Invitation to Quote

Invitation to Quote (ITQ) on behalf of UK Research and Innovation Economic and Social Research Council (ESRC)

Subject: Secretariat for All-Party Parliamentary Group for Social Science and Policy

Sourcing Reference Number: GSS23441

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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.

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- 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

Economic and Social Research Council (ESRC)

ESRC is the UK's largest funder of research on the social and economic questions facing us today. Their research shapes public policy and contributes to making the economy more competitive, as well as giving people a better understanding of 21st century society.

https://esrc.ukri.org/

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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	£90,000.00 Excluding VAT Based on a 3 Year Contract. Bidders are advised that there is an option for a break clause at the end of the initial 12 months of the contract.
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 will result in the Bid not being considered, unless formally advised to do so by UKSBS.**

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Tuesday 11th July 2023
3.7.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Tuesday 18th July 2023 11:00hrs GMT
3.8.	Latest date ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Thursday 20th July 2023
3.9.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal (**the Deadline**)	Thursday 27th July 2023 11:00hrs GMT
3.10.	Anticipated notification date of successful and unsuccessful Bids	Thursday 10th August 2023
3.11.	Anticipated Contract Award date	Friday 11th August 2023
3.12.	Anticipated Contract Start date	Monday 14th August 2023
3.13.	Anticipated Contract End date	Thursday 13th August 2026

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		Bidders are advised that there is an option for a break clause at the end of the initial 12 months of the contract
3.14.	Bid Validity Period	90 Days

Section 4 – Specification

Introduction

The Economic and Social Research Council (ESRC) sponsors the All-Party Parliamentary Group (APPG) for Social Science and Policy. Its remit is to bring together parliamentarians (MPs and members of the House of Lords), other senior policymakers and social scientists and by doing so demonstrate the relevance and value of social science research. In practical terms this predominantly involves running events at which social science researchers present to policymakers on a topic of current interest, followed by a Q&A.

The APPG has a secretariat to deliver its events and oversee its administration; this is overseen and funded by ESRC. ESRC is seeking a new supplier to act as secretariat.

Aims & Objectives

Aim of tender exercise: for ESRC to take on a new secretariat for the Social Science and Policy APPG.

We would like the new secretariat to begin work as soon as is realistically possible.

Specific outputs and expectations are as per sections below.

Overview of the Requirement

- ESRC sponsors the All-Party Parliamentary Group (APPG) for Social Science and Policy. Its remit is to bring together parliamentarians (MPs and members of the House of Lords), other senior policymakers, economists and social scientists and by doing so demonstrate the relevance and value of economic and social science research. Objectives include:
    - Ensuring connectivity between research and policy, and building durable relationships with parliamentarians in order to achieve this.
    - Ensuring that the latest research evidence can feed into policy decisions on relevant topics.
    - Demonstrating the value of social science research and of ESRC, as part of UKRI, to policymaking.
- In practical terms this predominantly involves running events at which social science researchers present to policymakers on a topic of current interest, followed by a Q&A. Topics cover a wide range of economic, constitutional, political, legal, behavioural and social matters. Examples of recent events can be found on the ESRC website.
- ESRC also supports collaboration with policymaking via a number of other channels, including our Actionable Insights Seminars for civil servants, What Works Centres, the Parliamentary Office of Science and Technology, our policy fellowships, Administrative Data Research UK (ADR UK), and support for institutions to run their own knowledge exchange initiatives between researchers and policymakers. We aim to ensure that our support for the APPG dovetails with these other channels, rather than competing with or replicating them.
- The APPG has officers, who are MPs and Peers, including a Chair, who is always an MP.
    - The APPG Chair is the key contact in Parliament for the APPG
    - The APPG Chair chairs APPG events (unless unavailable)

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- o At the time of writing, the role of Chair for the Social Science and Policy APPG is held jointly by two MPs as Co-Chairs
- The APPG has a secretariat to deliver its events and oversee its administration; this is overseen and funded by ESRC.
- ESRC is seeking a new supplier to act as secretariat.
- We are keen that our new supplier can offer a strong focus on testing / trialling / evaluating new formats, building on the APPG's success, to generate interest, and help us to increase the number of parliamentarians attending events from its current base.

Skills and knowledge required

- Expertise of parliamentary event planning and delivery of in-person and hybrid formats, ideally for events relating to APPGs
- Focus on helping clients achieve goals; proactive in identifying ways to achieve this and in monitoring and evaluating success
- Able to supply staff with strong communication skills, including written communication; proactive in keeping clients up to date, flagging issues in a timely manner and suggesting solutions
- Understanding of senior policymakers and their needs; ability to tailor communication appropriately for them and to brief event speakers on how to do so
- Good interpersonal and problem-solving skills; ability to think on feet
- Awareness of how Parliament works, the UK political landscape, the interests of Parliamentarians and current affairs
- Comfortable with change
- Comfortable with technology, both for on-the-day event delivery and communicating effectively with target audiences about events and monitoring the effectiveness of this. Expertise highly desirable in:
  - o setting up and running audio-visual equipment, using video-conferencing platforms in hybrid settings
  - o applying email marketing best practice, for example understanding how wordings and timings affect response and tracking email response (eg open and click-through rates) via email tracking/automation tools (eg Mailchimp).

Summary of secretariat duties

- Deliver APPG events and related communications. See 'Event requirements' section below for further details.
- Maintain, build and keep updated a database of contact details of appropriate target attendees.
- Ensure that personal data is processed in accordance with the UK GDPR, using the APPG advice note on APPGs and data protection to assist with this.
- Have an appropriate level of IT security in place, for example in line with Cloud Security Principles
- Ensure that the APPG advice note on security at APPG events is complied with.
- Liaise regularly with ESRC, keeping them informed of developments and ensuring that their requests and requirements are acted upon. Reply to emails from ESRC within 5 working days.
- Act as main point of contact with APPG officers (predominantly our Co-Chairs) on day-to-day matters

- Undertake admin tasks to ensure that APPG is run in line with [rules on All-Party Parliamentary Groups](#) and remains on the register of [All-Party Parliamentary Groups](#)
- Monitor and report on attendance by key audience groups at events, within 1 working day of the event.
- Contribute to decisions, in collaboration with ESRC, on appropriate APPG event topics, speakers and timings, drawing on awareness of current affairs, the UK political landscape and the popularity of previous APPG event topics.
- Summarise Parliamentarian interests for ESRC, to contribute to APPG topics and speakers as above, but also to support ESRC in ensuring its research investments are relevant for policy makers longer term.
- Proactively suggest improvements to ESRC to help increase attendance and broader interest in the APPG among parliamentarians, particularly newer generations of MPs, increase the impact of the APPG, evaluate its success and ensure a pipeline of parliamentarians interested in becoming APPG officers.
- Be open to exploring and potentially forming formal or informal partnerships/collaborations with other organisations, bodies or groups, for example other APPGs, [the Parliamentary Office of Science and Technology (POST)](#).

Supporting ESRC to increase APPG success

- Be flexible and open to changes/new initiatives from ESRC aimed at increasing the success of the APPG; take forward subsequent actions where relevant.
  - This may include, but isn't limited to:
    - changing the type/format of events we run
    - tracking responses to communications (eg email open and click-through rates)
    - working to increase the percentage of those who register to attend that turn up on the day (eg via calendar invites, reminders)
    - sharing related content via APPG channels
    - cross-promoting other ESRC events/opportunities.
- Proactively suggest improvements to ESRC to overcome challenges associated with the APPG and increase its success and impact; where these are accepted by ESRC, drive forward subsequent actions.
- Challenges include:
  - Increasing attendance among parliamentarians (members of the House of Commons and House of Lords).
  - How to increase the impact of the APPG
  - How best to measure the success of the APPG and to monitor this.

Event requirements

Number of events
- Deliver **up to ten** events each calendar year, plus an AGM:
  - Deliver **Up to six** standard APPG events.
    - Our standard events typically involve multiple speakers talking on a selected topic, with the topic varying from event to event, depending on what is relevant to Parliament at any given point.
    - Parliamentarians from all parties, their staff and other policymakers are invited.

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- o If relevant, **one** APPG event analysing general election and/or local election results.
  - This is typically a single-speaker event to which parliamentarians from all parties, their staff and other policymakers are invited.
- o **Up to three** 'budget briefing' events (one per party), held shortly before the UK government's annual budget statement and spending review.
  - Events held separately for the Conservative Party, the Labour Party and other parties.
- o An AGM, held in line with current requirements for APPG AGMs.

Event format and duration

- The formal part of Social Science and Policy APPG events lasts one hour, structured as follows:
  - o Welcome/introductions from the Chair and ESRC. ESRC provides a senior member of staff to summarise ESRC's connection to the topic in hand and introduce the speakers.
  - o Presentations by expert speakers.
  - o Q&A.
- Secretariat to run a short briefing session for Chair, ESRC rep and expert speakers before the talks begin to ensure responsibilities and the order of events is clear, answer any questions and ensure it is clear how to use any relevant technologies.
- Events to be delivered in **hybrid format**, with attendees given the choice of attending in person in the Houses of Parliament or virtually.
  - o Look into the logistics of running hybrid events from Houses of Parliament and advise ESRC as to the best way forward.
  - o Ensure that both groups of attendees have a positive experience and feel included and able to engage.
  - o Secretariat duties to include that appropriate technology is in place to allow for a successful hybrid event, providing the necessary staff and equipment required, troubleshoot any issues and ensure that speakers, Chair, ESRC rep and attendees know how to use the relevant technology to participate in the event.
- For those attending the events in person, we would like to offer the opportunity for informal networking over light refreshments before and/or after each event.
  - o We anticipate that this may add up to 30 minutes to the duration of the event in practice.
  - o Secretariat duties to include organising the catering and ensuring that that room booking arrangements allow for this.
- AGM must be held in person, unless current requirements change.
- AGM duration can be short; around 15 minutes is typical.

Event timing

- Timescales and dates for all events to be agreed with ESRC and with the APPG's Co-Chairs.
- All events to be scheduled for a date and time that maximise likelihood of good attendance by parliamentarians.
  - o Events to be scheduled for dates when parliament is sitting and to avoid periods of recess and pre-election periods.

- o Events to be scheduled for times that minimise conflict with parliamentarians' other activities.
- One to two standard APPG events to be held in each of the three main periods between typical annual parliamentary recesses (Christmas–Easter, Easter–summer, summer–Christmas).
- Election results event (if run) to be held shortly after the relevant election(s) – ideally within four weeks.
- Budget briefing events to be held in run-up to budget statements – ideally within the preceding two weeks.

Event delivery requirements

General
- Consider for each individual event any appropriate steps to maximise attendance by parliamentarians (in addition to top-level consideration of how to increase attendance by parliamentarians across the events series as a whole).
    - o Seek approval from ESRC, and the APPG Chair if relevant, and action if approved.
    - o As an example, this could include running a joint event with another APPG with an interest in the relevant topic.
- Follow agreed process and timetable to plan and deliver events, ensuring all steps and deadlines are met.
    - o ESRC will supply process and timetable for 'top-level' decision making around events, including topics, speakers and approximate timings, including which stakeholder groups are consulted and/or approve decisions at each stage.
- Keep in regular communication with ESRC lead
    - o Ensure any potential issues are flagged as soon as they arise.
    - o Respond in a timely fashion to communications from ESRC lead.
- Communicate with APPG officers (predominantly our Co-Chairs) as appropriate via their respective offices.
- Stay aware of current affairs and political changes that might affect event decisions and/or planning and flag to ESRC, making recommendations if appropriate.

Feeding into decisions on event topics, speakers and dates

- Feed into process of identifying and agreeing event topics, speakers and dates as appropriate, drawing on awareness of current affairs and the political landscape
    - o Includes identifying an appropriate approximate date range for each event topic agreed at an early stage of planning.
- Support ESRC in ensuring that speakers selected are appropriate to present to senior policymakers, specifically that they are strong public speakers, able to present in a concise, non-academic, unbiased manner.

Detailed Event planning

- Contact selected speakers to scope availability and invite them to participate, keeping ESRC updated re acceptances. Ideally 4 weeks ahead of the planned event.
- Identify a specific, appropriate time and date which works for ESRC, Co-Chairs and speakers, and for which a room is available in the Houses of Parliament. Seek approval of date from ESRC.

- Book room, tech support for in-person and virtual delivery and refreshments.
- Brief speakers in line with ESRC requirements.
- Draft invitation and seek approval from ESRC and send to target attendees, including all parliamentarians, via appropriate communication mediums and channels.
    - Ensure draft invitation has been proofread and is error-free before submission to ESRC for approval, is appropriate for the target audience and provides compelling reasons to attend and clear information on how to register.
    - Ensure up-to-date contact details are used for all recipients.
    - Ensure that communication methods used to send invite and its timing are selected to maximise likelihood of invitation being noticed and accepted, particularly by parliamentarians. Apply email marketing best practice as appropriate.
    - Invites to be received by potential attendees four weeks before the event.
    - Keep track of responses. Consider follow-up messages where appropriate.
    - Consider other routes for promoting the event to target groups if appropriate.
- Gather presentation summary from each speaker; compile post-event summary of key points for attendees within 2 working day.
- Ensure speakers supply their slides in advance of the meeting (if used).

On-the-day tasks

- Attend event in-person to ensure its smooth running and solve any problems.
- Ensure room and seating are laid out in an appropriate fashion, refreshments are in place and that relevant tech is up and running in good time.
- Welcome and brief speakers, chair(s) and ESRC representative and answer any last-minute questions before event begins.
- Record who attends, and areas of interest from attendees arising in Q&A.

Post-event tasks

- Within two days of the event send out speakers' PowerPoint slides to attendees, along with post-event summary and any additional materials if requested by ESRC/UKRI. Ensure that ESRC also receives these.
    - Potentially, apply tracking to monitor and report on engagement levels with these materials.
- Within two days of the event supply to ESRC:
    - a concise event summary to ESRC, including numbers of attendees by category and any key areas of interest arising from Q&A.
    - a list of all attendees, their job title and organisation.
    - Data on post-event engagement activites
- Keep ongoing record of numbers of attendees for each event by category.

<u>Environmental factors</u>

Potential suppliers should be aware that there are restrictions on access and deliveries to the Houses of Parliament, which they will need to factor into event planning. [Guide to the rules on All-Party Parliamentary Groups (APPG)](#)

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Timetable

As per 'Event requirements' section, above, events to be delivered on a regular, ongoing basis on appropriate, mutually agreed dates. We envisage the successful supplier will invoice us per event delivered, after the relevant event and post-event tasks have been delivered.

AGM timing to comply with requirements set out in APPG Advice note 3: organising an annual general meeting (AGM).

Broader responsibilities (as per 'Summary of secretariat duties') such as proactively suggesting improvements to be delivered on an ongoing basis. We would expect to receive some initial ideas within the initial one-year trial period.

Reporting

ESRC will require the supplier to:

- Keep on going record of APPG event topics, date of event, attendance total, attendance by category over time in order to monitor attendance and interest by group, to be saved in a in a shared location for supplier and ESRC to refer to when planning topics.
- Reporting at quarterly meetings with ESRC to discuss data collected above, the forward plan for events, update on progress for forthcoming events, and any further recommendations.
- Within two days of each event the supplier will send ESRC a concise event summary, including numbers of attendees by category and any key areas of interest arising from Q&A. A list of all attendees, their job title and organisation and any other points to note. As well as data on post-event engagement activites.
- A list of recommendations on how to improve APPG event delivery within the first year of the contract.

KPI's

ESRC will require the supplier to:

- Reply to emails from ESRC within 5 working days.
- Maintain a level of attendance to 10 parlimentarians per event on average over a rolling 12 month period.
- Follow the timing detailed within the event planning process.
- Send event invites 4 weeks in advance of the event.
- Ensure that external communications content sent to approval to ESRC is error free and factually accurate.

Length of contract

Three-year contract, with a break clause at the end of the initial 12 month contract period.

Bidders are advised that there is an option for a break clause at the end of the initial 12 months of the contract and that the contracting Authority reserves the right to conclude the contract after this initial call off period. Where the break clause is initiated ESRC will give the supplier 30 days written notice.

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<u>Payment Terms</u>

The supplier will invoice UKRI following each event delivered, after the relevant event and post-event tasks have been delivered.

Payment shall be made via BACS, upon receipt of valid invoice and purchase order.

<u>Expenses</u>

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 <u>UKRI business expense claims, business travel and subsistence policy – UKRI</u>

<u>Terms and Conditions</u>

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

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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÷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	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.	

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	25%	25%
Technical	PROJ1.1	Approach and Methodology		25%
Technical	PROJ1.2	Team and Capability	75%	25%
Technical	PROJ1.3	Project Plan and Timescales		25%

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:
Score = {weighting percentage} x {bidder's score} = 20% x 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) ÷ 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: Score/Total Points multiplied by 50 (80/100 x 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	- 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	- 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	Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	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)	- 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	- the Contracting Authority may request the following requirements at any stage of the Procurement: - 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	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

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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.

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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.

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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

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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 <u>not under any circumstances</u> 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

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