

Invitation to Quote

Invitation to Quote (ITQ) on behalf of Innovate UK

Subject UK SBS The Provision of Marketing Automation Tool

UK Shared Business Services Ltd (UK SBS)

www.uksbs.co.uk

Registered in England and Wales as a limited company. Company Number 6330639.
Registered Office North Star House, North Star Avenue, Swindon, Wiltshire SN2 1FF
VAT registration GB618 3673 25
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UKSBS
Shared Business Services

Sourcing reference number UK SBS IT150012

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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 customers improve efficiency, generate savings and modernise.

It is our vision to become the leading provider for our customers 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 customers. This allows our customers 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 its customers, 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 Innovation and Skills (BIS) transition their procurement to UK SBS and Crown Commercial Service (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 Customers, our growth projections anticipate this will rise to £1bn in 2013/14.

Our Customers who have access to our services and Contracts are detailed [here](#).

Our achievements

In 2012/13 the Company grew in turnover from £44.7m to £52.4m, within that growth we:

- Reduced the Research Councils' 'back office' expenditure from £32m to £31.3m
- Saved £33m for the Research Councils in verified procurement savings, being greater than the entire cost of the services we provided to them
- Grew our customers from 7 to 22 (this will likely grow by a further 10 in 2013/14)
- Grew our customer base from 11,000 to 18,000 and will likely expand to 23,000+ in 2013/14

- Achieved an annual spend with SMEs that stands out across Central Government as a leading light at 32% (that's over £104.5M) against the 25% Government target

Our Procurement ambition

Our vision is to be recognised as a centre of excellence and deliver a broad range of procurement services across the public sector; to maintain and grow a procurement service unrivalled in public sector.

Procurement is a market-shaping function. Industry derived benchmarks indicate that UK SBS is already performing at or above “best in class” in at least three key measures (percentage savings, compliant spend, spend under management) and compare well against most other measures.

Over the next five years, it is the function's ambition to lead a cultural change in procurement in the public sector. The natural extension of category management is to bring about a fundamental change in the attitude to supplier relationship management.

Our philosophy sees the supplier as an asset to the business and the route to maximising value from supply. This is not a new concept in procurement generally, but it is not a philosophy which is widely employed in the public sector.

We are ideally positioned to “lead the charge” in the government's initiative to reform procurement in the public sector.

UK SBS Procurement's unique selling points are:

- Focus on the full procurement cycle
- Leaders in category management in common and specialised areas
- Expertise in the delivery of major commercial projects
- That we are leaders in procurement to support research
- Use of cutting edge technologies which are superior to those used generally used across the public sector.
- Use of market leading analytical tools to provide comprehensive Business Intelligence
- Active customer and supplier management

‘UK SBS’ contribution to the Government Procurement Agenda has been impressive. Through innovation and leadership UK SBS has built an attractive portfolio of procurement services from P2P to Strategy Category Management.’

John Collington

Former Government Chief Procurement Officer

Section 2 – About Our Customer

Innovate UK

The Innovate UK is the UK's innovation agency – driving innovation to boost economic growth. As well as investing in programmes and projects (£1bn investment budget 2008-2011), much of the board's work is in spreading knowledge, understanding policy, spotting opportunities and bringing people together to solve problems or make new advances. Innovate UK offer support and funding to help business develop new products and services - and bring them closer to market.

Innovate UK aim is simple – to accelerate economic growth by stimulating and supporting business-led innovation.

Success Stories

- A successful partnership with Strathclyde University has led to rapid growth at Glasgow business Clyde Space and the award of a contract by the UK Space Consortium for testing, construction and assembly of UKube-1, the UK's first CubeSat system.
- Start-up business Snap Fashion founded by 25-year-old computer science graduate has attracted £300k in private investment and launched an innovative search engine, website and iPhone app on the market after taking part in the 2011 Tech City Launchpad competition.
- With sustained support from Innovate UK, Fife company *PowerPhotonic* has perfected novel techniques for mass producing tiny lenses that get all the individual beams coming from a laser pointing in the right direction. High powered industrial lasers now have a sharper cutting edge thanks to lenses made in Scotland that focus their light into brighter beams - and the repercussions will be far-reaching.

Section 3 - Working with UK Shared Business Services Ltd.

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	Customer Name and address	Innovate UK Norrth Star House, North Star Avenue Swindon Wiltshire SN2 1JF
3.2	Buyer name	Katarzyna Nawrotek
3.3	Buyer contact details	Katarzyna.Nawrotek@uksbs.co.uk
3.4	Estimated value of the Opportunity	£0-£45,000.00
3.5	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available here. 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.

Section 3 - Timescales		
3.6	Date of Issue of Contract Advert and location of original Advert	03/03/2015 Contract Finder
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	09/03/2015 11.00am
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	11/03/2015 11.00am
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	13/03/2015 11.00 am
3.10	Date/time Bidders should be available if face to face clarifications are required	N/A
3.11	Anticipated rejection of unsuccessful Bids date	W/C 16/03/2015
3.12	Anticipated Award date	W/C 16/03/2015
3.13	Anticipated Contract Start date	TBC

3.14	Anticipated Contract End date	The initial contract is expected to be for 12 months, with an option to extend for 12 months, and an option to extend for a further 12 months.
3.15	Bid Validity Period	90 Days

Section 4 – Specification

Background

This request is to procure a marketing automation tool.

This tool will replace, or interface with, existing tools used by the Communications team, in particular the digital and events team members, and will enable us to improve efficiencies when compared to existing tools, and help us to achieve greater customer insight across our social, web, and email channels. This insight will allow us to better plan and deliver on our right message, right person strategy and therefore improve the way in which we serve our organisational strategic aims with some obvious key benefits:

- More time for the team to add value to their roles, rather than wasting time repeating processes or simply waiting for the tools to operate properly
- Improved understanding of how customers discover us and are nurtured through the customer journey across all digital channels
- The ability to plan, produce, control and publish content on web, social, and email channels ensuring consistent messaging
- Faster conversion to sign up – to hear from Innovate UK in general, for events & webinars, for competition application
- The ability to define channel ROI and allow us to attribute budget accordingly

Budget

£45,000

Mandatory Requirements

The tools we currently use are stand alone solutions that do not integrate and, as result, make it inefficient and complex for us to see a true picture of the customer.

Clarity on location of data may be important for data protection issues.

The require solution must deliver the following mandatory requirements:

User Interface

- Simple drag and drop tools, WYSIWYG editing

Email marketing

- Provides Enterprise level email marketing services (ESP push services , optimisation, reporting, MVT)

Other Channels

- Links to direct mail activity
- Links to events activity

Google Analytics integration

- Integration with Google Analytics

Data Integration

- Integrates with our forthcoming choice of CRM tool. Likely to be a recognised enterprise solution.
- Takes feeds from multiple other in-house or cloud data services.
- Events registration and attendance data.
- Exports data into third party tools

Content Management/publishing

- Import existing content
- Ability to create, edit, delete content
- WYSIWYG editing tools
- Edit on page
- Preview, test and live environments
- Manage multiple websites
- Editorial permissions
- Image resizing
- Assets management
- SEO friendly

Social Media Integration

- Integration with our Social Media tool, Hootsuite Enterprise.

Reporting/Analytics

- Aggregate reports, channel specific reporting, customisable reports
- Scoring of contacts.

Training

- Access to ongoing training
- Mon-Friday support

Other

- Multiple user access – we anticipate 4 users required
- Campaign landing pages
- Forms and data capture
- Paid search management

Service Level Agreement (SLA)

Incident Response\Resolution\Solution Times for the Support Plans:

Incident Priority	Incident Response Time	Incident Resolution Time	Permanent Solution Time
Priority Level 1	30 minutes	A resolution or workaround shall be made available within 4 hours.	A Permanent Solution shall be made available within 3 weeks via a patch, service pack or build
Priority Level 2	60 minutes	A resolution or workaround shall be made available	A Permanent Solution shall be made available

		within 8 hours.	within the next available patch, service pack or build
Priority Level 3	2 hours	A resolution or workaround shall be made available within 2 business days	A Permanent Solution shall be made within the next available patch, service pack or build
Priority Level 4	1 Day	A resolution or workaround shall be made available within 5 business days	A Permanent Solution shall be made within the next two available service packs or builds

Management of the Agreement

- A proposed approach to contract management will be agreed between parties as part of the strategic and operational governance of the agreement.
- Contract management requirements are largely designed to monitor the Potential Provider's delivery of their solution and maintain the specified performance levels e.g.
- Weekly performance reporting
- The reporting process (content, format and frequency of management information)
- Quarterly review and planning meetings

Contract Duration

The initial contract is expected to be for 12 months, with an option to extend for 12 months, and an option to extend for a further 12 months.

Section 5 – Evaluation model

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

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

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

After moderation the 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		
Questionnaire	Q No.	Question subject
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Contract Terms
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Data Protection

Scoring criteria

Evaluation Justification Statement

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

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	30%
Quality	AW6.3	Method Statement	30%
Quality	AW6.4	Account Management	15%
Quality	AW6.5	CRM	10%
Quality	AW6.6	Roadmap for Development	15%

Evaluation of criteria

Non-Price elements

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

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

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation: Score/Total Points available multiplied by 20 ($60/100 \times 20 = 12$)

Where an evaluation criterion is worth 10% then the 0-100 score achieved will be multiplied by 10.

Example if a Bidder scores 60 from the available 100 points this will equate to 6% by using the following calculation: Score/Total Points available multiplied by 10 ($60/100 \times 10 = 6$)

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 or	Very poor response and not wholly acceptable. Requires major revision to the

30	proposal to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40 or 50	Poor response only partially acceptable with deficiencies apparent. Some useful evidence provided but response falls well short of providing full confidence in the approach / solution described. Low probability of success.
60 or 70	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire. Good probability of success, weaknesses can be readily corrected.
80 or 90	Good response which describes in detail an approach / solution which provides high levels of assurance consistent with a quality provider. Great probability of success, no significant weaknesses noted.
100	Excellent response – comprehensive and useful, demonstrating a detailed understanding of the requirement. High probability of success, no weaknesses noted. The response includes a full description of techniques and measurements to be employed, providing full assurance consistent with a quality provider.

Please be aware that the final score returned may be different as there will be multiple evaluators and their individual scores after a moderation process will be averaged (mean) to determine your final score.

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 50

Evaluator 4 scored your bid as 50

Your final score will $(60+60+50+50) \div 4 = 55$

Price elements will be judged on the following criteria.

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

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

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

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

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

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

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

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

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

Section 6 – Evaluation questionnaire

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

Guidance on completion of the questionnaire is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

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

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions.
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission we may reject your Bid.
- 7.5 Do ensure you utilise the Emptoris messaging system to raise any clarifications to our ITQ. You should note that typically 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 your customer is and what they want – a generic answer does not necessarily meet every customer'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 and concise contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do check and recheck your Bid before dispatch.

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

DO NOT

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 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.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Customer to discuss your Bid. If your Bid requires clarification the Buyer will contact you.
- 7.16 Do not contact any UK SBS staff or Customer staff without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or Customer staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

Some additional guidance notes

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool may be submitted to Crown Commercial Service (previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of UK SBS.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 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
- 7.33 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.34 Bidders may only amend the Contract terms if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract and UK SBS fail to accept your legal or statutory reason is reasonably justified we may reject your Bid.
- 7.35 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.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.

- 7.38 Bidders should note that if they are successful with their proposal UK SBS 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 UK SBS may decline to proceed with the award of the Contract to the successful Bidder.
- 7.39 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 Emptoris.
- 7.40 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, UK SBS 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 UK SBS 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.

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

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

UK SBS 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

- [Emptoris Training Guide](#)
- [Emptoris e-sourcing tool](#)
- [Contracts Finder](#)
- [Tenders Electronic Daily](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

TEMPLATE VERSION CONTROL