

Invitation to Quote

Invitation to Quote (ITQ) on behalf of Advisory Conciliation and Arbitration Service (ACAS)

Subject: ACAS Data Rental List

Sourcing Reference Number: GSS23486

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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.ukpbs.co.uk/use/pages/privacy.aspx>

Privacy Notice

This notice sets out how the Contracting Authority will use your personal data, and your rights. It is made under Articles 13 and/or 14 of the UK General Data Protection Regulation (UK GDPR).

YOUR DATA

The Contracting Authority will process the following personal data:

Names and contact details of employees involved in preparing and submitting the bid;
Names and contact details of employees proposed to be involved in delivery of the contract;
Names, contact details, age, qualifications, and experience of employees whose CVs are submitted as part of the bid.

Purpose

The Contracting Authority are processing your personal data for the purposes of the tender exercise, or in the event of legal challenge to such tender exercise.

Legal basis of processing

The legal basis for processing your personal data is processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller, such as the exercise of a function of the Crown, a Minister of the Crown, or a government department; the exercise of a function conferred on a person by an enactment; the exercise of a function of either House of Parliament; or the administration of justice.

Recipients

Your personal data will be shared by us with other Government Departments or public authorities where necessary as part of the tender exercise. The Contracting Authority may share your data if required to do so by law, for example by court order or to prevent fraud or other crime.

Retention

All submissions in connection with this tender exercise will be retained for a period of (7) years from the date of contract expiry, unless the contract is entered into as a deed in which case it will be kept for a period of (12) years from the date of contract expiry.

Your Rights

You have the right to request information about how your personal data are processed, and to request a copy of that personal data.

You have the right to request that any inaccuracies in your personal data are rectified without delay.

You have the right to request that any incomplete personal data are completed, including by means of a supplementary statement.

You have the right to request that your personal data are erased if there is no longer a justification for them to be processed.

You have the right in certain circumstances (for example, where accuracy is contested) to request that the processing of your personal data is restricted.

You have the right to object to the processing of your personal data where it is processed for direct marketing purposes.

You have the right to object to the processing of your personal data.

International Transfers

As your personal data is stored on our IT infrastructure and shared with our data processors Microsoft and Amazon Web Services, it may be transferred and stored securely in the UK and European Economic Area. Where your personal data is stored outside the UK and EEA it will be subject to equivalent legal protection through the use of Model Contract Clauses

Complaints

If you consider that your personal data has been misused or mishandled, you may make a complaint to the Information Commissioner, who is an independent regulator. The Information Commissioner can be contacted at:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF
0303 123 1113
casework@ico.org.uk

Any complaint to the Information Commissioner is without prejudice to your right to seek redress through the courts.

Contact Details

The data controller for your personal data is:

The Advisory, Conciliation and Arbitration Service (ACAS)

You can contact the Data Protection Officer at:

Acas Data Protection Officer, The Advisory, Conciliation and Arbitration Service (ACAS), Acas National, 8th Floor Windsor House, 50 Victoria Street, London. SW1H 0TL, Email: dataprotection@acas.org.uk.

Section 2 – About the Contracting Authority

Advisory Conciliation and Arbitration Service (ACAS)

An independent body funded by the Department for Business Energy and Industrial Strategy (BEIS), Acas was established formally by statute in 1976.

Acas aims to improve organisations and working life through better employment relationships and through a range of services delivered with independence, impartiality and are confidential.

Acas provides dispute resolution service both in collective and individual disputes. Acas offers a collective conciliation service for dealing with disputes between groups of workers and their employers. Acas also deals with disputes where individuals claim their employer has breached their legal rights and Acas has a statutory duty to promote the resolution of claims which might result in an Employment Tribunal.

Acas provides expert advice and guidance on workplace rights and good practice through their website and helpline. They also offer training on a wide range of topics. Acas' team of advisers help organisations improve workplace relations and solve problems through tailored projects.

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	The Advisory, Conciliation and Arbitration Service (ACAS), Euston Tower, 286 Euston Rd, London, NW1 3DP
3.2.	Buyer name	Liz Vincent
3.3.	Buyer contact details	coreservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£50,000.00 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	Thursday, 22 June 2023 Contracts Finder
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Wednesday, 28 June 2023 14.00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Friday, 30 June 2023
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal (the Deadline)	Friday, 07 July 2023 14.00
3.10.	Anticipated notification date of successful and unsuccessful Bids	Tuesday, 01 August 2023
3.11.	Anticipated Contract Award date	Tuesday 01 August 2023
3.12.	Anticipated Contract Start date	Monday 14 August 2023
3.13.	Anticipated Contract End date	Tuesday 13 th August 2024
3.14.	Bid Validity Period	90 Days

Section 4 – Specification

Project background

A focus for Acas in recent years has been to increase the size of its owned and 'opted in' database by inviting new contacts to subscribe to ongoing Acas communications via a range of sources.

We register these new contacts through our own online subscription form. Upon completion, this form feeds new contact details (including names, job title, org address, phone and email) into our database.

We have been achieving approx 20,000 new subscribers into our database each year organically. We encourage people (for example) to subscribe to Acas communications through our website, via our elearning system and via contact cards we use at face to face meetings.

To date the Acas database has approximately **340,000** contacts, of whom around **178,000** are opted-in to receive ongoing email communications from Acas.

Each new subscriber is added to our central database where we manage records and process data for use in ongoing marketing campaigns.

An overview of key requirements for this project

- The supplier to procure contact details for potential customers / new contacts, who are not already on the Acas customer database, and to hold these in a suitable database outside of Acas systems. Use of new contacts will require de-duplication of available contacts from the list of Acas contacts we already hold. Acas will provide a list at the beginning of the project.
- The supplier will undertake the sending of emails to these contacts over a twelve month period. We estimate two emails per month but would be guided by supplier recommendations.
- Email will be clearly branded and meet Acas accessibility guidelines. The purpose of the emails will be to advertise Acas products and services and more specifically to encourage new contacts to agree to be added to Acas own subscriber list.
- Acas can provide content to assist in these promotions and a dedicated registration form only used in this campaign to help track results.
(<https://obs.acas.org.uk/Subscription/?FromOptIn=true>).
- The supplier is to liaise with Acas when producing email copy and Acas will approve/ sign off content prior to distribution.
- The supplier will provide reports on the outcomes of campaigns after each send.
- The supplier will ensure that any opt-in approaches and rented data use are compliant with relevant data privacy legislation and GDPR requirements.

1. Data rental – an overview of requirements

Acas requires the provider to source a rented contact list (of business contacts) which should be available for use for email marketing over a twelve month period. The list may be comprised of alternative sources but should in total include:

- Over 200,000 new contacts (B2B records) – this is an indicative estimate based on previous data sourcing for this project. There is no upper limit on the amount of contact data which can be sourced for this contract however we are looking for quality over quantity and for data provision to meet our needs in terms of achieving our target of a est. 20,000 new subscribers through this project. Bidders should justify the number of contacts they propose to make available in order to meet project aims and targets.

- We will require a de-duplication of new available contacts against existing Acas contacts at the outset of the project and would not pay for any contacts removed from lists acquired for the project as a result of deduplication at this stage.
- The data must align to our needs and should be described in detail at the tender submission stage. This description should include availability of data by region and a breakdown of job titles, and organisation sizes available.
- We require the provider to scope specialist list availability, eg for industry, small business or HR publication sources. See data requirements section below for further detail and examples.
- The majority of data should be available for organisations that have more than 5 employees. There is no upper limit on workplace size / employee count however we have a strong preference for SME audience contacts 5-249 employee size band.
- The supplier should provide a monthly review which tracks how the project is meeting targets. This will involve taking receipt of a list of newly opted in contacts coming into Acas databases via a dedicated subscription form designated only to use in this project (providing an identified contact data source within Acas databases) on a routine basis.
- The supplier should outline the availability of a secure FTP or data transfer process allowing Acas to pass over details of new contacts acquired in a secure manner.
- The supplier will be required to cleanse any bounced or unsubscribed data used on an ongoing / regular basis and to maintain history of 'do not contact' requests and to manage suppressions in a way that meets GDPR and other legislative requirements.

Data rental – Expanded detail of requirements

Contacts required

High priority:

Small and medium businesses are a key target for Acas within this project. We would like the supplier to outline the specific micro/small and medium business focus they will apply to list rental. In terms of org size we define micro/small to medium business as 2-249 employees We anticipate this will include:

Micro and small business 2-49 employees

- MD/CEOs/Owners of small businesses 2-49 employees.
- Contacts identified as having a finance, management or HR role in small businesses 5-49 employees.

Medium business focus (extending targets to include 50-249 employees to include:

- HR / personnel manager / Director / partner / adviser (senior HR)
- Other HR / personnel (eg HR assistant), payroll and benefits
- Manager / senior manager / line manager / supervisor
- Team leader
- Trade Union representatives
- Director
- Training / learning and development / skills (eg training manager, head of learning and development)

Large business focus (over 249 employees).

Note: please limit to 50 contacts for any one large organisation. Contacts to include:

- HR / personnel manager / Director / partner / adviser (senior HR)
- Other HR / personnel (eg HR assistant), payroll and benefits
- Manager / senior manager / line manager / supervisor
- Employment law specialists
- Team leader
- Trade Union representatives
- Director
- Training / learning and development / skills (eg training manager, head of learning and development)
- Academics / lecturers in employment law
- Equality and diversity leads

Note, we recognise that org size bandings may vary slightly by organisation, bidders are asked to outline the closest match they have available to the above.

Industry targets

Whilst we aim to help contacts across all industries we do have some target contacts we are particularly interested in reaching. We ask bidders to specify how many contacts within the overall pool of data being made available within this project fall under the following SIC classifications:

- Retail
- Construction
- Administrative and support services
- Accommodation and food
- Manufacturing
- Health and social work

Specialist list sourcing – some example publications.

Over and above any list sources used to obtain data for this project, Acas would also like the provider to investigate whether the publications, forums, list sources or membership bodies rent email contact lists to third parties which may meet our needs.

The supplier will manage sourcing, renting, acquiring and storing specialist lists. The supplier will run campaigns using the lists and provide detailed reports on outcomes. Any specialist list sourcing will be made in agreement with Acas.

Example specialist list sources – publications targeted at:

- **HR / personnel**
- **Training / learning / skills development**
- **Management / leadership**
- **Business leadership / Directors**
- **Small business**
- **Business networks / networking**
- **Employment law**
- **Industry magazines related to job title / industry targets**

Some examples:

- The Training Managers Contact Database – the Marketing Data Consultancy
- HR and talent Development Databank – Data ServiceWW inc

- Corporate contacts HR and training file
- Target response – HR prospects
- Data HQ
- Personnel Managers Handbook
- The Personnel Managers Yearbook Online
- Personnel Today magazine (Reed Business)
- People management daily
- HR reviewThe HR Director magazine
- Haymarket Direct
- Executive Grapevine
- CIPD / People Management Magazine
- XpertHR
- HRSpace
- HRIQ
- HRForum
- SHRM
- HRZone
- Accredited apprenticeship providers
- HR Magazine
- HR Nation (Wilmington)
- HR Today

Small Business / wider business

- Federation of Small Business (FSB) / First Voice Magazine
- CBI
- IOD – Institute of Directors
- CMI – Institute of Management
- Insider magazine
- Care in the community magazine
- Hotel and Catering magazine
- Chambers of commerce / BCC
- Insider top 500 (Newsco) – for each region
- Insider top SMEs – for each region
- Local Enterprise Partnerships
- Business Wales
- BUPA employee assistance
- Western Mail
- Melcrum publishing (internal comms)

Legal

- ELinfonet
- Employment law journal / legalease
- Law Gazette
- Legal week
- Legal news/jobs
- Legal cheek
- Legal business

Union contacts

- TUC

- Other Trade Union Representative lists – see:
<https://www.gov.uk/government/publications/public-list-of-active-trade-unions-official-list-and-schedule/trade-unions-the-current-list-and-schedule>

Management

- CMI
- Management today
- CBI

Data content

To be included in this project we anticipate rented data will need to include (for every record):

- Contact Name
- Job title
- E-mail address
- Org size (no of employees)
- SIC/Business classification
- Permissions for use
- List source

The supplier will manage sourcing, renting, acquiring and storing specialist lists. The supplier will run campaigns using the lists and provide detailed reports on outcomes. Any specialist list sourcing will be made in agreement with Acas.

2. Use of rented data, data refreshing and security

We recognise that the bidder will have arrangements with list sources / list owners and will need to negotiate exact terms which will meet Acas project aims and targets. We would envisage the following would be required:

- The supplier will need to sign a data sharing agreement which Acas will provide prior to receiving any contact data from Acas.
- Acas requires a data protection impact assessment to be undertaken prior to any work carried out. Acas has example forms that can be provided on request, these are based on DPIA guidance provided by ICO.
- The supplier should not keep personal data collected in this project for more than three months after the project ends.
- Terms of usage to be 'multiple' uses for e-mail sending over a 12 month project - a minimum of 30 uses of individual email records from March 2023 to end Feb 2024 (depending on start date of contact). Note: 30 instances of email use is an estimate, we would like bidders to specify how many uses of email records will be permitted.
- The supplier will need to provide assurance that any data rented which hard bounces within the first month of use will be credited or replaced with working / viable data.
- The supplier should manage all unsubscribe requests from the rented mailing / emailing list and the removal or flagging of any obsolete rented data / records.
- The supplier is to obtain and manage any ongoing usage permissions or agreements from any third party list sources.
- At the outset of the project the supplier should discuss with ACAS any potential project risks in the use and sharing of data and provide recommendations for mitigation.

3. Opt in and promotional requirements

The bidder is required to (but not necessarily limited to) do the following;

- Liaise with Acas comms and marketing leads and obtain permissions for copy sent to contacts on an ongoing basis.
- Provide named account managers working on the project.
- Check rented email lists against existing Acas lists of new subscribers to remove any contacts already opted-in. Acas will provide updates of new contacts acquired on a routine basis.
- Create and send opt-in emails to rented list contacts via the supplier's own email delivery system. The emails may also include topical content on employment relations updates / advice, which Acas will provide.
- Report all results of opt-in activity for each send / campaign in a summary report each month.
- Follow Acas branding and design guidelines as provided by Acas.
- Review campaign results to help inform projections of results and recommendations for further campaigns on an ongoing basis.
- Use unique URLs or email coding to track to measure the results of the opt-in campaign on an email engagement level.

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 ($5+5+6=16 \div 3 = 5.33$))

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	SEL1.11 SEL1.12 SEL1.13	System acquisition 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
Qualification	AW4.4	Non-disclosure Contract
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	Data rental	80%	30%
Technical	PROJ1.2	Opt-in promotions		20%
Technical	PROJ1.3	Specialist Lists		5%
Technical	PROJ1.4	Usage of rented data and data refreshing		20%
Technical	PROJ1.5	Risk Management		5%

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.
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: $\text{Score/Total Points multiplied by 50}$ $(80/100 \times 50 = 40)$

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 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 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 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 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>