# Invitation to Quote

**Invitation to Quote (ITQ) on behalf of Engineering & Physical Sciences Research Council**

**Subject UK SBS Understanding the status of under-represented**

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

**UKSBS**
Shared **Business Services**

**groups in the Information and Communication Technologies**

**Sourcing reference number BLOJEUCR16062EPSRC**

**Table of Contents**

# Section 1 – About UK Shared Business Services

**Putting the business into shared services**

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our customers improve efficiency, generate savings and modernise.

It is our vision to become the leading provider for our customers of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our customers. This allows our customers the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by its customers, UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

**Our Customers**

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business Innovation and Skills (BIS) transition their procurement to UK SBS and Crown Commercial 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 Procurement ambition

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

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

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

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

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

UK SBS Procurement's unique selling points are:

- Focus on the full procurement cycle

- Leaders in category management in common and specialised areas

- Expertise in the delivery of major commercial projects

- That we are leaders in procurement to support research

- Use of cutting edge technologies which are superior to those used generally used across the public sector.

- Use of market leading analytical tools to provide comprehensive Business Intelligence

- Active customer and supplier management

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

**John Collington**

**Former Government Chief Procurement Officer**

# Section 2 – About Our Customer

**Engineering and Physical Sciences Research Council (EPSRC)**

EPSRC is the main UK government agency for funding research and training in engineering and the physical sciences, investing more than £800 million a year in a broad range of subjects – from mathematics to materials science, and from information technology to structural engineering.

The research EPSRC fund affects every aspect of our lives, from energy and the environment, though health, crime prevention, transport, construction and leisure time, to communications, nanotechnology and fundamental science.

The organisation's funded research has already led to improvements in MRI scanning to detect cancer, new ways of predicting and preventing flooding, the first controlled production of atomic antimatter, more durable artificial joints for our bodies, the lasers in our CD and DVD systems and software technologies to boost on-line shopping and the film industry

**Examples of funded research**

- University research into the technology and economics of energy storage, with an emphasis on securing environmentally-friendly and affordable power for the UK.

- A new national Carbon Capture and Storage Research Centre aimed at developing a low- carbon energy system for the UK.

- Developing the next generation of supercomputers.

- Creating a robotic organism for medical use.

Facing the uncertain economic future EPSRC strives to be ahead of the game, investing in world-class research into green technologies, medical advances and high-value manufacturing.

The organisation meets the needs of industry and society by working in partnership with universities to invest in people, scientific discovery and innovation. The knowledge and expertise gained maintains a technological leading edge, builds a strong economy and improves people's quality of life.

www.epsrc.ac.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 | Engineering and Physical Sciences Research Council (EPSRC) Polaris House, North Star Avenue, Swindon, SN2 1SZ |
| 3.2 | Buyer name | Kerry Hammond |
| 3.3 | Buyer contact details | Research@uksbs.co.uk |
| 3.4 | Estimated value of the Opportunity | £45,000.00 |
| 3.5 | Process for the submission of clarifications and Bids | **All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available here. Please note submission of a Bid to any email address including the Buyer will result in the Bid not being considered.** |

| Section 3 - Timescales | | |
|---|---|---|
| 3.6 | Date of Issue of Contract Advert and location of original Advert | 13/09/16 Contracts Finder |
| 3.7 | Latest date/time ITQ clarification questions should be received through Emptoris messaging system | 20/09/16 14.00 |
| 3.8 | Latest date/time ITQ clarification answers should be sent to all potential Bidders by the Buyer through Emptoris | 22/09/16 |
| 3.9 | Latest date/time ITQ Bid shall be submitted through Emptoris | 27/09/16 14.00 |
| 3.10 | Anticipated rejection of unsuccessful Bids date | 17/11/16 |
| 3.11 | Anticipated Award date | 17/11/16 |
| 3.12 | Anticipated Contract Start date | 01/12//16 |
| 3.13 | Anticipated Contract End date | 31/03/17 |
| 3.14 | Bid Validity Period | 60 Days |

# Section 4 – Specification

**<u>Background</u>**

We are using the term ICT (Information and Communication Technologies) to represent the breadth of disciplines covered by the EPSRC Information and Communication Technologies Theme[1].

The scope of the Theme is broad and includes research into computer science, user-interface technologies, communications, electronics and photonics.

The academic disciplines covered are similarly wide-ranging. Whilst the main ones are Computer Science and Electronic and Electrical Engineering (and similar), research in the area also draws from physics, materials, psychology, and sociology departments.

The long term strength of the UK research base depends on harnessing all the available talent. As a funder of research, EPSRC is committed to attracting the best potential researchers from a diverse population into research careers.

However, the research community we support is unbalanced as described in the following paragraphs. We wish to make it clear that that this study is aimed at addressing all underrepresented groups although the examples that follow focus on women as there are more data available on women's experiences in academia than those of other underrepresented groups.

Within the Information & Communication Technologies (ICT) area the number of women pursuing careers in ICT is 18%[2]. The problem starts early with women making up only 13% of computer science undergraduates (compared to 31% for STEM generally (Shadbolt Review of Computer Sciences Degree Accreditation and Graduate Employability, 2016[3]). The same review also highlighted the fact that by 2022 some 518,000 additional workers skilled in ICT will be needed by employers. This is three times the current graduate output. Attracting more women and other under-represented groups into the subject will thus have many benefits.

Although the low number of women entering computer science degrees would seem to indicate that the problem lies in schools, we know from studies in other disciplines that the nature of the barriers to participation are varied and change depending on the career stage. For example, at school it is often about the relative appeal of a subject: how it is presented and the content of the curriculum. If the full breadth of the topic is not taught it will discourage those who are not attracted by the components being emphasised.

In universities the challenges differ and become more about the culture and the environment that prevails in departments. For example, the Institute of Physics show this effect clearly in their 2015 survey of doctoral students "*Gazing at the Future*[4]". This showed that female

---

[1] https://www.epsrc.ac.uk/research/ourportfolio/themes/ict/
[2] HESA data for Computer Science and Electrical and Electronic Engineering (2014/2015)
[3] https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/518575/ind-16-5-shadbolt-review-computer-science-graduate-employability.pdf
[4] http://www.iop.org/publications/iop/2015/page_65643.html

doctoral students' experiences were less favourable than their male counterparts and it explored some of the reasons for this.

The Chemistry community has also successfully investigated the underlying reasons for the low numbers of women in chemistry. The report "*The Chemistry PhD: the Impact on Retention*[5]" helped catalyse an awareness of the issue and institute a change in attitudes.

No similar studies exist for ICT and EPSRC believes that there are challenges which need to be addressed. Preliminary discussions with members of the community have indicated a number of issues including, but not limited to:

- the lack of women and other under-represented groups in ICT research
- public perception and stereotypes of the subject
- taking account of caring responsibilities and also the effect of maternity and career breaks
- competition for recruits from industry
- a lack of transitional roles from student to lecturer
- the role of conferences and seminars in promoting research and careers
- attitudes and cultures in academic departments
- long hours culture

**Aims and Objectives of the Project**

The partners in this study: EPSRC, British Computer Society (BCS), UK Computing Research Committee (UKCRC) and National Microelectronics Institute (NMI), as well as the community want to see an increased representation of under-represented groups in ICT and to see a community where everyone has equal and fair opportunities.

The aim of this study is thus to:

- identify the challenges and barriers faced by under-represented groups pursuing careers in academic research in the Information & Communication Technologies (ICT) and
- document the nature of these challenges and barriers so that the academic community are better informed and thus better able to remove them with the result that more people from under-represented groups are attracted to and remain in the discipline.

The objectives of the study are to:

- identify and describe the nature of the barriers and challenges facing under-represented groups in pursuing academic careers;
- identify the features of the environment and culture of ICT as practised in academia that make it more or less attractive to under-represented groups;
- investigate the nature of the cohort of researchers in ICT across the career stages as the numbers are similar but the composition is unclear:
  - do women have long careers or are they constantly being replaced?
  - are there differences in the domiciles of women at different career stages? (For example, are UK-domiciled women leaving academia to be replaced by

---

[5] https://www.wisecampaign.org.uk/uploads/wise/files/archive/the_chemistry_phdwomensretention_tcm18-139215.pdf

women domiciled overseas?)
- do overseas-domiciled women have different expectations?
- present the report detailing the findings and to make recommendations, backed with evidence including examples, that can be used by the community and/or EPSRC as appropriate, to effect change.

## Suggested Methodology

It is important that the study uncovers the reason behind the numbers. This will require eliciting the experiences of under-represented groups. The study will therefore need to make contact with these groups and hear their stories. As the ICT community is broad and comprises more than one discipline we believe the first stage will need to be an online survey. Interviews and focus groups will be used to follow up points emerging from the surveys. The methodology used will need to involve a diverse range of people within the community.

The evidence and conclusions need to be convincing, so sample size will be an important part of this along with a variety of evidence sources. We believe an online survey will be an important component as it will reach a large number of people in the disciplines concerned. It will be particularly useful to try and capture the views of those who have left ICT. The use of social media might be one way to reach such groups. However, follow-up will be important as we believe that the responses to the survey might be brief and further discussions will be required. Focus groups and/or interviews could be important here as they may be more effective in uncovering the barriers confronting under-represented groups.

We are open to suggestions for alternative methodologies, but whatever the approach the bid must describe how the data will be collected and analysed.

We expect the study to engage with a diverse selection of people from the following groups:

- Postgraduate research students
- Postdoctoral researchers
- Early career lecturers/researchers
- Established career
- Researchers who have left ICT

and to concentrate on the UK academic community.

## Deliverables

- Research instruments (for example, questionnaire, interview topic guide, focus group topic guide) (for comment by EPSRC before deployment)
- Dataset of results and summary of how the analysis was carried out
- Monthly updates on emerging findings and project progress
- Presentation to the project partners
- Quality assured final report with executive summary of the key points and recommendations
- PowerPoint slides summarising the key findings for use by project partners

# 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÷3 = 5.33)

## Pass / fail criteria

| Questionnaire | Q No. | Question subject |
|---|---|---|
| Commercial | FOI1.1 | Freedom of Information Exemptions |
| Commercial | AW1.1 | Form of Bid |
| Commercial | AW1.3 | Certificate of Bona Fide Bid |
| Commercial | AW3.1 | Validation check |
| Commercial | AW4.1 | Contract Terms |
| Price | AW5.5 | E Invoicing |
| Price | AW5.6 | Implementation of E-Invoicing |
| Quality | AW6.1 | Compliance to the Specification |
| - | - | Invitation to Quote – received on time within e-sourcing tool |

## 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 | 10% |
| Quality | PROJ1.1 | Understanding | 30% |
| Quality | PROJ1.2 | Project Plan and Risk Management | 10% |
| Quality | PROJ1.3 | Methodology | 30% |
| Quality | PROJ1.4 | Project Team and Capability to Deliver | 20% |

## 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 x 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 x 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) ÷ 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 x 50 = 40)

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

# Section 6 – Evaluation questionnaire

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

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

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

# Section 7 – General Information

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

**DO:**

7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.

7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions.

7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.

7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission we may reject your Bid.

7.5 Do ensure you utilise the Emptoris messaging system to raise any clarifications to our ITQ. You should note that typically we will release the answer to the question to all bidders and where we suspect the question contains confidential information we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution

7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.

7.7 Do consider who your customer is and what they want – a generic answer does not necessarily meet every customer's needs.

7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.

7.9 Do provide clear and concise contact details; telephone numbers, e-mails and fax details.

7.10 Do complete all questions in the questionnaire or we may reject your Bid.

7.11 Do check and recheck your Bid before dispatch.

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

**DO NOT**

7.12  Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.

7.13  Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them.  Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.

7.14  Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.

7.15  Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Customer to discuss your Bid.  If your Bid requires clarification the Buyer will contact you.

7.16  Do not contact any UK SBS staff or Customer staff without the Buyers written permission or we may reject your Bid.

7.17  Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.

7.18  Do not offer UK SBS or Customer staff any inducement or we will reject your Bid.

7.19  Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.

7.20  Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.

7.21  Do not exceed word counts, the additional words will not be considered.

7.22  Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.

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