



Invitation to Quote

Invitation to Quote (ITQ) on behalf of UK Research and Innovation (UKRI) - Arts and Humanities Research Council (AHRC)

Subject: A study to explore the role of Research Technical Professionals who contribute to Arts and Humanities Research

Sourcing Reference Number: PS21270

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

Registered in England and Wales as a limited company. Company Number 6330639.
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VAT registration GB618 3673 25
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Version 8.0

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.

Our Customers

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

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

Privacy Statement

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

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

- We will keep your data safe and private.
- 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 (UKRI)

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

Arts and Humanities Research Council (AHRC)

AHRC funds world-class, independent researchers in a wide range of subjects. Their research provides social and cultural benefits and contributes to the economic success of the UK but also to the culture and welfare of societies around the globe.

<https://ahrc.ukri.org/>

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 (UKRI) – Arts and Humanities Research Council (AHRC) Polaris House, North Star Ave, Swindon SN2 1FL
3.2.	Buyer name	Alastair McDonald
3.3.	Buyer contact details	professionalservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£60,000.00 (Maximum) excluding VAT
3.5.	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available here. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Thursday, 9 th December 2021
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Wednesday, 15 th December 2021 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Friday, 17 th December 2021
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Wednesday, 5 th January 2022 11:00
3.10.	Clarifications if required	w/c Monday, 10 th January 2022
3.11.	Anticipated notification date of successful and unsuccessful Bids	Wednesday, 19 th January 2022
3.12.	Anticipated Contract Award date	Wednesday, 19 th January 2022
3.13.	Anticipated Contract Start date	Monday, 24 th January 2022
3.14.	Anticipated Contract End date	Monday, 25 th July 2022
3.15.	Bid Validity Period	90 Days

Section 4 – Specification

1. Background

The Arts and Humanities Research Council (AHRC) is part of UK Research and Innovation (UKRI), funding world-class, independent researchers in a wide range of subjects from history, archaeology and heritage to philosophy, languages, law, information science and the creative arts. We also fund collaborative research and training with a wide range of partners, including with the cultural sector and creative industries, for example, on connecting collections, the design and effectiveness of digital content and the impact of artificial intelligence and interdisciplinary research on a wide range of issues from human rights and inclusion to health and well-being and the environment.

We want to commission a study which will increase our understanding of the roles, skills and career development needs of professionals who contribute to Arts and Humanities Research in a technical capacity, who we refer to as Research Technical Professionals (RTPs).

The key output of this study will be an outward-facing report mapping the breadth and scope of this community, exploring the contributions members of this community make to Arts and Humanities (A&H) research, providing case studies and more in-depth analysis of RTP roles contributing to A&H research.

The study and report should explore how AHRC can support RTPs with regards to the four pillars of the Technician Commitment (visibility, recognition, career development and sustainability). It should provide recommendations on key areas for AHRC support and identify options for how we could take this forward, thereby informing strategic priorities with regards to how AHRC supports A&H RTPs. The study will be an important mechanism to engage external stakeholders with UKRI's ambition of developing a positive research and innovation culture which acknowledges the diverse workforce of practitioners who contribute to developing and delivering research.

UKRI is a signatory to the Technician Commitment and has developed an Action Plan to deliver this commitment. This study needs to consider and develop the current working definition of an A&H Technician so that it is inclusive and accessible to those who might not naturally identify as a 'Technician' or see themselves as belonging to this community of professionals which makes a valuable contribution to A&H research. Throughout this specification document, we use 'Research Technical Professional' (RTP) but this, or other similar definitions, need to connect back to the Technician Commitment and engage all relevant sectors of the A&H community.

The report needs to explore the diversity of the RTP community contributing to A&H research. The study should gather demographic data on the RTP community and, from that evidence base, reflect on the diversity of backgrounds and whether there are any barriers and challenges to entering or staying in an RTP career. In doing this, the study should seek to understand how we can make the role and career opportunities of an RTP more attractive and ensure people from diverse backgrounds are considering this as a career.

This study will be a key part of AHRC's response to the UKRI Technician Commitment Action Plan and is important in the context of the Government's R&D People and Culture Strategy and the Government's Research and Development Roadmap.

UKRI Technician Commitment:

UKRI is a signatory of the Technician Commitment, a university and research institution initiative led by a steering board of sector bodies with support from the Science Council and the Technicians Make It Happen Campaign. It aims to ensure visibility, recognition, career development and sustainability for technicians working in higher education and research.

UKRI signed up to the agreement in 2020 and published an action plan in February 2021 outlining how it will champion the Technician Commitment. All Technician Commitment signatories must produce a two-year action plan setting out interventions required to achieve the principles of the Commitment. The Action Plan explores UKRI's role as a funder, employer and policy maker and is presented in five chapters - Leading and Communication, Technician Identity and Community, Technical Careers, Research, and Innovation Culture and Rewarding and Recognising UKRI's Technicians. The plan sets out UKRI's expectation that the research organisations it invests in recognise and value their technically skilled people and nurture them in reaching their full potential.

The plan is envisaged as a corporate level framework, with the expectation that councils have the flexibility to develop and implement activity tailored to their remits and existing programmes in order to meet the needs of their communities. This study is in response to this Action Plan so we can ensure AHRC is able to effectively support delivery on the four pillars of the framework.

The Government's Research & Development People and Culture Strategy and Research and Development Roadmap support the principles of the Technician Commitment in the respect that technicians should be recognised for the contribution they make to R&D, they should be offered a sustainable career path and there is a need to address skills shortages in particular disciplines, sectors, places, and roles.

2. Aims and Objectives of the Project

The aim of the study is to produce an outward facing report which will increase AHRC's understanding of Research Technical Professionals (RTPs) contributing to Arts and Humanities (A&H) research. It should include what RTPs do, the type and range of organisations / sectors they work for (within and beyond universities), what skillset and experience RTPs have, the contribution they make to Arts and Humanities research, and how AHRC could support them with regards to the four pillars of the Technician Commitment – visibility, recognition, career development and sustainability.

The study will be an important engagement tool in developing dialogue about the A&H RTP community and the Technician Commitment with AHRC's external stakeholders and should produce a set of recommendations on key areas for AHRC support and identify options for how we support RTPs going forward in line with the principles of the Technician Commitment.

The study and subsequent report should explore what the current state of play is with regards to RTPs contributing to A&H research i.e., do people identify as an A&H RTP? It should explore whether AHRC's current working definition of an RTP is appropriate and the reasons why some who could identify as an RTP do not, for example, because of the term 'Technician' and any connotations this term may have. It should provide an overview of what RTPs contribute to A&H research and explore why there is little understanding and knowledge of A&H RTPs.

The study should deliver a scoping exercise which maps the types of job roles which A&H RTPs do within universities and beyond, mapping the range of organisations / sectors RTPs work for e.g., from Creative Industries to the Galleries, Libraries, Archives and Museums (GLAM) sector. The mapping exercise should collect information about what is expected of RTPs in their roles – i.e., what experience and skillsets are required of RTPs and importantly, what contribution they make to A&H Research. It should highlight if there are any themes or trends emerging from this mapping exercise.

The study and subsequent report should offer further detailed analysis of A&H RTPs by developing a range of case studies which explore a range of RTP roles in more detail (the case studies should reflect the diversity of A&H disciplines). Importantly, these case studies should explore the contributions RTPs make to A&H research, and how we can support RTPs with regards to the four pillars of the Technician Commitment - increasing visibility, recognition, career development and sustainability of members of this community.

There should also be an EDI dimension to the study to understand the diversity of the RTP community. The study should gather demographic data on the RTP community and, from that evidence base, reflect on the diversity of backgrounds and whether there are any barriers and challenges to entering or staying in an RTP career. The study should seek to understand how we can make the role and career opportunities of an RTP more attractive and ensure a diverse range of people are entering this sector.

The report should offer analysis of data and in doing this convey the diversity of A&H RTP positions, the range of skills required to support A&H research in a technical capacity, how people enter and develop their careers, what the career challenges and trajectories are, if there are common themes affecting the diverse community of A&H RTPs and what contribution RTPs are making to A&H Research.

The study and subsequent report should summarise key findings and, from these, offer a series of recommendations on key areas for AHRC support and options for how we can support RTPs going forward in line with the principles of the Technician Commitment. The report should also include ideas for how AHRC might continue dialogue with the community and, where appropriate, options for how we might work in partnership with others in order to support RTPs going forward.

Key aims of the study are as follows:

Explore the challenges of identifying A&H RTPs: developing an inclusive definition which people will relate to:

The word 'Technician' is not easily adopted by many who AHRC would consider an A&H RTP e.g. someone who has specialist skills and knowledge and contributes to delivering research, which might include librarians, archivists or conservators. AHRC have developed a working definition, which aims to be broad enough, so that it is accessible to many who 'have specialist skills and knowledge' but there is still more to do, to ensure that people we consider to be A&H RTPs actually identify with this term and therefore feel the Technician Commitment is something which is relevant to them and can support them in their careers. An analysis is needed to summarise the current state of the community and why, when compared to Science, Technology, Engineering and Mathematics (STEM) subjects, it is harder to identify an A&H Technician / RTP.

Map the Research Technical Professional community contributing to Arts and Humanities research:

A map of the RTP community contributing to A&H research, giving clear examples and case studies of what we mean when we refer to this community. This mapping exercise needs to demonstrate the breadth of this community, i.e. the different sectors, organisations and disciplines involved. It needs to explore and provide analysis of the roles and contributions RTPs make to A&H research.

RTP contribution to A&H Research landscape:

The study must explore, and the subsequent report must demonstrate, the contributions RTP professionals currently make, and the potential they have to contribute, to A&H research. The study should capture the value of RTPs to the community in terms of contributions, influence, leadership, and impact of the RTP role on A&H research.

Address the pillars of the Technician Commitment outlining strategic priorities:

The study should create case studies showcasing the diversity of RTP jobs within the A&H and explore how AHRC can address the four pillars of the Technician Commitment i.e., how we can increase visibility, recognition, career development and sustainability of RTPs contributing to A&H research.

Highlight the skills requirements and development needs of Research Technical Professionals contributing to Arts and Humanities research:

There should be an analysis of skills requirements for RTP roles contributing to Arts and Humanities research. This analysis should highlight any skills gaps and needs and what can be done to support skills development.

Increase understanding of EDI issues affecting RTPs:

Understand the diversity of the RTP community. The study should gather demographic data on the RTP community and, from that evidence base, reflect on the diversity of backgrounds and whether there are any barriers and challenges to entering or staying in an RTP career. The study should seek to understand how we can support the UK research and innovation ecosystem to make the role and career opportunities of an RTP more attractive and ensure a diverse range of people are entering this sector.

Provide recommendations and options going forward:

The study and report should provide a list of recommendations on key areas and priorities for AHRC support for RTPs going forward in line with the principles of the Technician Commitment and identify options for how we could take forward that support where appropriate. The report should also include ideas for how AHRC might continue dialogue with the community and external stakeholders to inform future AHRC strategy and, where appropriate, options for how we might work in partnership with others to support RTPs going forward.

3. Suggested Methodology

The successful contractor needs to be able to demonstrate a good understanding of the arts and humanities research and training landscape. They will also need an understanding of the types of roles and organisations (within and beyond the Higher Education Sector) which contribute to A&H research in a technical capacity e.g., roles

within the GLAM (Galleries, Libraries, Archives, Museums) sector, Creative Industries etc and have a clear path to engagement with these communities.

The contractor will need to determine the approach it takes to completing this project. As a starting point, we would expect the contractor to undertake a literature review to draw on any work that has already been carried out in this area.

The contractor should deliver a community engagement phase, where they engage with a wide range of stakeholders within Higher Education Institutions and non-Higher Education Institutions (.e.g. organisations which contribute to A&H research) to understand the roles of Research Technical Professionals contributing to the Arts and Humanities research and innovation ecosystem, understanding the skills required for their roles, their development needs and how we can support them going forward with regards to the four pillars of the commitment, visibility, recognition, career development and sustainability.

Community engagement

The contractor should indicate how community engagement will be undertaken to ensure the wide range of views necessary to ensure a complete picture is captured. The engagement needs to reflect the breadth of disciplinary areas within the arts and humanities and the range of potential employers who employ RTPs.

This is potentially a very large set of stakeholders and the successful bidder will need to be able to identify a mechanism for engagement that ensures it receives responses from all of these important areas that is both representative of the variety of views and manageable in terms of analysis and assessment. The supplier will need to clearly outline its proposed methodology for undertaking this activity along with a clear rationale as to how this would address the issue of representation.

It is important that the contractor engage with a diverse range of stakeholders to ensure the EDI element of the study is delivered.

Methodology

The methodology for engaging the community, seeking a wide range of views, and analysing the data must be determined by the contractor and the proposed approach will be assessed as part of the process.

The contractor should clearly set out the risks associated with this project and how they will be mitigated.

It is anticipated that the review will provide a novel analysis of existing information and generate a range of new data, all of which would be delivered to AHRC as part of the report.

Data protection

The supplier must adhere to UKRI's Privacy Notice and include this in all correspondence with the individuals with whom they engage. They must also confirm that they are 'working towards' GDPR compliance. It will be necessary to sign a non-disclosure agreement as the review will potentially include personal, sensitive, and commercial information.

Suggestions for quantitative data, by no means exhaustive:

- The number of different job titles / roles which RTPs undertake e.g., Librarian, Software Engineer, Archivist etc.
- The number of different disciplines this covers.
- The number of different sectors which employ RTPs outside of Higher Education Institutions e.g., Galleries, Libraries, Archives and Museums to the Creative Industries.
- The potential volume of RTPs contributing to A&H research e.g., there are roughly 5 / 10 / 20,000 skilled individuals contributing to A&H research.

Suggestions for Qualitative data, by no means exhaustive:

- We need to get a sense of types of jobs RTPs are doing, in what industries / sectors (outside of HEI sector), what skills are needed and what skills development needs people have.

Suggestions for Data analysis, by no means exhaustive:

- As noted above we need to build a picture of the breadth of the RTP community – i.e., the diversity of roles, organisations, participants etc.
- It would be useful to get comparative data e.g., how does the A&H RTP community compare to those from STEM subjects.

The supplier should ensure they reflect the diversity of the community, in all senses: EDI, types of role, discipline, Research Organisation type, geography etc.

4. Deliverables

The key output that the contractor will be required to deliver is an outward-facing report which can be used to engage external stakeholders with dialogue concerning how we support A&H RTPs. We intend to develop a series of engagement activities when the report is published to discuss its outcomes and further inform our future strategy.

This report should summarise the current challenges with regards to understanding the A&H RTP community, encouraging the community to identify as an RTP and to seeing the Technician Commitment as relevant for them.

It should map the breadth and scope of the Research Technical Professional community contributing to Arts and Humanities research, and convey what members of this community do, their skillset, career paths and also ask key questions regarding their skills and career development needs.

The report should address the pillars of the Technician Commitment by creating a range of case studies which convey the diversity of A&H disciplines and the technical roles which support A&H research. It should provide suggestions of how AHRC can address the four pillars of the Technician Commitment with regards to increasing RTPs' visibility, recognition, career development and sustainability. It should also offer clear guidance to those we fund in terms of how we recognise and support technicians.

The report should produce a list of recommendations, priorities and options which can be used to inform AHRC's future strategic approaches to supporting RTPs.

It should increase understanding of the demographics of RTPs and whether there are any initiatives to support EDI in this community. The study should gather demographic data on the RTP community and, from that evidence base, reflect on the diversity of

backgrounds and whether there are any barriers and challenges to entering or staying in a RTP career within A&H research.

The report must contain a mix of case studies, examples, data, analysis, and summary of all of the above.

The final report must be delivered to the AHRC no later than 22nd July 2022. We will require an interim report by the beginning of March 2022. We would like monthly updates on project progress.

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	SEL2.12	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
Commercial	AW6.3	Non-Disclosure Agreement
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 Mini Competition. The Contracting Authority considers these weightings to be in line with the framework.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	15%
Quality	PROJ1.1	Approach	30%
Quality	PROJ1.2	Staff to Deliver	10%
Quality	PROJ1.3	Understanding the Project Environment	25%
Quality	PROJ1.4	Project Plan and Timescales	10%
Quality	PROJ1.5	Risk Management	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 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 $(60+60+40+40) \div 4 = 50$

Once the above evaluation process has been undertaken and the scores are apportioned by evaluator(s) this will then be subject to an independent commercial review and moderation meeting, if required by the commercial lead, any and all changes will be formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: $\text{Score/Total Points multiplied by 50}$ $(80/100 \times 50 = 40)$

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

This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criteria, but will still be subject to a commercial review.

Evaluation process

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

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> ITQ logged upon opening in alignment with UK SBS's procurement procedures. Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to the Contracting Authority or the e-sourcing tool beyond the bidder control are responsible for late submission.
Compliance check	<ul style="list-style-type: none"> Check all Mandatory requirements are acceptable to the Contracting Authority. Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.
Scoring of the Bid	<ul style="list-style-type: none"> Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	<ul style="list-style-type: none"> The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> To review the outcomes of the Commercial review To agree final scoring for each Bid, relative rankings of the Bids
Due diligence of the Bid	<ul style="list-style-type: none"> the Contracting Authority may request the following requirements at any stage of the Procurement. Submission of insurance documents from the Bidder Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder Taking up of Bidder references from the Bidders Customers. Financial Credit check for the Bidder
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.

Section 6 – Evaluation questionnaire

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

Guidance on how to register and use the e-sourcing portal is available at <http://www.ukpbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

What makes a good bid – some simple do's 😊

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. 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 90 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 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 2nd 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](#)

8.0 Freedom of information

8.4.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UK SBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the Contracting Authority.

8.4.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.

8.4.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.

8.4.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.

8.4.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UK SBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this ITQ Bidders are agreeing that their participation and contents of their Response may be made public.

8.5. Response Validity

8.5.1 Your Response should remain open for consideration for a period of 90 days. A Response valid for a shorter period may be rejected.

8.6. Timescales

8.6.1 [Section 3](#) of the ITQ sets out the proposed procurement timetable. the Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

8.7. The Contracting Authority's Contact Details

8.7.1 Unless stated otherwise in these Instructions or in writing from UK SBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants and advisers) during the period of this procurement must be directed through the e-sourcing tool to the designated UK SBS contact.

8.7.2

All enquiries with respect to access to the e-sourcing tool may be submitted to Delta eSourcing on 0845 270 7050 please note this is a free self-registration website and this can be done by completing the online questionnaire at <https://uksbs.delta-esourcing.com/>

8.7.3 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the e-sourcing tool. Failure to follow this requirement will result in disqualification of the Response.

Appendix 'A' Glossary of Terms

TERM	MEANING
"UK SBS"	means UK Shared Business Services Ltd herein after referred to as UK SBS.
"Bid", "Response", "Submitted Bid", or "ITQ Response"	means the Bidders formal offer in response to this Invitation to Quote
"Bidder(s)"	means the organisations being invited to respond to this Invitation to Quote
"Central Purchasing Body"	means a duly constituted public sector organisation which procures supplies/services/works for and on behalf of contracting authorities
"Conditions of Bid"	means the terms and conditions set out in this ITQ relating to the submission of a Bid
"Contract"	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
"Contracting Bodies"	means the Contracting Authority and any other contracting authorities described in the Contracts Finder Contract Notice
"Contracting Authority"	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
"Customer"	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
"Due Diligence Information"	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
"EIR"	mean the Environmental Information Regulations 2004 together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
"FoIA"	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
"Invitation to Quote" or "ITQ"	means this Invitation to Quote documentation and all related documents published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. NOTE: This document is often referred to as an Invitation to Tender within other organisations
"Mandatory"	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
"Named Procurement person "	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
"Order"	means an order for served by any Contracting Body on the Supplier
"Other Public Bodies"	means all Contracting Bodies except the Contracting Authority
"Supplier(s)"	means the organisation(s) awarded the Contract
"Supplies / Services / Works"	means any supplies/services and supplies or works set out at within <u>Section 4 Specification</u>