**Invitation to Tender (ITT) Guidance Document**

Integrated Grants Management, Financial Management, Human Resource Management, Inventory and Procurement Management System

**18th of July 2023**

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**1.Introduction**

No hard copy documents will be issued, and it is the intention of The Pirbright Institute (the “Institute”) that all communications between Tenderers and the Institute will be conducted via email. To ensure all communications relating to this procurement are managed effectively and received in a timely manner, Tenderers must ensure that the contact details of its nominated recipient are accurate at all times.

**2.Information**

**2.1 Finder a Tender Notice**

The Institute placed a notice in the Find a Tender notice 18th of July 2023 inviting Expressions of Interest in the form of a completed SQ Selection Questionnaire and ITT from parties wishing to be considered as potential Tenderers of an Integrated Grants Management, Financial Management, Human Resource Management, Inventory and Procurement Management System.

**2.2 General Information**

No information contained in the Invitation to Tender (“ITT”) or in any communication made between the Institute and any Tenderer in connection with this ITT shall be relied upon as constituting a contract, agreement, or representation that any contract shall be offered in accordance with the ITT. The Institute reserves the right, subject to the appropriate procurement regulations, to change without notice the basis of, or the procedures for, this procurement process or to terminate the process at any time. Under no circumstances shall the Institute incur any liability in respect of the ITT or any supporting documentation or the preparation of Tenderer’s response.

Direct or indirect canvassing of any employee or agent by any Tenderer concerning this requirement, or any attempt to procure information from any employee or agent concerning the ITT, may result in the disqualification of the Tenderer from consideration for this requirement.

The ITT is being made available at the same time and on the same basis to all Tenderers. All information supplied by the Institute is and shall remain the property of the Institute and must be returned on demand, without any copies being retained.

Save to the extent made publicly available by the Institute, the information in the ITT and any accompanying document is made available on condition that it is treated as confidential by the Tenderer and is not disclosed, copied, reproduced, distributed or passed to any other person at any time except for the purpose of enabling a submission to be made (for example, disclosure by a Tenderer to its advisors who are directly involved in the bid is permitted provided they have each given an undertaking at the time of receipt of the relevant information (and for the benefit of the Institute) to keep such information confidential). In particular (but without prejudice to the generality of the foregoing) the Tenderer shall not and shall procure that any person to whom it communicates any such information shall not, make any announcement or public disclosure whatsoever concerning the ITT, any accompanying document, or the procurement to which it relates.

**2.3 Purpose of this Guidance Document**

The purpose of this guidance document is to provide information about the Institute; the requirements overview and context; the outline procurement process and the evaluation and award criteria.

To evaluate your ability to meet the advertised requirement the Institute asks all Tenderers to complete the ITT. The ITT should be read in conjunction with this accompanying document.

**3. About us**

The Pirbright Institute is a unique national centre that works through its highly innovative fundamental and applied bioscience to enhance the UK capability to contain, control and eliminate viral diseases of animals and viruses that spread from animals to humans. We thereby support the competitiveness of UK livestock and poultry producers and improve the health and quality of life of both animals and people.

The Institute employs around 400 staff plus 50 research students and visiting scientists in Surrey, where investment by BBSRC has resulted in a redevelopment of the site and the construction of a high-level containment facility – the BBSRC National Virology Centre: The Plowright Building and a level two facility, BBSRC National Vaccinology Centre: The Jenner Building

**3.1 Our mission**

To be the world's leading innovative centre for preventing and controlling viral diseases of livestock.

**3.2 Our vision**

Apply scientific research to prevent and control viral diseases, protecting animal and human health and the economy.

**3.3 Our values**

The Pirbright Institute and its staff and students take pride in being a world-class organisation where knowledge, expertise, facilities, professional excellence, and rigorous academic, biosafety, and ethical standards combine to generate global health and economic impacts. Our values include:

**P**assion – for the highest quality standards, delivery, and performance

**R**eliability – in everything we do - leadership, learning, biosecurity, problem anticipation and containment of unexpected events.

**I**nnovation – is the driving force behind our fundamental and applied science. Our work is positioned at the cutting edge of science to deliver solutions for global good.

**D**ignity and respect – we respect and trust all in our diverse community.

**E**xcellence – we aim to deliver the best in all aspects of our work including health, safety, biosafety, scientific research, customer service and protecting the environment.

**4. Requirements Overview and Context**

**4.1 Context for ERP Implementation**

Our current applications for Finance, Human Resources, Grants, Inventory Management system & Procurement are all in extended support, with them going end of life on 31 March 2025, after that date the applications will be unsupported by Access, and we will be unable to use them. This date is fixed and there is no further option for us to extend our current support agreements and all the applications will need to be replaced.

**4.2 Project Scope**

The project scope as described in the Find a Tender notice includes Grants Management, Financial Management, Human Resource Management, Inventory, and a Procurement Management System.

The Institute’s overarching requirement in relation to the proposal is for tenderers to offer a system that is at least comparable and ultimately better than that provided by the Access System.

A future requirement will be to extend the system to include management information for end users specifically a system which enables the Institute to capture, analyse, and export information on our activities and projects both for internal and external reporting. Key benefits should include, scientists providing data once only, more efficient linkages of data (e.g., patent applications or knowledge exchange activities related to specific applications), ability to provide comprehensive reports to our funders as efficiently as possible, provide data to support grant submissions and Institute assessment exercises.

**4.3 High Level Requirements**

As noted in the SQ Selection Questionnaire, the Institute requires an integrated Grants Management, Financial Management, Human Resource Management, Inventory and Procurement Management System or integrated ERP System.

The requirements are to be met by a reliable, single sign-on (active directory) integrated system and will include migration, transition, training, implementation and ongoing support and maintenance.

The Institute will seek a live system commencement date of 1st April 2025 for fully tested systems and processes.

The key areas for implementation of a new system include:

* Grants management capabilities including grant concept, grant proposal / application; grant submission; grant funding; grant management and grant close. The solution must be able to allocate a scientists salary cost across multiple projects and flow into / update in, the relevant project budgets.
* Financial management capabilities including full economic costing (overhead absorption); accounts payable; accounts receivable; fixed assets; general ledger; project ledger; sales ledger, purchase ledger, expenses planning; budgeting; forecasting; and cash management.
* Human resource management capabilities including recruitment; working terms and conditions; attendance and absence; information and records; transfers; employee relations; legal cases; occupational health; immigration visa’s; housing; learning and development; job evaluation and grading; performance management, reward, and recognition; exit process; time and attendance; and employee self-service.
* Inventory capabilities.
* Procurement management capabilities including raising requisitions; processing purchase orders; punch-out to supplier websites; receipting goods and services; managing supplier returns; dangerous goods; identifying orders >£10k (quotes); identifying orders; stores; inventory; and specialised shipping.
* Self-service capabilities including the ability for end users to access items to action; personal data; team calendar; pay details; HR details; expenses; procurement; training; and professional details.
* Chart of Accounts structure or alternate concept.
* Labour distribution capabilities including the ability to allocate end users (specifically scientist) across multiple projects.
* Workflow capabilities in Finance, HR, Payroll, Procurement, Grants, Self-service, COA, Reporting, Approvals and Project Module.
* Internal and external reporting capabilities across all areas of grants management; financial management; human resource management; payroll; procurement management, self-service, COA, reporting and project module.
* Approvals management across all areas of grants management; financial management; human resource management; inventory; procurement management, self-service, COA, reporting and project module.

**4.4 Key User Groups and Estimated Numbers**

Key User Groups and Estimated Numbers are listed in the table below.

|  |  |  |
| --- | --- | --- |
| **Key User Group** | **Type of System User** | **Estimated staff members** |
| HR Department | Heavy | 12 |
| Finance Department | Heavy | 15 |
| Grants Department | Heavy | 5 |
| Procurement Department | Heavy | 7 |
| End User (Raise Requisition) | Light | 400 |
| End User (Raise Requisition) | Heavy | 20 |
| End User (Self-Service) | Light | 400 |
| End User (Viewing Reports) | Heavy | 50 |
| End User (Creating Reports) | Heavy | 15 |
| End User (Approvals) | Heavy | 50 |

**5. Outline Procurement Process**

**5.1 Procurement Timetable**

Set out below is the proposed procurement timetable. This is intended as a guide, and whilst the Institute does not intend to depart from the timetable, it reserves the right to do so at any stage. Should the Institute need to depart from this timetable, it will endeavour to inform Tenderers of changes as soon as practicable.

|  |  |
| --- | --- |
| **Timetable** | **Dates** |
| Notice published (Open Procedure) on Find a Tender notice and Contracts finder Notice and Issue ITT SQ Selection Questionnaire | 18/07/2023 |
| Deadline for ITT clarification questions | 04/08/2023 |
| Issue Clarifications and answers | 09/08/2023 |
| Deadline for receipt of final tenders and SQ | 28/08/2023 |
| Demonstrations Top 3 Suppliers | 05/09/2023-07/09/2023 |
| Evaluation of ITT documents complete | 25/09/2023 |
| Notification of award decision & commencement of standstill period | 25/09/2023 |
| Expiry of 10-day standstill period | 10/10/2023 |
| Contract Award | 11/10/2023 |
| Contract Commencement Date | No later 02/01/2024 |

**5.2 Instructions for Completion**

Tenderers should follow the instructions outlined below when completing the ITT Response. Failure to complete the ITT Response in accordance with this guidance may result in disqualification from the procurement process.

Tenderers should provide full details for any claims, statements or examples used. Claims that are not supported with examples or explanation will score less well than those that are supported.

Tenderers should address each aspect of criteria and questions. Tenders will be marked down for incomplete responses.

It is the Tenderer’s responsibility to make sure that it is eligible to participate in this procurement exercise.

All responses to questions in the ITT must be inserted into the relevant answer box provided. Only information entered the appropriate answer box or contained within an attachment supplied in accordance with the Institute's instructions will be taken into consideration for the purposes of evaluating the ITT Response.

The ITT Response should be completed in the English (UK) language.

Tenderers must answer all questions honestly and accurately and ensure that the information they provide is correct.

Where boxes are provided for straightforward answers, such as where a YES or NO response is required, please clearly confirm your response by selecting the appropriate answer from the box provided.

Do not include any additional material other than that asked in the ITT document or use appendices.

Do not answer questions by cross referring to other answers or to other materials (e.g., case studies or reports located on a web site). Each question answered must be complete.

**5.3 Submitting an ITT Response**

The Tenderer is responsible for ensuring that its ITT Response has been fully completed and is available to the Institute by the ITT Response Deadline.

All ITT Responses must be submitted to the Institute via email to [pirbrighttenders@pirbright.ac.uk](mailto:pirbrighttenders@pirbright.ac.uk). ITT Responses submitted by any other means will not be accepted. The ITT Response may be completed and submitted at any time before the ITT Response Deadline.

At the time of final submission, the Tenderer must ensure that it has completed all the questions and submitted all the attachments requested, as Tenderers will lose the ability to supplement their ITT Response after the ITT Response Deadline.

Please note that documents submitted electronically that include a typed name of an authorised person of the Tenderer along with a typed submission date will, upon being submitted, be deemed to have been signed electronically.

Please ensure ITT response documents are pdf documents only.

Please leave sufficient time for emailing ITT Responses. If Tenderers experience any problems emailing documents, they should contact [pirbrighttenders@pirbright.ac.uk](mailto:erp-tender@pirbright.ac.uk) as soon as possible.

The Institute reserves the right not to accept any late submissions unless Tenderers make contact BEFORE the deadline. The Institute gives no commitment at all to accept any late submissions.

A Tenderer may withdraw from thi*s* procurement by choosing not to submit an ITT Response by the ITT Response Deadline. However, the Institute encourages any Potential Tenderer withdrawing from this Procurement to notify the Institute via email.

ITT and SQ Responses must be returned via email by **12 noon BST on the 28/08/2023**. The Institute will not accept any ITT Response which is returned by any method (including paper documents) other than via email.

**5.4 Questions about the Procurement**

All requests for clarification or further information in respect of the ITT should be submitted via email to [procurement@pirbright.ac.uk](mailto:erp-tender@pirbright.ac.uk).by **04/08/2023 at 12 noon** (“Clarification Deadline”). No approach of any kind in connection with the ITT may be made to any other person within or associated with the Institute.

The Institute will not enter exclusive discussions regarding the requirements of this procurement with Tenderers.

To ensure that all Tenderers have equal access to information regarding this procurement, the Institute will publish all its responses to all questions raised by all Tenderers.

All responses to Tenderer questions will be published by the Institute as a “Questions and Answers” document.

Responses to questions will not identify the originator of the question and will be answered in batches, rather than one at a time, with updates appearing at regular intervals (approximately once or twice a week). The Institute will endeavour to publish responses to all questions outstanding at the end of the clarification period, within three working days following the Clarifications Deadline.

If a Tenderer wishes to ask a question or seek clarification without the Institute revealing the question and the answer, then the Tenderer must notify the Institute and provide its justification for withholding the question and any response. If the Institute does not consider, at its sole discretion, that there is sufficient justification for withholding the question and the corresponding response, the Institute will decide whether the clarification should be published but will invite the Tenderer to discuss whether:

* The question/clarification and the response should in fact be published; or
* It wishes to withdraw the question/clarification.

If it is agreed that the question/clarification and the response should remain confidential then the question/clarification and the response shall not be communicated to all Tenderers.

Tenderers are responsible for reading the ‘Questions and Answers’ document for any responses to questions, general clarifications or other information issued by the Institute. Answers to such questions may contain important information that may affect how Tenderers complete their ITT Response.

All responses received and any communication from Tenderers will be treated in confidence.

**5.5 Tenderers Contact Points**

Tenderers are asked to include a single point of contact in their organisation for their ITT Response. Tenderers must keep contact details up to date or they will be unable to receive communications from the Institute.

The Institute will not be responsible for contacting Tenderers through any route other than the nominated contact where appropriate. Tenderers must therefore undertake to notify any changes relating to their contact promptly.

**5.6 Additional Information**

Recipients are invited to complete the ITT Response and to submit it, together with any requested supporting information, via email to [pirbrighttenders@pirbright.ac.uk](mailto:erp-tender@pirbright.ac.uk).

The Institute expressly reserves the right to require a Tenderer to provide additional information supplementing or clarifying any of the information provided in response to the requests set out in the ITT.

The Institute will not reimburse any costs incurred by Tenderers in connection with preparation of their ITT Responses or otherwise in relation to this procurement process.

**6. Tender Instructions**

**6.1 Conditions of Tender**

Tenderers should ensure that their Tenders contain all the requested components and information. Failure to provide these may result in a Tender not being admitted to the evaluation process.

**6.2 Basis of Tenders**

The contract will be awarded applying the evaluation criteria set out in this documentation.

**6.3 Tender Acknowledgement**

Your Tender submission must be returned with a completed Tender Acknowledgement (listed in the ITT document) in all circumstances.

**6.4 Non-consideration of Tender**

At its absolute discretion, the Institute may refrain from considering a Tender if:

1. There are omissions in the Tender.
2. It is not in accordance with these Conditions of Tendering.
3. The Tenderer makes or attempts to make any variation or alteration except in accordance with these Conditions of Tendering.

**6.5 Rejection of Tender**

The Institute may choose to reject a Tender, without prejudice to any other civil remedies available to the Institute or any criminal liability the Tenderer may attract, if the Tenderer:

1. Fixes or adjusts the prices shown in its Tender by or in accordance with any agreement or arrangement with any other person or by reference to any other Tender; or
2. Communicates to any person other than the Institute the amount or approximate amount of the prices shown in its Tender, except where such communication is made in confidence to obtain quotations necessary for the preparation of the Tender or for the purposes of obtaining the necessary insurance, Bond Undertaking or Guarantee Undertaking; or
3. Agrees with any other person than such other person shall refrain from submitting a Tender or shall limit, restrict, or reduce the prices to be shown by any other Tenderer in its Tender; or
4. Offers or agrees to pay or give, or does pay or give any sum of money, inducement, or valuable consideration directly or indirectly to any person for doing or having done, or for causing or having caused to be done any act of omission in relation to any other tenderer or any other person's proposed Tender; or
5. In connection with the award of the Contract, commits an offence under the Prevention of Corruption Acts 1889 to 1916 or gives any fee or reward the receipt of which is a criminal offence.
6. Has directly or indirectly canvassed any staff member or associate of the Institute concerning the acceptance of any Tender or has directly or indirectly obtained or attempted to obtain Confidential Information or any information from any such member or associate or any contractor engaged in providing services to the Institute concerning any other tenderer or Tender submitted by any other tenderer.

**6.6 Variant Bids**

As advised in the Find a Tender contract notice, variant bids will not be accepted.

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**6.7 Terms and Conditions of Contract**

Any contract/s agreed because of accepting the Tenderers bid in response to this invitation to tender for the services described herein shall be governed by the terms and conditions as outlined in the contract.

**6.8 Acceptance of Tender**

The Institute is not bound to accept the lowest of any Tender and reserves to itself the right at its absolute discretion to accept or not accept any Tender.

An acceptance of a Tender by the Institute shall be in writing and posted to the successful Tenderer and the Contract shall then be made and become binding.

The Institute reserves the right to discontinue and/or recommence the tender process at any time.

**6.9 Warranties**

In delivering a Tender, the Tenderer warrants and represents to the Institute that:

1. It has not conducted any of the acts or matters referred to above as conditions which would make any tender void or non-acceptable, and has complied in all respects with, these Conditions of Tendering.
2. All information, representations and other matters of fact communicated (whether in writing or otherwise) to the Institute by the Tenderer or its employees or officers in connection with or arising out of the Tender are true, complete, and accurate in all respects.
3. It has made its own investigations and research and has satisfied itself in respect of all matters relating to the Tender, Conditions of Contract and Specification and has not delivered the Form of Tender and will not have entered the contract in reliance on any information, representations or assumptions (whether made orally, in writing or otherwise) which may have been made by the Institute.
4. It has full power to enter the contract and perform the Services [or make Supplies] and will if requested produce evidence of that to the Institute.
5. It is of sound financial standing, and its staff and employees are not aware of any circumstances (other than as may be disclosed in the audited accounts or other financial statements) which may adversely affect its financial standing in the future.
6. It has and will have sufficient working capital, skilled employees, equipment, machinery, and other resources available to it to perform the Services in accordance with the Contract and to the Contract Standard for the Contract Period; and
7. It has obtained all necessary consents, licences, and permissions to enable it to provide the goods or works/perform the services and will throughout the Contract Period obtain and maintain all further and other necessary consents, licences, and permissions to enable it to perform the Services.

**6.10 Public Disclosure**

The Tenderer shall not use the Institute’s name for promotional purposes, without the prior written consent of the Institute.

**6.11 Security**

The Tenderer shall, when attending the Institute’s premises or facilities, comply with all reasonable directions and procedures relating to occupational health and safety and security in effect for those premises or regarding those facilities, as notified by the Institute.

**6.12 Conflict of Interest Declaration**

The Tenderer warrants that, at the date of signing of the contract, no conflict of interest exists or is likely to arise in the performance of its obligations under this Contract. If, during the term of this Contract, a conflict or risk of conflict of interest arises, the Tenderer undertakes to notify the Institute immediately in writing of that conflict or risk.

The existence of or failure to declare such conflict of interest may entitle the Institute to terminate the Contract.

**7. Evaluation and Award**

**7.1 The Evaluation Process**

The evaluation process will be conducted as follows:

ITT Responses will be assessed in detail to determine whether the Tenderer has the technical and professional ability / necessary skills and experience to undertake the contract. The applicable minimum standards will be applied and any ITT Responses, which fail to meet one or more of the minimum standards will not be considered further.

Once scored following the methodology described in section 7.2 and 7.3, responses will be ranked with the highest scoring Tenderer achieving a rank of 1, the next highest a rank of 2 (and so on).

In the event of a tie, those scoring highest in the most heavily weighted questions (6.1 to 6.27) will proceed. If there is still a tie, then the remaining weighted questions in descending order will be used to identify a difference between Tenderers.

Tenderers should complete the appropriate parts of the ITT in accordance with the table below.

|  |  |
| --- | --- |
| **Selection Criteria** | **Information to be provided by** |
| Mandatory Functional Criteria | Tenderer to provide information as set out in Section 3 of the ITT document. |
| Mandatory Non-Functional Criteria | Tenderer to provide information as set out in Section 4 of the ITT document. |
| Demonstrations | Tenderer at Institute’s premises on 05/09/2023 and 07/09/2023 |
| Evaluation Criteria | Tenderer to provide information as set out in Section 6 of the ITT document. |
| Pricing Criteria | Tenderer to provide information as set out in Section 7 of the ITT document. |

Failure to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean that a Tenderer is excluded from the procurement process.

All questions have been categorised as:

* Yes / No
* Scored questions: attracting a weighting of “High”, “Medium” or “Low” importance, which is applied as a multiplier to the scores awarded to these questions.

.**7.2 Assessment of Demonstrations**

For demonstrations the methodology explained below will be applied.

A panel consisting of project team members and subject matter experts will score on overall presentation, demo script 1 and demo script 2 for specific modules covering HR, Inventory, Finance, Procurement and Grants Administration.

The panel will score marks out of 10 in their respective areas, and this will be averaged to give an overall score.

**7.3 Assessment of Evaluation Criteria**

For scored questions, the methodology explained below will be applied.

A panel consisting of project team members and subject matter experts will score these questions, their individual scores and justifications will be noted. The panel will then come to a consensus agreement on the overall score to be applied per question.

Questions have been given a weighting of High, Medium, or Low importance. These weightings will be applied to the scores awarded to each question. Scores will be determined by evaluators using the following scoring guidance:

| **Assessment** | **Score** | **Interpretation** |
| --- | --- | --- |
| Excellent | 10 | Satisfies the requirement with significant additional benefits.  In addition to demonstration by the Tenderer of the relevant ability, flexibility, understanding, skills, resource, and quality measures required to provide the system, the response identifies factors that will offer significant potential added value. Appropriate evidence provided to support the response. |
| Good | 8 | Satisfies the requirement with recognisable additional benefits.  In addition to demonstration by the Tenderer of the relevant ability, flexibility, understanding, skills, resource, and quality measures required to provide the system, the response identifies factors that will offer potential added value. Appropriate evidence provided to support the response |
| Acceptable | 6 | Satisfies the requirement.  Clear demonstration by the Tenderer of the relevant availability, understanding, skills, resource, and quality measures required to provide the system. Appropriate evidence provided to support the response. |
| Minor Reservations | 4 | Satisfies the requirement with minor reservations.  Some minor reservations in respect of the Tenderer's relevant ability, flexibility, understanding, resources, and quality measures required to provide the system, with little or no evidence to support the response. |
| Serious Reservations | 2 | Satisfies the requirement with major reservations.  Considerable reservations in respect of the Tenderer's relevant ability, flexibility, understanding, skills, resource, or quality measures required to provide the system. Little or no evidence to support the response. |
| Unacceptable | 0 | Does not meet the requirement.  Does not comply and/or insufficient information provided to demonstrate that the Tenderer has the ability, understanding, skills, resource, or quality measures required to provide the system. Little or no evidence provided to support the response |

Once a score for each relevant question has been determined by the relevant evaluators and reviewed in moderation, the following multiplier effects will be implemented using the weightings described.

* High importance: Has a multiplier of 10, for example a score of 10 on a question with a weighting of “high importance” would result in an actual score of 100.
* Medium importance: Has a multiplier of 6, for example a score of 10 on a question with a weighting of “high importance” would result in an actual score of 60.
* Low importance: Has a multiplier of 1, for example a score of 10 on a question with a weighting of “low importance” would result in an actual score of 10.

Once the scores for each question have been calculated using the relevant multiplier effects (described above), the total will be calculated (expressed as several points) and the weightings (set out in Section 7.4 Evaluation Criteria and Weightings) will be applied to give an overall score.

In addition to the above, the questions in sections 3 and 4 are pass/fail. This means that irrespective of the total score achieved, if a Tenderer fails one or more of these questions, they may, at the Institute’s discretion, be eliminated from the procurement process.

If a Tenderer fails a ‘pass/fail’ question or provides an answer which is unclear, then the Institute reserves the right to request clarification. The ITT Response should be completed by a named person who can be contacted for further details should the need arise.

**7.4 Evaluation Criteria and Weightings**

ITT Responses will be assessed in detail to determine which of the Tenderers can best demonstrate the technical and professional ability/necessary skills and experience to undertake the contract.

The Evaluation Criteria will be broken down as detailed below:

| **Section** | **Question** | **Criteria** | **Categorisation** | **Weight** | **Multiplier** | **Max**  **Weight** |
| --- | --- | --- | --- | --- | --- | --- |
| 3 |  | Mandatory Functional Criteria | Yes - Bidder Included  No – Bidder Excluded | N/a | N/a | N/a |
| 4 |  | Mandatory Non-Functional Criteria | Yes - Bidder Included  No – Bidder Excluded | N/a | N/a | N/a |
| 5 | Overall Presentation | Demonstrations | Scored | High | 10 | 100 |
| 5 | Demo Script 1 | Demonstrations | Scored | High | 10 | 100 |
| 5 | Demo Script 2 | Demonstrations | Scored | High | 10 | 100 |
| 6.1 | Workflow | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.2 | Business Rules | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.3 | User Interface & Usability | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.4 | Integration | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.5 | Application Security and Data Access | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.6 | Audit Trail and Forensics | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.7 | Reporting | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.8 | Technology Roadmap | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.9 | Agility and Ease of Use | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.10 | Ability to Handle Two Types of Terms and Conditions | Evaluation Criteria | Scored | High | 10 | 100 |
| 6.11 | Requirements Spec | Evaluation Criteria | Scored | High | 10 | 100 |
| 6.12 | System Architecture | Evaluation Criteria | Scored | High | 10 | 100 |
| 6.13 | Authorisation | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.14 | Data Migration Approach | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.15 | Estimated Hardware / Infrastructure Requirements | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.16 | Understanding of Requirements | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.17 | Deliverables and Methodology | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.18 | Documentation Approach | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.19 | Testing / Quality Approach | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.20 | Software Support Proposed | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.21 | Warranty / Postproduction Support | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.22 | Team Structure and Rationale | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.23 | Project Resourcing | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.24 | Training Approach & Knowledge Transfer | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.25 | Project Plan | Evaluation Criteria | Scored | Low | 1 | 10 |
| 6.26 | Disaster Recovery | Evaluation Criteria | Scored | Med | 6 | 60 |
| 6.27 | UAT | Evaluation Criteria | Scored | Low | 1 | 10 |
| 7 | Software | Pricing Criteria | Price |  |  | 560 |
| **Grand Total** | **100%** |  | | | | **1950** |

**7.5 Model Answers**

Model answers are provided as below. Provision of factors that offer added value or significant added value will be scored a higher mark.

| **ID** | **Question** | **Evaluation** |
| --- | --- | --- |
| 3 | Mandatory Functional Criteria | These questions require a Yes / No response and must fulfil all criteria of the question. |
| 4 | Mandatory Non-Functional Criteria | These questions require a Yes / No response and must fulfil all criteria of the question. |
| 5 | Overall presentation | Excellent overall presentation showcasing high quality, fully integrated system with consistent look and feel graphical user interface (GUI) for all modules. Confidence in presenter’s ability to demonstrate the system and provide answers to any functional and technical questions on your product. |
| 5 | Demo Script 1 | Script followed as laid out showcasing high quality, fully integrated system with consistent look and feel GUI for all modules. Proven ability of strong offering for modules: HR & Payroll, Finance, Procurement and Grants Administration.  Expertise on a functional and technical level to answer any questions on your product. Provision to demonstrate common process flows for each functional area and cross-module. |
| 5 | Demo Script 2 | Script followed as laid out showcasing high quality, fully integrated system with consistent look and feel GUI for all modules. Proven ability of strong offering for modules: Finance and Procurement.  Expertise on a functional and technical level to answer any questions on your product. Provision to demonstrate common process flows for each functional area and cross-module. |
| 6.1 | Workflow | As well as answering information sought in question, indicate how your system can provide a high-quality GUI, easily navigable, fully integrated, and easily updateable workflows cross-module. Workflows can be implemented with ease with basic training for end users. Use of ‘current’ system screenshots to provide illustration.  *Model answer: “This system has a sophisticated and well-developed user interface that facilitates efficient production of workflows aligned with the training and experience of end users / subject matter experts. Experience has proven that this is readily accommodated by…”* |
| 6.2 | Business Rules | As well as answering information sought in question, indicate how your system can provide a high-quality GUI, easily navigable, fully integrated, and easily updateable Business Rules cross-module. Business Rules can be implemented with ease with basic training for end users. Use of ‘current’ system screenshots to provide illustration.  *Model answer: “The system has a sophisticated and well-developed user interface that facilitates efficient production of Business Rules aligned with the training and experience of end users / subject matter experts. Experience has proven that this is readily accommodated…”* |
| 6.3 | User Interface & Usability | As well as answering information sought in question, indicate how your system can provide a high quality, out of the box user interface with consistent look and feel navigation functionality for all modules. In line with overarching requirement for comparability to current Oracle system or better e.g., use of ‘home’ page for all modules. Tailored to user privileges. Use of ‘current’ system screenshots to provide illustration.  *Model answer: “Based on customer feedback and experience of development our user interface has been designed for ease of use and aligned with usability design standards outlined below…”* |
| 6.4 | Integration | As well as answering information sought in question, indicate how your system can integrate with common market products e.g., .NET framework, JDBC. Please indicate the process to facilitate this.  *Model answer: “On other customer sites we have integrated locally their client legacy systems with the use of built in API’s…”* |
| 6.5 | Application Security and Data Access | As well as answering information sought in question, indicate how your system can provide a high level of security at application, data access and system levels. Use of ‘current’ system screenshots to illustrate the above.  *Model answer: “Security is provided via the application interface. Database roles and privileges can be implemented to restrict data access to designated Pirbright personnel…”* |
| 6.6 | Audit Trail and Forensics | As well as answering information sought in question, indicate how your system can provide full audit trail of all instances of additions, changes and deletions of all data, master files and transactions as standard in all modules and cross-module. Use of ‘current’ system screenshots to illustrate the above.  *Model answer: “Audit Trail and Forensics is provided through GUI interface and integrated with the application pertaining to…”* |
| 6.7 | Reporting | As well as answering information sought in question, indicate how your system can provide fully integrated and easily updateable reporting functionality as standard in all modules and cross-module. In line with overarching requirement for comparability to current Oracle system or better. Use of ‘current’ system screenshots to illustrate the above.  *Model answer: “The ability to use sophisticated tools for Reporting and Business Intelligence as standard…with ability for in-depth cross-module reporting in…”* |
| 6.8 | Technology Roadmap | As well as answering information sought in question, indicate current technology (e.g., HTML5) and future technology roadmap for the next 5 years.  *Model answer: “The technology roadmap for the next 5 years will consist of…”* |
| 6.9 | Agility and Ease of Use | As well as answering information sought in question, indicate how your system can be easily changed in all system areas and cross-module. Use of ‘current’ system screenshots to provide illustration.  *Model answer: “Based on customer feedback and experience of development our system has in-built agility, is designed for ease of use and aligned with usability design standards outlined below…”* |
| 6.10 | Ability to Handle Two Types of Terms and Conditions | As well as answering information sought in question, indicate how your system can cater for two types of Terms and Conditions. Use of ‘current’ system screenshots to provide illustration.  *Model answer: “The system can associate any number of employee items such as Salaries, Annual Leave, Contracts, Sick Pay, Overtime, Allowances….in any combination of...”* |
| 6.11 | Requirements Specification | We are looking for a system that provides functionality as ‘standard’ with as little coding as possible. Complete columns as listed in the Requirements Specification spreadsheet and provide:   * Indication that all 387 requirements are ‘standard’, ‘standard with config’, ‘bespoke’ or ‘not achievable’. * Indication of your ERP module associated with each of the 387 requirements. * A detailed and comprehensive explanation on capability and assumptions for each of the 387 requirements. If there is the possibility that the item may be subject to additional scoping requirements, please provide financial indicators and timelines.   *Model answer: “ID S.2.3…. is standard with config and is regarded as 4 days effort at £X per day."* |
| 6.12 | System Architecture | As well as answering information sought in question, provide a detailed system architecture diagram with extensive explanation of architectural components and pertinent assumptions. In line with overarching requirement for comparability to current Oracle system or better.  *Model answer: “Our full architecture diagram is provided below and consists of….”* |
| 6.13 | Authorisation | As well as answering information sought in question, indicate cross-module authorisation routes. In line with overarching requirement for comparability to current Oracle system or better. Use of ‘current’ system screenshots to provide illustration.  *Model answer: “The system has a fully integrated sophisticated authorisation engine that flows cross-module with role-based activity built into the application….”* |
| 6.14 | Data Migration Approach | As well as answering information sought in question, indication of an iterative approach to data migration activities which allows for a quality data migration delivery.  *Model answer: “We envisage data migration activities to go through several iterations and fully support what is required to have quality data transfer. This will be aligned with vigorous testing at a technical and UI level… data migration support is provided as standard in ‘x’ areas…provision of ‘x’ resources as standard”* |
| 6.15 | Estimated Hardware / Infrastructure Requirements | As well as answering information sought in question, indicate how your system can provide recommended specifications about likely capacity growth for a period of 5 years and accommodation of any likely performance issues.  *Model answer: “Our recommended Hardware / Infrastructure consist of…which allows for growth in….”* |
| 6.16 | Understanding of Requirements | As well as answering information sought in question, indicate how your company understands what the Institute does, our requirements with particular emphasis on grants administration (which is not provided by our current Oracle system).  *Model answer: “We have implemented ‘x’ systems for ‘x’ clients in the ‘x’ sector with a proven grants module….as illustrated in below screenshot…”* |
| 6.17 | Deliverables and Methodology | As well as answering information sought in question, indicate the proposed approach you can provide to work in partnership with the Institute in the provision of a comprehensive, iterative, and flexible delivery method.  *Model answer: “Our methodology consists of ‘x’ number of deliverables with full assistance in the delivery…facilitated by ‘x’ tools and encompassing ‘x’ resources…”* |
| 6.18 | Documentation Approach | As well as answering information sought in question, indicate the proposed approach you can provide to work in partnership with the Institute in the production of project documentation.  *Model answer: “Our documentation approach consists of ‘x’ number of deliverables with full assistance in the delivery…facilitated by ‘x’ tools and encompassing ‘x’ resources…”* |
| 6.19 | Testing / Quality Approach | As well as answering information sought in question, indicate how you can provide comprehensive testing templates for system testing and user acceptance testing. Iterations of testing needs to be aligned with requirements of data migration. Quality approach integral to project.  *Model answer: “Our testing and quality approach consists of…”* |
| 6.20 | Software Support Proposed | As well as answering information sought in question, indicate the use of portals and web user groups to facilitate logging / viewing of FAQ’s, known issues and bugs. On-line facility to download quality documents for system support, upgrades, training guides, user interface guides, technical specifications and user manuals aligned with current software version. Full Release cycle for next 3-5 years showcasing full integration.  *Model answer: “Our exceptional software support consists of a full release cycle encompassing…with portal / user groups for….”* |
| 6.21 | Warranty / Postproduction Support | As well as answering information sought in question, provide information about your SLA….  *Model answer: “Our exceptional warranty / postproduction support consists of…which is highlighted in the attached sample contract ….”* |
| 6.22 | Team Structure and Rationale | As well as answering information sought in question, indicate how functional and technical expertise will be aligned for the duration of the project. “  *Model answer: “Our consultants will be assigned for the duration of the project and have in-depth knowledge of all aspects of the system, which will aid the project in…”* |
| 6.23 | Project Resourcing | As well as answering information sought in question, indicate the provision of flexibility for project resourcing to be assigned to accommodate aggressive timeline constraints for this project. Heavy focus on technical resources and indication of number of project days assigned.  *Model answer: “Our consultants will be assigned for the duration of the project with particular emphasis on technical and infrastructure resources over ‘x’ number of days… will provide flexibility in…”* |
| 6.24 | Training Approach & Knowledge Transfer | As well as answering information sought in question, indicate how your training facilitates understanding of all areas of the system. In iterative approach to both training and technical Knowledge Transfer. Provision of training days incorporated into project and indication of areas of additional training cost. On-going training facilities post implementation.  *Model answer: “Training will be provided for all project team members on all areas of the system over the duration of the project with particular emphasis on…. training will be provided over ‘x’ number of days…”* |
| 6.25 | Project Plan | As well as answering information sought in question, indicate how your project plan can cater for simultaneous workstreams. Focus on technical and functional resources for duration of project, with indication of number of project days assigned. Indication of task, duration, work, predecessors, and resources as standard.  *Model answer: “Our project plan is based on….and consists of….”* |
| 6.26 | Disaster Recovery | As well as answering information sought in question, indicate how your use of marketplace tools and guidance for Disaster Recovery. Focus on how Disaster Recovery will be integrated and tested as part of the project.  *Model answer: “We provide assistance with the establishment, integration and testing of Disaster Recovery in a number of areas….”* |
| 6.27 | UAT | As well as answering information sought in question, indicate the provision of comprehensive UAT testing plans and scripts based on the functionality of your system. Heavy focus on technical resources and indication of number of project days assigned.  *Model answer: “Provision of resources for UAT is an integral part of our offering and consists of…”* |

**7.6 Price Criteria**

Tenderers will be required to complete the Pricing Criteria as detailed in Section 7 of the ITT document.

Tenderers will be asked to submit their Best and Final Offer (BAFO) to the Institute.

Price will be calculated based on implementation and ongoing costs over a 5-year period with the lowest price scoring the maximum points, and second and third lowest scoring a percentage thereof.

**7.7 Final Decision to Award**

Following evaluation of Tenders in accordance with the process set out in this guidance document, the Tenderer who answer yes to all mandatory questions in sections 3 and 4 and scores the most points in sections 5, 6 and 7 of the ITT documents will be awarded the contract.