

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

Subject UK SBS UKRI Brand Project

Sourcing reference number CS18064

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 SEQUENCIALLY

COMMERCIAL QUESTIONNAIRE

SEL1.1	Please state the full legal name and address and contact details of the organisation tendering (or organisation acting as lead contact where a consortium bid is being submitted).
Bidder guidance	The information should be based on the details of the organisation bidding (or organisation acting as lead contact where a consortium bid is being
3	submitted).
	This is the legal entity with whom we will Contract if successful.
Scoring criteria	For information only
Bidder	Table
response	Bidders full legal name
	Address line 1
	Address line 2
	Address line 3
	Address line 4
	Town / City
	Country
	Post code (or equivalent)
	Bidder contact
	Telephone No.
	Email

SEL1.2	In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)? And/or; In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds of alleged unlawful discrimination?
Bidder guidance	The Bidder shall answer Yes or No Yes – Fail No – Pass *If you have answered "yes" please provide, as an attachment to this question, a summary of the nature of the investigation and an explanation of the outcome of the investigation to date. If the investigation upheld the complaint against your organisation, please use the attachment to explain what action (if any) you have taken to prevent

	unlawful discrimination from reoccurring. You may be excluded if you are unable to demonstrate to the Contracting Authority's satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.
Scoring Criteria	Mandatory Pass / Fail
Bidder	Yes / No
response	

SEL3.11	If you are Commercial organisation with a minimum financial turnover of £36M, please confirm that you are compliant with Section 54 of the Modern Slavery Act 2015.
Bidder guidance	The Bidder shall choose from the following options; A. N/A – our turnover is less than £36M B. Yes – information attached
	C. No (with justification) – we are not compliant but will be prior to commencement of a contract
	D. No – we are not and will not be compliant at the time of award of the contract
Scoring Criteria	Mandatory Pass/ Fail
Bidder response	Selection

FOI1.1	FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR) Information provided in the course of the procurement process may be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004 if requested under an FOI request or EIR request. Please note that some of the information provided may be protected under the FOI Act exemptions and EIR Exceptions. More information on applying the exemptions or exceptions can be found under the Information Commissioners Office (ICO) website http://ico.org.uk Please confirm you have been informed that information provided under this Bid may be disclosed under the FOI Act 2000 and Environmental Information Regulations 2004 and agree to it being published irrespective of submitting a successful or unsuccessful Bid.
Bidder	The Bidder shall answer Yes or No
guidance	Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder	Yes / No

response			
FOI1.2	FOI Act or EIR in Question FOI1. applicable) If you have agreed for your informact or EIR in Question FOI1.1 ple exceptions may apply to your info	N REGULATIONS 2004 (EIR) y if you have agreed for your for the FOI Act or EIR in Question formation to be disclosed under the please complete a field 'N/A' (Not	
Bidder	The Bidder shall provide details of their proposed exemptions/exception in		
guidance	the table below. The Bidder (irrespective of submitti shall note that if the Contracting Au Exemptions or Exceptions have no Regulation, the Contracting Authoriunless another exemption or excep Authority. Be aware that by completing FOI1. for UK SBS to disclose the provided Information Act 2000 or Environme therefore you will not be approached.	ng a successful or unsuccessful Bid) thority believes that the suggested t been applied properly as per the Act or ity will disclose the requested information tion can be applied by the Contracting 1 and answering 'Yes' you have agreed d information under the Freedom of ntal Information Regulation 2004,	
Scoring criteria	For information only		
Bidder response	Confidential Information	Justification for exemption/exception under FOI Act	
	Commercially sensitive information	Justification for exemption/exception under FOI Act	

AW1.1 FORM OF BID I declare that to the best of my knowledge the answers submitted in this ITQ are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to bid for the Contracting Authority's requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may reject this ITQ if there is a failure to answer all relevant questions fully or if I provide false/misleading information. I understand that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by the Contracting Authority, including the ITQ, and any contract entered into by the

	Contracting Authority or its customers with its preferred supplier once the procurement is complete. By submitting a response to this ITQ I agree that our participation may be made public. I understand that the answers given in this response will not be published on the web site (but may fall to be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004). By submitting a response to this ITQ I agree and accept the justification for the Contracting Authority's evaluation criteria. By submitting a response to this ITQ I agreed and accept that the Contracting Authority reserves the right to change without notice the procedure for awarding the Contract, to reject any or all bids for the Contract, to stop the process and not award the Contract (in whole or in part) at any time without any liability on its part. By submitting a response to this ITQ I agree and accept that nothing in this process is intended to form any express or implied contractual relationship between the Parties unless and until a Contract is awarded. The Contracting Authority is not liable for any costs resulting from cancellation of this process nor any costs incurred by Bidders taking part in this procurement process. I understand that where sourcing documents issued by the Contracting Authority or contracts with its suppliers fall to be disclosed the Contracting Authority will redact them as it thinks necessary, having regard (inter alia) to the exemptions/exceptions in the FOIA or EIR.
Bidder	The Bidder shall answer Yes or No
guidance	Yes – Pass
	No – Fail
Scoring	Mandatory Pass / Fail
criteria	
Bidder	Yes / No
response	

AW1.3	CERTIFICATE OF BONA FIDE BID
	The essence of procurement is that the customer shall receive bona fide competitive
	Bids, from all those Bidding. In recognition of this principle, we certify that this is a
	bona fide bid, intended to be competitive and that we have not fixed or adjusted the
	amount of bid by or under or in accordance with any agreement with any other person.
	We also certify that we have not done and we undertake that we will not do at any time
	before the hour and date specified for the return of this bid any of the following:
	(a) Communicate to a person other than the person calling for these
	bids the amount or approximate amount of the proposed bid, except
	where the disclosure, in confidence, of the approximate amount of
	the bid was necessary to obtain insurance premium quotations for
	the preparation of the bid;
	(b) Enter into any agreement or arrangement with any other person that
	he shall refrain from bidding or as to the amount of any bid to be submitted;
	(c) Offer to pay or agree to pay or give any sum of money or valuable
	consideration directly or indirectly to any person for doing or having
	done or causing or have caused to be done in relation to any other
	bid or proposed bid for the said supply / service any act or thing of
	the sort described above.
	In this certificate, the word "person" includes any persons and any body or
	association, corporate or unincorporated, and any "agreement or arrangement"

	includes any such transaction, formal or informal, and whether legally binding or not. We acknowledge that the Contracting Authority will be entitled to cancel the contract and to recover from us the amount of any loss resulting from such cancellation if we or our representatives (whether with our without our knowledge) shall have practiced collusion in Bidding for this contract or any other contract with the Contracting Authority or shall employ any corrupt or illegal practices either in the obtaining or execution of this contract or any other contract with the Contracting Authority. We agree that the Contracting Authority may disclose the Bidders information/documentation (submitted to the Contracting Authority during this Procurement) more widely within Government for the purpose of ensuring effective cross-Government procurement processes, including value for money and related purposes.
Bidder	The Bidder shall answer Yes or No
guidance	Yes – Pass
	No – Fail
Scoring	Mandatory Pass / Fail
criteria	
Bidder	Yes / No
response	

AW3.1	In the event of a Bidder successfully providing the most advantageous offer to the Contracting Authority against a procurement requirement, the Bidder is expected to provide an answer to the attached questions as a validation check prior to the award of any Contract. If the Bidder fails to meet the Contracting Authority's expectations we reserve the right to not award the Contract to the relevant Bidder and either award to the Bidder with the second most advantageous response or run a new procurement.`
Bidder guidance	The Bidder is not required to complete the validation check at this stage but will be required to respond to the questions in the event of providing the most advantageous offer to the Contracting Authority's against a procurement requirement. Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes I have understood that I need to complete the validation check in the event of providing the most advantageous offer to the Contracting Authority against a procurement requirement.

AW4.1	Please confirm your acceptance of the attached Contract Terms. S1 - Services purchasing contract
Bidder guidance	The Bidder shall answer Yes , No with justification or No Yes – Pass No with justification – Pass. See question AW4.2 for details of what amounts to a valid justification.

	No – Fail	
Scoring	Mandatory Pass / Fail	
criteria Bidder	Drop down menu - Yes, No with justification, No	
response	Drop down mend - 1 es, No with justification, No	
-		
AW4.2	Where a Bidder has answered question AW4.1 with 'no with justification' they must detail the justification and the proposed change to the clause.	
Bidder guidance	A justification for not accepting a specific clause or series of clauses from the attached Contract Terms is that the Bidder would be in breach of legal requirements or statutory regulations by complying with that clause or series of clauses (i.e. for the avoidance of doubt, being unable to comply with a clause or series of clauses because of an internal policy reason will not be considered to be a justification for a legal requirement or statutory regulation). Where the Bidder has answered question AW4.1 as "no with justification", the Bidder shall provide a Contract mark-up utilising track changes detailing the relevant clause, the proposed changes to the clause and the justification for the changes. In this case, the Bidder shall score a pass if (but only if) the Contracting Authority considers both the following requirements are satisfied: • the reasons stated as justifying the Bidder's statement that it cannot accept the Contract Terms due to legal requirements or statutory regulations are valid; and • the changes submitted do not create significant risk for the Contracting Authority and are reasonably necessary and proportionate to ensure the Bidder complies with the legal requirements and statutory regulations. Where a Bidder has answered Question AW4.1 with 'Yes' or 'No' it must answer 'not applicable' to achieve a Pass to question AW4.2 (noting that an answer of 'No' to question AW4.1 has already resulted in a fail). In the event of a Bidder answering Yes or No to Question AW4.1 and then providing a proposed mark up, rejection of a clause or a justification for a change then the response will be a Fail.	
Scoring criteria	Mandatory Pass / Fail	
Bidder response	Drop down menu 'N/A' 'I have answered AW4.1 'No with justification' and attach modifications / requested / justification'.	

AW6.4	Non-Disclosure Agreement
	In the event of a Bidder successfully providing the most advantageous offer to UK SBS against a procurement requirement, the Bidder is expected to agree to the Non-Disclosure Agreement attached prior to the award of any Contract.
	NDA5 - NON-DISCLOSURE ·
	If the Bidder fails to agree to this UK SBS reserve the right to not award the Contract to the relevant Bidder and either award to the Bidder with the second most advantageous response or run a new procurement.
Bidder guidance	Bidder guidance - The Bidder is not required to complete the non-disclosure agreement at this stage but will be required to respond to the question in the event of providing the most advantageous offer to UK SBS against a procurement requirement.
	The Bidder shall answer Yes or No
	Yes – Pass
	No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

PRICE QUESTIONNAIRE

AW5.1	Maximum Budget
	As stated within the tender documents, the maximum budget for this requirement will be £110,000 ex VAT, which consists of the £95,000 project budget as well as an additional £15,000 for the post project work, which is not committed and is optional . This should include all costs relating to the projects as well as Travel, Subsistence and Overhead costs.
	Please confirm that your final price submitted within AW5.2 will fall within this budget.
Bidder	The Bidder shall answer Yes or No
guidance	Yes – Pass
	No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder	Yes / No
response	

AW5.2	Bidders are required to complete the Excel Pricing Schedule attached in the Bidder Response section. All prices shall be exclusive of VAT. All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived. AW5.2 Price Schedule CS18064.xl
Bidder guidance	Bidders shall confirm they have completed the Pricing Schedule. The scoring methodology for this question shall be: 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. 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. 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 lowest score possible is 0. For example, assuming the lowest bid is £100,000. **Bid Price** Differential to the lowest price Score which meets the mandatory pass criteria £100,000 100 0 20% 80 £120,000 £140,000 40% 60 £150,000 50% 50 75% 25 £175,000 £200,000 100% 0 £300,000 200% 0 Scoring Maximum Marks 10% criteria Bidder Yes response

AW5.5	The Contracting Authority is committed to delivering payments to suppliers within the timescales stated within our Contract terms and intend to embrace e-invoicing. There are a number of options for suppliers to choose from outlined in the attached FAQ. Please confirm your acceptance of e-payment. Supplier Fact Sheet
	ISupplier
Bidder guidance	The Bidder shall answer Yes or No
	Yes – we will utilise an e-invoicing option - Pass
	No – we will not utilise an e-invoicing option - Fail
Scoring	Mandatory Pass / Fail
criteria	
Bidder	Yes / No
response	

AW5.6	Please confirm if you are successfully awarded this contract your implementation team will work with the Contracting Authority to ensure that e-invoicing is established within 28 days of Contract award by the Contracting Authority.
Bidder guidance	The Bidder shall answer Yes or No
	Yes – Pass
	No – Fail
Scoring	Mandatory Pass / Fail
criteria	
Bidder	Yes / No
response	

QUALITY QUESTIONNAIRE

AW6.1	Please confirm your compliance to the requirements of Section 4 Specification
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

AW6.2	Variable Bids
Bidder	The Contracting Authority shall not accept variable bids as part of this
guidance	Procurement. The criteria in regards to variable bids for this Procurement is outlined below.
	The Bidder shall answer Yes or No
	Yes - We have provided a variable bid only – Fail
	No - We have chosen to only offer a main bid and have not chosen to provide an alternative bid submission – Pass
Scoring	Mandatory Pass / Fail
criteria	, and the second
Bidder	Yes / No
response	

AW6.3	Please list summary details of your awards and accreditations relevant to UKRI's requirements.
Bidder guidance	Where the agency does not have any such accreditations, please provide details of current approaches to Quality Assurance
Scoring criteria	Please upload your response as an attachment. PDF and Microsoft Word For information only
Bidder response	I have attached my response

PROJ1.1	Market View - UK Research and Innovation will work hard to ensure the UK maintains its world-leading position in research and innovation. Please demonstrate your understanding of the national and international research and innovation landscape in which UKRI operates?
Bidder guidance	Bidders are asked to demonstrate your understanding of the national and international research and innovation landscape in which UKRI operates? Please upload your response as an attachment. PDF (Font Size 11, please do not exceed 2 page of A4)
	Any additional content provided beyond this will not be considered or scored during the evaluation process
Scoring criteria	Scoring will be based on 0-100 scoring methodology Maximum Marks: 5%
Bidder response	I have attached my response

PROJ1.2	Understanding of the brief Please demonstrate your understanding of the requirements detailed in the specification and potential strategic questions that the brief 'Evolving Our Brand' poses.
Bidder guidance	Bidders are asked to demonstrate your understanding of the requirements and potential strategic questions that the brief 'Evolving Our Brand' poses. Please upload your response as an attachment. PDF (Font Size 11, please do not exceed 4 pages of A4) Any additional content provided beyond this will not be considered or scored during the evaluation process
Scoring criteria	Scoring will be based on 0-100 scoring methodology Maximum Marks 20%
Bidder response	I have attached my response

PROJ1.3	Methodology to deliver Please provide an outline to demonstrate your methodology to deliver the requirements in 1.3 Stages of Work in the 'UKRI Evolving Our Brand' Brief -
Bidder guidance	Bidders are required to provide an outline to demonstrate your methodology to deliver the requirements in 1.3 Stages of Work in the 'UKRI Evolving Our Brand' Brief Please include;
	 How you would approach the brand strategy and architecture work (please include a visual of the process/outcome where applicable) How you would engage our internal audiences, and what processes and tools you might use
	Please upload your response as an attachment. PDF and (Font Size 11, please do not exceed 4 pages of A4)
	Any additional content provided beyond this will not be considered or scored during the evaluation process
Scoring criteria	Scoring will be based on 0-100 scoring methodology. Maximum Marks 25%
Bidder response	I have attached my response

PROJ1.4	Project Team and Capability to Deliver
	Please demonstrate your knowledge of the skills and expertise that are essential to the successful delivery of this project. Please provide your methodology as to how you will maintain your ability to deliver these through the lifetime of the project.
Bidder guidance	Bidders are asked to demonstrate their knowledge of the skills and expertise that are essential to the successful delivery of this project. Within your response please provide a methodology as to how you will maintain your ability to deliver these through the lifetime of the project.
	As a minimum we require your response to contain the following

	 information: Please identify the key members of the team and what skills and expertise they would bring to this project Cover for staff absence Dissemination of information / amendments Procedures and practises External Support needed Please provide details of any support that would be needed and from whom, in order to undertake and complete this project. An attachment is allowed for this question Please upload your response as an attachment. PDF (Font Size 11, please do not exceed 4 pages of A4) Any additional content provided beyond this will not be considered or scored during the evaluation process
Scoring criteria	Maximum Marks: 15%
Bidder response	I have attached my response

PROJ1.5	Project Management
	Please demonstrate how you intend to manage the project deliverables, including sign-off and actions.
	Please provide an indicative project timetable listing the stages of work as you see them - highlighting key milestones, UKRI consultation and involvement, sign-off time and any constraints and risk, that you can see, along with proposed mitigating actions.
	Also please include how you would ensure all timescales and budgets are adhered to.
Bidder guidance	Bidders are asked to demonstrate how you intend to manage the project deliverables, including sign-off and actions. As a minimum your response should include:
	 An indicative project timetable listing the stages of work as you see them - highlighting key milestones, UKRI consultation and involvement, sign-off time and any constraints and risk, that you can see, along with prosed mitigating actions.

	 How you would ensure all timescales and budgets are adhered to Please also explain how you would engage our leadership team.
	Please upload your response as an attachment. PDF (Font Size 11, please do not exceed 2 pages of A4)
	Any additional content provided beyond this will not be considered
	or scored during the evaluation process
Scoring criteria	or scored during the evaluation process Scoring will be based on 0-100 scoring methodology Maximum Marks: 5%

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PROJ1.6	Project Guardianship
	Please provide a brief outline of how you might address brand guardianship
Bidder guidance	Bidders are asked to provide a brief outline of how you might address brand guardianship;
	As a minimum your response should address the following areas:
	 Brand Partner: Working with us as our brand partner, to provide your views on any strategic brand issues as they arise. This could be anything from a phone conversation to a discussion at board level. Internal branding: guide our Internal Communications team and HR about the branding of our main offices and digital manifestations. As well as advising our Ways of Working Group. Brand measurement: give your view and help us set up an on-going dashboard for measurement. This will include existing staff and government survey questions and suggestions around others, such as public engagement, staff entry/exit questions.
	Please upload your response as an attachment. PDF (Font Size 11, please do not exceed 2 pages of A4)
	Any additional content provided beyond this will not be considered or scored during the evaluation process
Scoring criteria	Information Only
Bidder	I have attached my response

PROJ1.7	Case examples
	Please provide no more than three case studies relevant to this particular activity, which are still running or have been completed within the last three years. You may attach a PDF with embedded web url's or simply attach the work.
	Please describe any measured positive impact the work had.
	Please show any relevancy to your work in a) complex architecture solutions b) evolving a brand c) internal engagement d) working with government & academia.
Bidder guidance	Please upload your response as an attachment. PDF (Font Size 11, please do not exceed 6 pages of A4)
	Any additional content provided beyond this will not be considered or scored during the evaluation process
Scoring criteria	For information only
Bidder response	I have attached my response

PROJ1.8 | Interview | An interview will make up part of the evaluation process of this tender. This interview will be worth 20% of the final score. Suppliers will be invited to an interview on 29th January 2019 to be held in London. Suppliers will be provided with further detail regarding the time etc. after the 23rd January 2019. We would like to ask you to prepare a 30 minute presentation which will answer the following questions. 1. What do you think are the biggest challenges for us in achieving our vision? 2. From what you know at this stage, which areas of the interim brand do you think need changing, evolving, keeping or discarding? 3. Internal Engagement: Whilst we appreciate you don't know our culture or details of our

	structure, how would you approach engaging our staff (general and leadership) regarding, branding and its relevancy to UKRI, the brand project itself and the evolved brand? Please be clear on when you would expect to carry out the work and when you would need the UKRI team to be guided or implement on their own.
	4. What do you think are the biggest challenges for the success of this project?
	5. How would you describe in three words your culture and ways of working?
	There will then be a discussion and question session around your presentation. We expect the entire interview to last around 60 minutes.
	As part of the interview process we would allow you to bring up to 3 representatives, these should be the key personnel involved in delivering this project.
	All suppliers will be invited to attend an interview. However at the discretion of UK SBS, if after evaluating your submitted bid, you are more than 20% behind the lead supplier's score and therefore have no possibility of being the winning bidder we will engage with you so that you may choose not to attend if preferred.
Bidder guidance	Scoring shall be based on 0-100 scoring methodology.
Scoring criteria	Maximum Marks – 20%
Bidder response	Yes, I will be available to attend the interview No, I will not be available to attend the interview