



# Invitation to Quote

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

**Subject: ACE Projects Training**

**Sourcing Reference Number: CS21009**

**UK Shared Business Services Ltd (UK SBS)**  
[www.uksbs.co.uk](http://www.uksbs.co.uk)

Registered in England and Wales as a limited company. Company Number 6330639.  
Registered Office Polaris House, North Star Avenue, Swindon, Wiltshire SN2 1FF  
VAT registration GB618 3673 25  
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Version 4.0

**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 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.

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business, Energy and Industrial Strategy (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Contracting Authorities. Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

## **Privacy Statement**

At UK Shared Business Services (UK SBS) we recognise and understand that your privacy is extremely important, and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UK SBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.
- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

<https://www.uksbs.co.uk/use/pages/privacy.aspx>

For details on how the Contracting Authority protect and process your personal data please follow the link below:

<https://www.ukri.org/privacy-notice/>

## Section 2 – About the Contracting Authority

### UK Research and Innovation

Operating across the whole of the UK and with a combined budget of more than £6 billion, UK Research and Innovation represents the largest reform of the research and innovation funding landscape in the last 50 years.

As an independent non-departmental public body UK Research and Innovation brings together the seven Research Councils (AHRC, BBSRC, EPSRC, ESRC, MRC, NERC, STFC) plus Innovate UK and a new organisation, Research England.

UK Research and Innovation ensures the UK maintains its world-leading position in research and innovation. This is done by creating the best environment for research and innovation to flourish.

For more information, please visit: [www.ukri.org](http://www.ukri.org)

### Innovate UK

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

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

## Section 3 - Working with the Contracting Authority.

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	UK Research and Innovation, Polaris House, North Star Avenue, Swindon, SN2 1FL
3.2.	Buyer name	Chris Grant
3.3.	Buyer contact details	Professionalservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£230,000.00 excluding VAT
3.5.	Sourcing Route	This requirement is being advertised via Contracts Finder as a below-threshold requirement under the Light Touch Regime applicable to Education and Training Services (CPV code 80000000) as prescribed by Section 7 and Schedule 3 of the Public Contract Regulations 2015.
3.6.	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available <a href="#">here</a>. 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.</b>

Section 3 - Timescales		
3.7.	Date of Issue of Contract Advert on Contracts Finder	Thursday, 04 February 2021
3.8.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Tuesday, 09 February 2021 14.00
3.9.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Thursday, 11 February 2021
3.10.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Thursday, 18 February 2021 14.00
3.11.	Date/time Bidders should be available if clarifications are required	Monday, 22 February 2021
3.12.	Anticipated notification date of successful and unsuccessful Bids	Friday, 26 February 2021
3.13.	Anticipated Contract Award date	Friday, 26 February 2021
3.14.	Anticipated Contract Start date	Wednesday, 03 March 2021
3.15.	Anticipated Contract End date	Monday, 01 November 2021

3.16.	Bid Validity Period	60 Days
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## Section 4 – Specification

### Introduction

UK Research and Innovation (UKRI) Innovate UK are a government funded organisation that connects businesses to the partners, customers and investors that can help them turn ideas into commercially successful products and services. They fund business and research collaborations to accelerate innovation and drive business investment into research and development.

The ACE projects are a set of small to medium projects to improve internal and external customer service and ensure the systems, processes and people skills within InnovateUK allow an easier, clearer, more supportive and efficient end to end funding process.

### Aims

The main aim of this tender is to procure an external training company to develop and deliver training on each of the project packages to the employees and selected external delivery partners. UKRI require a training company that can create highly engaging content and deliver excellent training across the ACE projects to ensure the changes are landed successfully. The training is across many project packages and a short time frame to large audiences.

### Objectives

Each training course needs to have clear objectives to ensure the end user is embedded with the correct knowledge, skills and behaviours to perform and own their role and understand how it impacts others.

Real scenarios and screenshots need to be included to ensure it is brought to life and is accessible and relatable.

The successful supplier will need to be able to utilise internal process flows and standard operating procedures to develop the content and talk confidently about the project.

The projects are varied across processes, systems and audience and the successful supplier must be adaptable at understanding the systems and processes to be able to develop training that is required.

In terms of delivery this needs to be across a wide range of methods. These include Seminar led training courses (currently proposed virtually via Videoconference (Zoom) but open to alternatives), videos of mini system tutorials that replicate the user completing a task, recorded videos, engaging written content, system user guides, awareness guides of key changes and frequently asked questions.

The successful supplier will need to record attendance and create and share the results of evaluation forms with the training lead to ensure the training has embedded.

As some of the projects may launch at the same time, the successful supplier must have the correct level of staffing to be able to run parallel training sessions if the training schedule requires it. The successful supplier will need to be adaptable to changes in



solution that may come up as the training content is written and be aware that timelines as project launches may move.

### **Scope**

Please see the list below, please note this list is not exhaustive and may be added to as the training is developed:

- Course specific Training Content in a PowerPoint/ Word document that can be used for training and saved for future reference - This will include processes, system walkthroughs /screenshots and ways of working and behavioural skills
- All trained needs to be recorded
- Bite Size Videos (system tutorials) inserted into training
- Where required longer videos may be required to train larger audiences followed by a Q&A Session
- System User Guides produced as required
- Awareness Guides
- Deliver Training Remotely (Should this change to face to face UKRI will arrange the invites, space and equipment)
- Capture questions in training (List of questions to readdress with the Project team)
- Evaluate Training- be able to judge if the training has embedded
- FAQ's - Easy assessable document that can build upon training delivered
- Capture Attendance
- The training approach and schedule will be worked on and agreed with the Training Lead within Innovate UK

Not included in Scope:

- List of end users by function and course will be collated provided by the Training Lead within InnovateUK
- Communication will be sent internally about upcoming training by the Comms Team
- The sending out of invites, chasing invites will stay internal

### **Requirement**

- The Initial work will start by the successful supplier being given an overview of the projects that have been defined to date and the benefits of the project packages.
- The successful supplier will work closely with the internal Training Lead. The Training Lead will ensure that the correct information (overview of project, system access, new ways of working, internal process flows, SOP'S) project timelines, access to the employees is provided as required to ensure they gain the knowledge to be able to write and deliver captivating and engaging training content. Timelines for this are approximately 3 weeks per course.
- After training has been created the Training Lead will want signoff on the content and the training company to demo the session to a trial audience within the business for approval. Timelines for this are maximum 1 week per course.
- The successful supplier will deliver the training remotely (currently) . Should COVID Restrictions be lifted it may be decided that a few courses are best delivered face to face. The organisation of the booking of invites, booking of rooms equipment will be managed by the Training Lead.. As listed above in scope this will be supported with backup material as required. Timelines for this are approximately 3 weeks per course

- All training will be owned by InnovateUK this includes all material, videos, setup guides and any awareness guides – the Training Lead will ensure it is saved in a central place that all can access as required.
- The training material must be in a format that can be easily and regularly updated using internal staff to ensure future updates are recorded
- The Training Lead will work with the Training Company to develop a training schedule.
- The programme currently needs training across 4 of its Projects. The list of courses required are in the table contained at Appendix A. Where there are very different end users this has been drawn out on a separate line.
- The remaining may need a variation added to them of about 20% when they are being delivered to select functions.
- Each course lasts from 1 hour to 2 hours depending on the solution signed off.
- The audience numbers are varied across the courses dependent on the level of interaction required.
- The courses required will need to be varied in their content as to match the requirements for training– system, process, behavioural. The successful supplier will need to be very adaptable in delivery style and content.
- Currently the system that has been identified that the solutions will be built in is Salesforce
- The main system being utilised is Salesforce, but other systems may be selected as the solution is agreed.
- There are 4 courses included in Appendix A that require behavioural skills training and are aimed at improving customer service internally and externally. This will need engaging and interactive examples to be included.

Currently all the courses identified are listed within Appendix A, but this will be adapted as the project solutions are developed and some may get removed. As the project packages are still being developed the training deliverables need to be very flexible. Although there is an overall budget, UKRI would like to ensure this budget is used in the priority areas

## **Reporting**

Regular meeting as required will be arranged between the training lead and the supplier to ensure all training content and arrangement for delivery is on track. Training Content will be signed off before delivery to the business. The week before delivery a dummy run will be conducted to the subject matter experts for signoff.

## **Courses**

The table of courses that have been scoped so far can be found at appendix A below – this is subject to change at any point.

These are all mini projects that can be trained in silo and in parallel if required.

- Each Course content and materials to be completed in a maximum of 3 weeks – this will need to be completed and shared with the business 4 weeks before Go live according to each project plan
- Each course content and materials to be validated and played to key members within the business 1 week before the training is delivered according to each project plan

- Each course will need to be delivered to the business 'just in time' of the Go live date with all backup material completed. The aim is for approximately 3 weeks of training delivery per course.
- The training must be delivered to the end users before the project set date to launch.
- UKRI will create an evaluation form to be completed at the end of each course. UKRI will review the evaluation form and if the course needs adapting to reflect extra information or updated flows this will need to be created before the next set of courses is run on this area. Training Lead will help in the creation of evaluation forms and feedback as required.
- UKRI will measure course take up internally but will expect the supplier to take attendance at the training sessions and feedback to the training lead. The training Lead will chase to ensure they are slotted into future sessions.
- Accessibility for all – where any click through videos are created for any system training there will need to be voiceover as well as visible videos.

### **Payment**

The successful supplier will be paid for each course created and agreed with the training lead. Further payment will be processed for after the delivery of each course once signed off by the contracting authority. The invoice will need to provide a breakdown of work completed and reference a valid purchase order number.

### **Terms and Conditions**

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

## Section 5 – Evaluation 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 and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

The evaluation and if required team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required. After evaluation and if required moderation scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ( $5+5+6=16 \div 3 = 5.33$ ))

Pass / Fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Commercial	SEL2.10	Cyber Essentials
Commercial	SEL2.12	General Data Protection Regulations (GDPR) Act and the Data Protection Act 2018
Commercial	FOI1.1	Freedom of Information
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Maximum Budget
Price	AW5.4	E Invoicing
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
-	-	Invitation to Quote – received on time within e-sourcing tool
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.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20%
Quality	Proj 1.1	Approach	35%
Quality	Proj 1.2	Team Composition	35%
Quality	Proj 1.3	Risk	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:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the 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 there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

**Example**

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

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

**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: Score/Total Points multiplied by 50  $(80/100 \times 50 = 40)$

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

## Evaluation process

The evaluation process will feature some, if not all, the following phases

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"><li>ITQ logged upon opening in alignment with UK SBS's procurement procedures.</li><li>Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to the Contracting Authority or the e-sourcing tool beyond the bidder control are responsible for late submission.</li></ul>
Compliance check	<ul style="list-style-type: none"><li>Check all Mandatory requirements are acceptable to the Contracting Authority.</li><li>Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.</li></ul>

Scoring of the Bid	<ul style="list-style-type: none"> <li>• Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the Selection criteria.</li> </ul>
Clarifications	<ul style="list-style-type: none"> <li>• The Evaluation team may require written clarification to Bids</li> </ul>
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> <li>• 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 Selection criteria.</li> </ul>
Moderation	<ul style="list-style-type: none"> <li>• There shall be moderation meeting(s) between the evaluators to agree clarification questions</li> <li>• To agree final scoring for each Bid and relative rankings of the Bids.</li> </ul>
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>• To confirm contents of the letters to provide details of scoring</li> </ul>

## **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. Responses received after the date indicated in 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 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 Delta 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 and fax details.
- 7.10 Do complete all questions in the 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 e-sourcing tool. Responses received by any other method than requested will not be considered for the opportunity.

## Some additional guidance notes

- 7.25 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Delta eSourcing, Telephone 0845 270 7050
- 7.26 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 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 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 / UKSBS.
- 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 Delta 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 60 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Delta 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 Delta 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 introduced its new Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> April 2014 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. 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](#)

## Appendix A - Table of Courses

This is based on estimates of number of end users. Internal numbers may increase.

Where there are large numbers of external delivery partners included in seminar led training it may be decided to increase the maximum numbers in the sessions to deliver faster.

Timings are current estimates.

	Function Training	Delivery of Training	Go live	Nos of users	Time Training hours	Nos of sessions	Length of course mins	max people per session	Course content specifics	Seminar Led Training	System Tutorial videos	System - step by step user guide	Awareness Guide
<b>Monitoring Lot Training - 1b</b>	Lot training. How the Innovation leads approve the Monitoring Officer to a Lot ( group of competitions ) Training and embedding new processes and policies into the Salesforce system. Explain the new lots that are available	13/05/21	03/06/21	254	18	18	60	14	1	x	x	x	x
<b>Monitoring Lot Training - 1a</b>	Lot training. How the Monitoring Officers apply to be a member of a lot ( group of competitions ). Training and embedding new processes and policies into the Salesforce system. Explain the new lots that are available	13/05/21	03/06/21	350	25	25	60	14	1- Variation of course above	x	x	x	x

<b>Monitoring Lot Training - 1c</b>	Lot training. Monitoring Team need to aware of how Lots work. Combined elements of the above 2 courses. Training and embedding new processes and policies into the Salesforce system. Explain the new lots that are available	<b>13/05/21</b>	<b>03/06/21</b>	<b>15</b>	<b>1</b>	<b>1</b>	<b>60</b>	<b>14</b>	<b>Combined of above Courses</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
<b>MO Communities 2b</b>	MO Communities - How to execute the Monitoring Officer procurement and management processes using the new tool - Pilot. Aimed at Innovation Leads. Training and embedding new processes and policies into the Salesforce system	<b>24/06/21</b>	<b>15/07/21</b>	<b>2</b>	<b>4</b>	<b>2</b>	<b>120</b>	<b>14</b>	<b>1</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
<b>MO Communities 2 a</b>	MO Communities - How to execute the Monitoring Officer procurement and management processes using the new tool - Pilot. Aimed at Monitoring Team. Training and embedding new processes and policies into the Salesforce system	<b>24/06/21</b>	<b>15/07/21</b>	<b>13</b>	<b>2</b>	<b>1</b>	<b>120</b>	<b>14</b>	<b>1 – variation of the course above for different end users</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>

<b>MO Communities 2c</b>	MO Communities - How to execute the Monitoring Officer procurement and management processes using the new tool - Pilot. Aimed at Monitoring Officers . Training and embedding new processes and policies into the Salesforce system	<b>24/06/21</b>	<b>15/07/21</b>	<b>10</b>	<b>2</b>	<b>1</b>	<b>120</b>	<b>14</b>	<b>1- variation of the course above for different end users</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
<b>MO Communities 2b full</b>	MO Communities - How to execute the Monitoring Officer procurement and management processes using the new tool - Full rollout. Aimed at Innovation Leads. Training and embedding new processes and policies into the Salesforce system	<b>09/07/21</b>	<b>30/07/21</b>	<b>253</b>	<b>38</b>	<b>19</b>	<b>120</b>	<b>14</b>	<b>x – same content as 2 b</b>	<b>x - content as 2 b</b>	<b>x - content as 2 b</b>	<b>x - content as 2 b</b>	<b>x - content as 2 b</b>
<b>MO Communities 2 a full</b>	MO Communities - How to execute the Monitoring Officer procurement and management processes using the new tool - Full rollout. Aimed at Monitoring Team. Training and embedding new processes and	<b>09/07/21</b>	<b>30/07/21</b>	<b>14</b>	<b>2</b>	<b>1</b>	<b>120</b>	<b>14</b>	<b>x - same content as 2 a</b>	<b>x - content as 2 a</b>	<b>x - content as 2 a</b>	<b>x - content as 2 a</b>	<b>x - content as 2 a</b>

	policies into the Salesforce system												
<b>MO Communities 2c - full</b>	MO Communities - How to execute the Monitoring Officer procurement and management processes using the new tool - Full Roll out . Aimed at Monitoring Officers. Training and embedding new processes and policies into the Salesforce system	<b>09/07/21</b>	<b>30/07/21</b>	<b>340</b>	<b>49</b>	<b>25</b>	<b>117</b>	<b>14</b>	<b>x – same content as 2 c</b>	<b>x - content as 2 c</b>	<b>x - content as 2 c</b>	<b>x - content as 2 c</b>	<b>x - content as 2 c</b>
<b>Proportionality</b>	Changes to monitor reporting and meetings. Training and embedding new processes and policies into the system ( system tbc) - probably Sales Force as now. New questions will be in the system and they will need to know the best way and how to answer them - internal teams Claims/ MTeams	<b>11/05/21</b>	<b>01/06/21</b>	<b>45</b>	<b>5</b>	<b>5</b>	<b>60</b>	<b>14</b>	<b>1</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>



Application Management - Project Authorisation Full roll out	Project Auth -An efficient workflow tool that exploits collaboration and transparency to provide assurance, risk capture and an audit trail of decision making. Full Rollout. Training and embedding new processes and policies into the Salesforce system - Innovation Leads. Gate 1 and 2	30/03/21	30/04/21	326	47	23	120	14	A draft traning version will have been created internally for you to improve upon.	x	x	x	x
Application Management - Project Authorisation Full roll out	Project Auth -An efficient workflow tool that exploits collaboration and transparency to provide assurance, risk capture and an audit trail of decision making. Full Rollout. Training and embedding new processes and policies into the Salesforce system - Full Roll out Remaining teams Gate 1	30/03/21	30/04/21	37	7	4	120	14	This is a reduced version of the one above for different end users	x	x	x	x
Application Management - Project Authorisation Full roll out	Project Auth -An efficient workflow tool that exploits collaboration and transparency to provide assurance, risk capture and an	30/03/21	30/04/21	33	6	3	120	14	This is a reduced version of the one above for different end users	x	x	x	x

	audit trail of decision making. Full Rollout. Training and embedding new processes and policies into the Salesforce system - Full Rollout - remaining teams Gate 2												
Application Management - Assessor Pool	Assessor Pool .New processes and system to onboard, manage, access and use assessor data. New for Sales force	13/05/21	10/06/21	282	42	21	120	14	1	x	x	x	x
Application Management - Application Briefing	Application Briefing - New Presentation style and content. Training on how to ensure Face to Face Competition Briefings to future applicants are engaging, exciting and inclusive	10/04/21	01/05/21	274	31	20	90	14	4- 1	x	x		x
People and Culture	Colloboration- Menti/ Miro. Internal training on how and when to use collobaration tools e.g Menti and Miro	15/03/21	15/04/21	102	10	5	120	20	2	x	x	x	
People and Culture	Great Customer Experience to Internal staff on Relationship Building. Exciting , Interactive training to ensure	09/06/21	30/06/21	522	88	44	120	12	1	x			

	relationship building skills are increased taking on board a signed off approach												
People and Culture	Great Customer Experience Internal staff on becoming more Customer focused. Exciting , Interactive training to ensure customer focused skills are increased taking on board a signed off approach- Customer Service	09/06/21	30/06/21	522	88	44	120	12	1	x			
People and Culture	Great Customer Experience Internal staff on Networking and Partnering Exciting , Interactive training to ensure network and partnering skills are increased taking on board a signed off approach - Networking	09/06/21	30/06/21	522	88	44	120	12	1	x			
People and Culture	Great Customer Experience- to external Monitoring Officers on how to get best out of applicants - External MO . Exciting , Interactive training to ensure our external delivery partners have the best people skills to	11/08/21	01/09/21	350	14	7	120	50	1	x			

	be able to support and guide participants to achieve their goals.												
People and Culture	Great Customer Experience on External Assessor . Exciting , Interactive training to ensure our external assessors have the best skills to be feedback to applicants,grow as assessors and develop within InnovateUK.	11/08/21	01/09/21	2000	40	20	120	100	1	x			
Funding Assurance - Risk Matrix	Risk Matrix - New process / policies/ reporting for risk checking to reduce time on checking claims. '- New funding risk assessment process, policy and flags/reports within the system	19/04/21	10/05/21	47	8	4	120	14	1	x	x	x	x
Funding Assurance - Overseas Assurance	Overseas Assurance Changes to overseas funding assurance process, policy, data. Instruction guides and awareness guides to +400 people	29/04/21	20/05/21	0	0	0	0	0	1		x		x
Funding Assurance - ODP Watchlist	ODP Watchlist New process, governance and business rules	09/05/21	30/05/21	449	33	36	60	14	1	x	x	x	x

	regarding the failed project closures and watchlist - automation. Clear rules and processes for getting on or off the list. Automation with other systems to remove manual checking. System reporting will come out of Sales Force system.												
Funding Assurance - Project Setup	Project Setup Small automation of manual uploads and viability finance checks using current system – team currently use too many systems	09/06/21	30/06/21	17	2	2	60	14	1	x	x	x	x
Funding Assurance - Project Change Request	Project Change Request - Streamlined and optimised Project Change Request process. Sales Force. Larger groups may be trained	10/06/21	01/07/21	649	66	33	120	20	1	x	x	x	x