

Invitation to Quote

**Invitation to Quote (ITQ) on behalf of the Department for Business,
Energy and Industrial Strategy (BEIS)**

**Subject UK SBS PS16280 Costing Value Add of the Business
Support Helpline**

Sourcing reference number PS16280

UK Shared Business Services Ltd (UK SBS)
www.uksbs.co.uk

Registered in England and Wales as a limited company. Company Number 6330639.
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UKSBS

Shared Business Services

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Section 1 – About UK Shared Business Services

Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our 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 (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 Customers.

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

Section 2 – About Our Customer

Department for Business, Energy & Industrial Strategy (BEIS)

The Department for Business, Innovation & Skills (BEIS) is the department for economic growth. The department invests in skills and education to promote trade, boost innovation and help people to start and grow a business. BEIS also protects consumers and reduces the impact of regulation.

BEIS is a ministerial department, supported by 47 agencies and public bodies.

Our priorities for 2016 to 2017 include:

- business and enterprise
- competitiveness and exports
- science and innovation
- apprenticeships and skills
- higher education
- labour markets

We have around 2,500 staff working for BEIS plus around 500 people working for UK Trade & Investment in the UK.

Our partner organisations include 9 executive agencies employing around 14,500 staff.

We have BEIS offices in London, Sheffield, Billingham, Cardiff, Darlington, Glasgow, Manchester, Nottingham, Runcorn and Watford.

Department for Business, Energy & Industrial Strategy achievements include:

- Funding 457,000 apprenticeship starts in 2010-11 Academic Year
- Committing £75 million to support innovation in technology-based SMEs
- Helping 25,000 UK businesses (mainly SMEs), employing over 13 million people, to make the most of opportunities for growth in overseas markets; Growth Accelerator is a new Department for Business funded-service to help up to 26,000 small and medium enterprises (SMEs) grow as much as they can over three years. Working with an experienced coach, businesses will receive a personalised growth plan, training and workshops, networking and peer to peer support. SMEs can also learn how to develop their leadership and management capability.
- With the Cabinet Office, leading the review of 1,200 regulations across Government as part of the Red Tape Challenge, more than half of which will be scrapped or improved.

<http://www.beis.gov.uk>

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	Department for Business, Energy and Industrial Strategy, 1 Victoria Street, London, SW1H 0ET
3.2	Buyer name	Ben Osborne
3.3	Buyer contact details	Professionalservices@uksbs.co.uk
3.4	Estimated value of the Opportunity	Maximum contract value shall not exceed £18,000.00 excluding VAT
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	13/01/2017 Contracts Finder
3.7	Latest date/time ITQ clarification questions should be received through Emptoris messaging system	19/01/2017 11:00am
3.8	Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris	20/01/2017 14:00pm
3.9	Latest date/time ITQ Bid shall be submitted through Emptoris	27/01/2017 11:00am
3.10	Date Bidders should be available if face to face or telephone clarifications are required	1 st , 2 nd and 3 rd February 2017
3.11	Anticipated rejection of unsuccessful Bids date	08/02/2017
3.12	Anticipated Award date	08/02/2017
3.13	Anticipated Contract Start date	13/02/2017

3.14	Anticipated Contract End date	31/03/2017
3.15	Bid Validity Period	60 Days

Section 4 – Specification

Background

The Department for Business, Energy and Industrial Strategy (BEIS) is the department for economic growth. The department brings together responsibilities for business, industrial strategy, science, innovation, energy, and climate change. The Department provides support to help people to start and grow a business.

The Business Support Helpline is a key element of the Government's business support ecosystem along with GOV.UK and local growth hubs. It is a two tier, national service, providing signposting, diagnostic support and business improvement advice to pre-starts, start-ups, and existing businesses to help them start and grow.

The service has developed over time to provide both national information, which all businesses require, plus advice and signposting to local growth hubs for additional help so ensuring there is 'no wrong door' to government help. For businesses that require additional support e.g. they show potential to grow, or they have significant business challenges, the Helpline offers a Tier 2 call back phone appointment for one hour of free 1-2-1 advice.

The service can be accessed by telephone, web chat, e-mail or social media (Twitter, Facebook and You Tube) and is promoted on GOV.UK alongside a number of partner websites and growth hubs. The Helpline has been voted the 'No1 Business Support Expert to follow on Twitter' and gets 1.5 million Twitter impressions per month.

The Helpline is also used as the national emergency response service for businesses in times of crisis e.g. flooding.

The Helpline syndicates its phone, digital and knowledge services to government partners, predominantly local growth hubs. There are currently 39 hubs in England with a variety of operating models and target audiences. Their use of the Helpline's services is mixed. Some use the Helpline to fulfil all their advice requirements e.g. the virtual hubs in London and the North East. Others just use the Tier 1 service, web chat or knowledge services, or for specific business segments e.g. start-ups or businesses in crisis. All hubs receive a monthly report from the Helpline profiling callers in their catchment area and the reasons for contacting an advisor.

The Helpline is always looking for ways to improve its services and is exploring a personalisation pilot with a hub looking at how online signed-in user accounts may be used to provide bespoke services and improved customer experience for businesses.

Scope of the Requirement

The Department is commissioning a project to put a monetary value on the services delivered by the Helpline for growth hubs and other partners over and above the core national Helpline service to ascertain the cost of the value add for Government.

Working closely with the Department, the project is to be carried out by suitably experienced and qualified personnel who shall be required to undertake the following task:

To establish a monetary value for each of the services delivered by the Helpline for growth hubs and other partners over and above the core national Helpline service to ascertain the cost of the value add for Government. A list of the Helpline's value adding services for hubs, partners and Government is at Annex A.

Proposals should include an outline of the methodology that will be used to ascertain the value adding benefits of the Helpline for growth hubs and partners. We are looking to cost the current 'as is' scenario i.e. with the mixed model of Helpline use by hubs across all channels and services. We will be able arrange interviews with the Helpline Service and Contract Managers in BEIS, plus some hubs to inform the work.

The budget of the national Helpline service will be provided and can be used to benchmark unit costs e.g. the annual cost of a Tier 1, or a Knowledge Manager.

Deliverables

In order to achieve the above requirements and desired outcome(s), it is anticipated that:

- a) Working in liaison with the Department, the successful contractor will prepare a project delivery plan for approval by the Department.
- b) The contractor will prepare a copy of any questionnaire to be used to collect data or information from partner organisations for agreement by the Department.
- c) The Contractor will provide the Department with a draft Report of the findings on the monetary value of the services including an executive summary, a list of partner organisation contacted and a final report (format to be agreed with the Department).
- d) Upon request, to support the Department in presenting feedback of the report findings within the Department or to Partner organisations.

Timeline

The work needs to complete before 31st March 2017.

Non-Disclosure Agreement

The Contractor appointed to undertake the work will be required to enter into a Non-Disclosure Agreement with BEIS and any other such confidentiality arrangements with other parties within the Business Support Helpline, as necessary to satisfactorily complete the work. A copy of the NDA is attached to this procurement.

Annex A: Helpline services provided for national and local partners

GOV.UK content

- The Helpline supports GOV.UK improvement by feeding information callers say they can't find on GOV.UK to GDS via monthly Ops Reports, so leading to content improvement and better user journeys
- GOV.UK content is 'white labelled' then by hubs (i.e. branded as their own content) and used by hub advisors to ensure accuracy and consistency of government support

Business Finance and Support Finder Tool

- The Helpline Knowledge Managers help keep the content of the Business Finance and Support Finder Tool (BFSF) on GOV.UK accurate and up-to-date by informing GDS of new, and changing, business support schemes. The tool is syndicated to a range of partners via an API to provide accuracy and consistency of government support

National Partners

- The Helpline acts as the business support service for a number of national partners, providing information on their support offer e.g. Enterprise Zones, Start-up Loans, National Careers Service. This stops them setting up duplicate services, provides economies of scale for Government and ensures accuracy and consistency. The Helpline advisors also provide general business support advice for HMRC webinars.

Local Growth Hubs

- The Helpline provides phone advice services for a number of local growth hubs. In some areas e.g. the virtual hubs in London and the North East this is a full Tier 1 and 2 advice service. In other areas it could just be Tier 1, start-up advice or help for businesses in crisis. A spreadsheet of which hubs use which services is available for the successful bidder
- It provides web chat services for some hubs
- The Helpline's Knowledge Bank is available for use by growth hub advisors, so ensuring accuracy and consistency across government business support via a single source of information that is updated daily
- The Helpline provides monthly reporting for hubs on the profile of callers and topics discussed in each hub region to inform hub service delivery. This live, real-time data can be accessed remotely via the Helpline's Qlikview software

BEIS and Government

- The Helpline provides ad hoc Management Information for BEIS and wider Government to inform policy making e.g. it provided a review of business support schemes in England per LEP and Local Authority using the Knowledge Bank. The Helpline is uniquely placed to this as a national government service interacting with small businesses
- It has the ability to run polls and surveys via social media with businesses
- The Helpline's social media channels are used to boost government comms campaigns e.g. it has supported the GREAT campaign and Small Business Saturday, so helping reduce the cost of comms budgets. Its large Twitter reach is an asset to Government
- There is the potential to use aggregated Helpline data as part of the Government's Open Data Strategy to inform development of innovative solutions to public sector problems.

Section 5 – Evaluation model

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

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

The evaluation team may comprise staff from UK SBS, the Customer and any specific external stakeholders UK SBS deem required. After evaluation 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 ($5+5+6 = 16 \div 3 = 5.33$))

Pass / fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
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	Acceptance of non disclosure agreement

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	20%
Quality	PROJ1.1	Approach	40%
Quality	PROJ1.2	Understanding the Environment	20%
Quality	PROJ1.3	Project Plan and Timescales	10%
Quality	PROJ1.4	Project Team	10%

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	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 selection 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 the final score returned may be different as there may be multiple evaluators and their individual scores 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 40

Evaluator 4 scored your bid as 40

Your final score will $(60+60+40+40) \div 4 = 50$

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.ukpbs.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 60 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](#)