bid Validity Period	90 Days

Section 4 – Specification

Background

EPSRC's Equality, diversity and inclusion (EDI) Action plan¹ sets out the activities that EPSRC will undertake to create a more inclusive research base that will produce the best results for UK research and innovation.

The action plan has been designed following consultation with our engineering, physical and mathematical sciences research and innovation community via university engagement, the EDI advisory group, and 'have your say' surveys which informed the reports Gender Diversity in our Portfolio: Survey Findings and Interventions² and Ethnicity and Race Inequity in our Portfolio³.

A theme that emerged from this engagement highlighted the need for EPSRC to demonstrate active leadership by increasing trust and visibility of our EDI activities.

Engagement with our engineering, physical and mathematical sciences research and innovation community suggested that creating additional roles on our peer review prioritisation and interview panels for individuals from the academic and business research and innovation community to specifically monitor the upholding of fair and transparent panel processes should be trialed to help build trust and visibility.

Similar roles have been appointed in the community, (for example the University of York's Department of Chemistry has used unconscious bias observers on their recruitment panels since 2015⁴). It is understood by our research and innovation community that an Observer, is a person who is not involved in the decision the panel makes, but are an active panel member who's role is to observe and challenge comments or questions from panel members which indicate a bias or are inappropriate. The aim of this is to raise the confidence and trust of applicants in the process and to ensure fair and objective decision making.

Our commitment to exploring how we can reduce bias in decision making by trialing these roles on our panels is covered by the below action in the EDI Action Plan:

- **Action 2.4:** Explore how we can reduce bias in our decision making. We will work with peer review prioritisation / interview panel members to ensure fair decision making. Working with our community and experts, we will design our panel process and roles to further strengthen the operation and transparency of our peer review panels to promote improved trust and confidence in our assessment and selection processes.

As part of this action, we will design and trial the role of **Panel Process Observers** in our peer review panels over the 2023-24 and 2024-25 financial years. The trial of this new role will be evaluated.

Scope of the Requirement:

As part of our commitment to exploring how we can reduce bias in our decision making as set out in the EPSRC EDI Action Plan, we will create the role of Panel Process Observer to strengthen the operation and transparency of our peer review panels.

¹ <https://www.ukri.org/wp-content/uploads/2022/12/EPSRC-091222-EPSRC3YearEDIActionPlan2022-2025.pdf>

² <https://www.ukri.org/wp-content/uploads/2022/05/EPSRC-110522-GenderDiversityInOurPortfolioSurveyFindingsAndInterventions.pdf>

³ https://www.ukri.org/wp-content/uploads/2022/11/21112022-EPSRC-Ethnicity-and-Race-Inequity-In-Our-Portfolio_Nov-2022.pdf

⁴ <https://www.york.ac.uk/chemistry/ed/gender-equality/>

The role of the Panel Process Observer will be held by a member of the EPSRC research and innovation community. They will meet the standard selection criteria required for panel members, and previous EPSRC panel expertise is preferable.

They will not be involved in the decision making that leads to the panel making a funding recommendation to EPSRC as a proposal introducer or interviewer.

The Panel Process Observer's role on the panel will be to support the other panel members in ensuring that the discussion of proposals and interviews are free from bias, and that the decision that is arrived at is in line with UKRI's Principles of Peer Review⁵. Specialist training will be provided to the Panel Process Observer to ensure that they are familiar with the EPSRC processes that they are monitoring and are equipped to intervene and challenge as necessary within their role.

The Panel Process Observer will be asked to sign the rank ordered list at the end of the panel to verify that they have observed the panel process and that their observations will be reported to EPSRC to feed into the evaluation of the panel process. They may provide additional feedback to EPSRC to inform the continual improvement of fair panel design and approach to peer review.

EPSRC will recruit around ten Panel Process Observers from the academic and business community to take part in this pilot. All aspects of the pilot will be evaluated ahead of a decision on whether this scheme will be rolled out further, and in what form.

This is an additional panel role. EPSRC staff, other panel members and the chair still have responsibilities to challenge each other and uphold fair and transparent decision making. Managing, challenging and eliminating bias remains the collective responsibility of all EPSRC peer review panels. The inclusion of this role provides an additional presence that can exclusively focus on these aspects of the panel. EPSRC staff that will be convening the panels that are part of the pilot will receive the same training as the panel process observers so that they have a full understanding of the observers' role and are able to effectively support them.

The Project

In designing this pilot, the importance of high quality and relevant training for the panel process observers has been identified as key to its success.

The aim of this tender process is to identify a supplier who can:

- Work with EPSRC to develop the role description of the panel process observer in line with the above outline and the process by which Panel Process Observers operate and are integrated into panel meetings.
- Develop and provide training to a cohort of around ten panel process observers and thirty EPSRC staff (panel convenors).

The training will need to be delivered ahead of the pilot beginning in April 2024.

Timeline and Milestones

January 2024	Project Initiation Meeting Virtual via Zoom	Payment 1: Sign off of PPO role description
	Finalisation of role and opportunity for supplier to observe panels. Meetings via Zoom.	

⁵ <https://www.ukri.org/councils/epsrc/guidance-for-applicants/what-happens-after-you-submit-your-proposal/principles-of-peer-review-assessment-and-decision-making/>

	Panels both virtually via Zoom and in person in Polaris House or other location.	
Jan-Feb 2024	Complete recruitment of observers by EPSRC and parallel development of training materials by supplier	
Feb 2024	EPSRC review training materials developed	Payment 2: Satisfactory production of training materials
March 2024	Delivery of training. In person with possibility of virtual follow up.	Payment 3: Delivery of training complete (Final payment)

This timeline may be extended by EPSRC in consideration of ongoing operational changes within UKRI. This will result in an extension to the contract by 1 month, which will not increase the budget value.

Progress meetings

The project will include:

- At least fortnightly (virtual- Zoom) update meetings for 1 hour at a time that works for all project members. These meetings will include discussion on progress of project deliverables.
- A contract midway point meeting: to include any issues to meeting the project deliverables
- A contract endpoint meeting to discuss completion of the project and discussion of lessons learnt and any next steps.

Payments

Payments will be linked to delivery of the key milestones as listed in the above table.

The Department aims to pay all correctly submitted invoices as soon as possible with a target of 10 days from the date of receipt and within 30 days at the latest in line with standard terms and conditions of contract.

Expenses

Travel and subsistence costs shall be included as part of AW5.2 Pricing Schedule however all bidders are to charge expenses in accordance with UKRI's business expense claims, business travel and subsistence policy provided in Annex 1. The Supplier will detail expenses as separate lines in each invoice for each event in line with [UKRI business expense claims, business travel and subsistence policy – UKRI](#)

Outputs

The output of this contract will be a cohort of trained Panel Process Observers who can identify and appropriately challenge any unfair and inappropriate feedback and address any bias on panels.

Outcomes

EPSRC will evaluate the project to understand how the creation of this role has impacted on our peer review processes in order to inform future actions in this area.

This evaluation will include:

- understanding the experiences of the panel process observers, other panel members, EPSRC staff involved in the trial, and applicants who attended panels as interviewees
- determining how effective the training was to allow the observers to carry out their role
- monitoring application and award rates

Aspects for the successful bidder to consider in their approach

EPSRC view the relationship as a partnership between ourselves, the supplier and the engineering, physical and mathematical sciences research and innovation community. Key requirements are the ability to bring robust and cutting-edge approaches to content delivery to an intellectual audience who are geographically dispersed.

Bidders should also be able to demonstrate the following within their proposals:

- Qualified Business Psychologists, with evidence of research activity as well as training delivery
- Expertise of designing and delivering inclusive and accessible training for a diverse group of learners
- Extensive expertise in designing and delivering live bias interventions to ensure fair and objective decision making.
- Expertise of working with intellectually rigorous and curious senior audiences.
- An ability to bring to life in a powerful and realistic manner, the impact of unconscious bias and unfair decision making in a research council context.
- An ability to gain the credibility and sponsorship of the academic community to endorse the training.
- An ability and proven track record to bring the training content to learners in a range of interventions, including online methodologies. The training may have been designed by the training provider or in collaboration with a creative partner.
- Proven track record of working with multiple stakeholders to deliver a product that meets a variety of needs.
- Understanding and expertise of handling issues relating to psychological security and safety that may arise when challenging peers.
- Provide detail on their expertise of working with academic audiences.
- The supplier should consider and detail whether the training will be carried out in person or virtually, with justification for the method chosen.

What can be provided to the successful bidder/inputs

The successful bidder will receive the current peer review panel briefing and training materials provided to panel members.

Panel member guidance can be found at [Panel member guidance – UKRI](#).

The successful bidder will observe a number of EPSRC panels to gain an understanding of the types of challenges that the panel process observer may encounter, to ensure that the training developed is fit for purpose and relevant to the research council context.

Other information

As this is a pilot run for a trial period, EPSRC will monitor and evaluate its effectiveness and in particular the cohort of Panel Process Observers will be asked to evaluate the training they received to inform future developments of the scheme.

Currently EPSRC panels are running both virtually and in person. The successful supplier should consider how the training can be delivered to allow the Panel Process Observer to effectively carry out their role in virtual, hybrid, and in person formats.

Types of panels/numbers

We will pilot this scheme from April 2024 with exact panel dates to be confirmed. It will cover approximately twenty panels, including prioritisation panels, fellowship interview panels and team interviews for large investments such as programme grants. We will recruit around 10 Panel Process Observers to take part in the pilot, and work with them in the evaluation of the programme to ensure any future role out incorporates learnings from the pilot.

The Panel Process Observer training will need to be complete ahead of these pilot panels.

What is not in scope?

Recruitment and promotion panels for EPSRC staff. This scheme is focused on panels that take place as part of the academic peer review process.

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 of Bids

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.

To maintain a high degree of rigour in the evaluation of your bid, a process of commercial moderation will be undertaken to ensure consistency by all evaluators.

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 ($5+5+6=16\div3=5.33$))

Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.2	Employment breaches/ Equality
Qualification	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Qualification	SEL1.10	Information security requirements
Qualification	SEL2.12	General Data Protection Regulations (GDPR) Act and Data Protection Act 2018
Qualification	FOI1.1	Freedom of Information
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.1	Validation check
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW3.2.1	Conflict of Interest Declaration Supporting Information
Qualification	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW4.3	Contracts with suppliers from Russia or Belarus
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Invitation to Quote response received on time within the Jaggaer eSourcing Portal

	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.	
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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.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	20%	20%
Technical	PROJ1.1	Approach and Methodology	80%	30%
Technical	PROJ1.1	Capability of staff to deliver		20%
Technical	PROJ1.3	Understanding the project environment and context		20%
Technical	PROJ1.4	Project Plan, Timescales and Risk Management		10%

Evaluation of criteria

Non-Commercial 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.
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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.

Commercial Elements will be evaluated 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 Commercial 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: $\text{Score/Total Points} \times 50$ ($80/100 \times 50 = 40$)

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

Section 6 – Evaluation Response Questionnaire

Bidders should note that the evaluation response questionnaire is located within the **Jaggaer eSourcing Portal**.

Guidance on how to register and use the Jaggaer eSourcing portal is available at

<https://beisgroup.ukp.app.jaggaer.com/>

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 Section 3 of 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 the eSourcing portal 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 Jaggaer 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.
- 7.10 Do complete all questions in the evaluation response 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 the Jaggaer eSourcing portal. 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 eSourcing portal and problems with functionality within the portal must be submitted to Jaggaer eSourcing Helpdesk

Phone 08000 698 632

Email customersupport@jaggaer.com

Please note; Jaggaer is a free self-registration portal. Bidders can complete the online registration at the following link:

<https://beisgroup.ukp.app.jaggaer.com/>

- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. 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 Response 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 / UK SBS.
- 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 Jaggaer 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 [modify duration if not 90 

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 Jaggaer 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 Jaggaer 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 revised its Government Security Classifications (GSC) classification scheme on the 2nd April 2014 to replace the previous 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

- 8.1 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 Contracting Authority.
- 8.2 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.
- 8.3 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 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.
- 8.5 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.

9.0 Timescales

- 9.1 [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.

10.0 The Contracting Authority's Contact Details

- 10.1 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 eSourcing tool to the designated UK SBS contact.

- 10.2 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the Jaggaer eSourcing portal. 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 Contract Notice
“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. NOTE: This document is often referred to as an Invitation to Tender within other organisations
“Mandatory”	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
“Named Procurement person ”	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
“Order”	means an order for served by any Contracting Body on the Supplier
“Supplier(s)”	means the organisation(s) awarded the Contract
“Supplies / Services / Works”	means any supplies/services and supplies or works set out at within <u>Section [4] Specification</u>

