



# Mini Competition

**Mini Competition against an existing Framework Agreement on behalf of UK Research and Innovation, Innovate UK**

**Subject UKRI – Data Insights, Lead Generation and Relationship Management Project**

**Sourcing reference number – UK SBS CS19037**

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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 Contracting Authorities improve efficiency, generate savings and modernise.

It is our vision to become the leading service provider for Contracting Authorities for 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.

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

Contracting Authorities who have access to our services and Contracts are detailed [here](#).

## **UK SBS 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>

## **UKRI Privacy Notice**

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

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

## Section 2 – About the Contracting Authority

### UK Research and Innovation

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

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

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

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

### Innovate UK

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

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

## Section 3 - Working with UK Research and Innovation

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 (CA) Name and address	UK Research and Innovation (UKRI), Innovate UK, Polaris House, North Star Avenue, Swindon, Wiltshire, SN2 1FL
3.2	Buyer name	Laura Goodhall
3.3	Buyer contact details	professionalservices@uksbs.co.uk
3.4	Maximum budget for the Opportunity	<b>£80,000.00 excluding VAT</b>
3.5	Process for the submission of clarifications and Bids	<b>All correspondence shall be submitted within the Emptoris e-sourcing tool. Guidance Notes to support the use of Emptoris is available <a href="#">here</a>. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.</b>

Section 3 - Timescales		
3.6	Date of Issue of Mini Competition to all Bidders	08/03/2019
3.7	Latest date/time Mini Competition clarification questions shall be received through Emptoris messaging system	18/03/2019 11:00hrs
3.8	Latest date/time Mini Competition clarification answers should be sent to all Bidders by the Buyer through Emptoris	20/03/2019
3.9	Latest date/time Mini Competition Bid shall be submitted through Emptoris	27/03/2019 11.00hrs
3.10	Anticipated selection and de selection of Bids notification date	12/04/2019
3.11	Anticipated Award Date	15/04/2019
3.12	Anticipated Contract Start Date	22/04/2019
3.13	Anticipated Contract End Date	22/08/2019
3.14	Bid Validity Period	60 Working Days
3.15	Framework and or Lot the Mini competition will be based on	Crown Commercial Service RM3774, Campaign Solutions Lot 1

## Section 4 – Specification

### Introduction

Innovate UK help high-potential businesses across the UK to access the knowledge, partners, investors, and markets they need to innovate and grow, through funding and support. To do this we need to ensure maximum awareness of our name, our purpose and how we can help innovative, high growth businesses in the UK commercialise their innovation ideas.

The UK government has set an ambitious target of increasing investment in R&D to 2.4% of GDP by 2027 and this will require a step-change in our ability to reach and influence the widest relevant audience possible with our communications.

Our current data and insights won't support that ambition fast enough.

We want to increase awareness of our offer amongst the widest possible business audience and widen the cohort of businesses [applying for our funding](https://apply-for-innovation-funding.service.gov.uk/competition/search) (<https://apply-for-innovation-funding.service.gov.uk/competition/search>) and [support](https://www.gov.uk/guidance/innovation-get-support-and-advice) (<https://www.gov.uk/guidance/innovation-get-support-and-advice>).

### Increasing reach through deeper data, insight driven decisions and lead generation activity

We see more advanced use of data as the key to evolving the sophistication of our communications activity.

We are already applying effective techniques to our email marketing via a marketing automation tool. These include running welcome campaigns, creating forms and campaign landing pages. Our open rates average 40% and our click through rates 15%.

Our database grows by around 1200 new records a month.

### Aims and Objectives

As we don't sell products we don't have the same level of analytics an ecommerce driven organisation might have, and the variables involved in a company bringing its idea to market are wide, varied and complex, and a number of players may be involved in that journey. This makes recording cause/effect a challenge.

Our assumption is that by increasing our database (our reach) of relevant UK businesses and employing a number of interventions (for example content, events, funding product advertising campaigns, PR) we can deliver the following objectives:

- help increase the propensity of UK business to innovate and help meet the R&D goal previously referenced

- widening the breadth of applications to our programmes

## **Background to the Requirement**

### **User journey and tracking**

Due to the limited tagging options on GOV.UK we struggle to track a user journey from communication (click) to registration on our grant system (IFS) and any subsequent application.

Internally we currently lose sight of customers once they register on our grant application system until the relevant competition winners are later announced.

### **Thin data makes targeting new audiences a challenge**

So overall the data we hold on our customers and prospects is thin.

Our inability to interrogate our data, in any depth, makes it difficult for us when targeting new audiences in our campaigns or tailoring messages to individual segments.

As we deal with companies from pre-employee, pre-commercialisation right up to FTSE 100 firms this issue manifests itself in us having to operate a one size fits all approach to our communications.

### **Innovate UK and family members**

We fund several organisations (Knowledge Transfer Network ([KTN](https://ktn-uk.co.uk/)) - <https://ktn-uk.co.uk/>, Enterprise Europe Network ([EEN](https://www.enterprise-europe.co.uk/)) - <https://www.enterprise-europe.co.uk/>) who also hold data and data sharing agreements are in place between us.

### **Tools and data sources**

We currently use the marketing automation tool Eloqua, primarily supporting our email marketing activity and typically run 40 email campaigns a quarter.

Data is gathered from a variety of sign up forms via GOV.UK and the email service, GOV Delivery (exclusive to GOV.UK), alongside data from our funding service IFS. [We have information on customers interests according to the Industrial Strategy Challenge Fund challenges \(http://info.innovateuk.org/InnovateUKemails/signup/ISCF-adaptive\)](http://info.innovateuk.org/InnovateUKemails/signup/ISCF-adaptive).

Our competitions team use Salesforce as their customer database, but this is not yet integrated into Eloqua or communications in general. We do, however, manually transfer data from Salesforce and IFS into the Eloqua database.

Our database of customers, prospects and stakeholders has approximately 113k records and for most of those records we have the following fields of data:

- First name, last name
- Company name
- Business location
- Industrial Strategy Challenge Fund sector preferences
- Email address

## **GDPR**

We pride ourselves on our adherence to the principals of GDPR and all our data is compliant.

## **Scope**

The proposed scope of work is as follows:

- Phase 1 – discovery, analysis and insights

It is expected that our own tools (Eloqua) and social channels would be the main distribution channels, but work may be required outside of those channels subject to recommendations (e.g. events, media content partnerships/placements).

Across the project we would anticipate the following services:

- Planning workshops
- Stakeholder interviews (London/Swindon key areas)
- Data analysis
- A variety of reports summarising key stages of the project
- A detailed phase 1 report
- Performance evaluation at each key stage of the project
- Account management of meetings/calls/contact reports

## **Requirement**

The budget for this project will be up to £80,000.00 excluding VAT

## **Discovery phase**

- A project kick-off workshop to define objectives and KPIs in detail
- A discovery and insights phase which will interrogate our data (including KTN/EEN) and convert it into insights. The insights will drive our communication planning by helping us understand more about our customers. For example:
  - What data do we have vs what do we need to meet our objectives?
  - Who are our best customers and what are their characteristics?
  - What segments can we build?
  - Can we identify any meaningful customer journey?
  - How do the audiences vary between us, KTN and EEN? (Are we all talking to the same people?)
  - What can we tell from the applications customers make?
  - What behavioural insights can we draw from this data?
  - Can we attribute a value to a customer database record?
  - How can we attribute an ROI to our communications activity?

- Stakeholder interviews
- A discovery insight report with recommendations
- A discovery phase evaluation workshop to present the report

### **Key deliverables**

Please see below defined Key Performance Indicators (KPIs) for phase 1.

- Delivery of a planning workshop
- Delivery of actionable insights that can be fed into our communications planning and content development processes
- Channel evaluation vs data acquisition performance
- A clear picture of the health of our data with gap analysis
- A clear understanding of the data owned by us, the Knowledge Transfer Network (KTN) and the Enterprise Europe Network (EEN) and the overlap/opportunities that exist across these three data domains
- Targetable customer and prospect segments for media and content planning
- Identified customer journeys with trigger points that move users along that journey

### **Timetable**

- Discovery, analysis and insights. Timing 0-4 months

### **Phase 2**

There is potential for a second phase of this project which is planned to deliver data enrichment, acquisition, lead nurturing and content development. This will be advertised as a separate opportunity where further details will be provided.

## Section 5 – Evaluation of Bids

The evaluation model below shall be used for this Mini Competition, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

To maintain a high degree of rigour in the evaluation of your bid, a process of moderation will be undertaken to ensure consistency by all evaluators.

After moderation the scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ( $5+5+6=16\div3=5.33$ ))

Pass / fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL3.12	Cyber Essentials
Commercial	SEL3.13	General Data Protection Regulations (GDPR)
Commercial	FOI1.1	Freedom of Information Exemptions
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation Check
Commercial	AW4.1	Special Terms
Price	AW5.1	Maximum Budget
Price	AW5.5	E Invoicing
Price	AW5.6	Implementation of E-Invoicing
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable bids
Quality	AW6.3	Non-Disclosure Agreement

Scoring criteria			
<b>Evaluation Justification Statement</b>			
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	10%
Quality	PROJ1.1	Data Challenges	20%
Quality	PROJ1.2	Data Enrichment	20%
Quality	PROJ1.3	Prospect acquisition plan	20%
Quality	PROJ1.4	Lead Nurturing plan	20%
Quality	PROJ1.5	Evaluation Methodology	10%

## Evaluation of criteria

### Non-Price (Quality) elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20%

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

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

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

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

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the selection question requirements with deficiencies apparent. Some useful evidence provided but response falls well short of expectations. Low probability of being a capable supplier.
60	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
80	Good response which describes their capabilities in detail which provides high levels of assurance consistent with a quality provider. The response includes a full description of techniques and measurements currently employed.
100	Response is exceptional and clearly demonstrates they are capable of meeting the requirement. No significant weaknesses noted. The response is compelling in its description of techniques and measurements currently employed, providing full assurance consistent with a quality provider.

All specific: questions will be marked based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged to determine your final score as follows: :

#### Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 40

Evaluator 3 scored your bid as 80

Evaluator 4 scored your bid as 60

Your final score will be calculated as follows  $(60+40+80+60) \div 4 = 60$

**Price elements** will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100.

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

For example - Bid 1 £100,000 scores 100,  
Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80  
Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.  
Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.  
Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.  
Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

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

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

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

## **Section 6 – Evaluation questionnaire**

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

Guidance on completion of the questionnaire is available at <http://www.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. Unless formally requested to do so by UK SBS e.g. Emptoris system failure
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission we may reject your Bid.
- 7.5 Do ensure you utilise the Emptoris messaging system to raise any clarifications to our Mini Competition. 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 and concise and ideally generic contact details; telephone numbers, e-mail 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

- 7.12 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.13 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.14 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.15 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the 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.
- 7.16 Do not contact any UK SBS staff or the Contracting Authority without the Buyers written permission or we may reject your Bid.
- 7.17 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.18 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.19 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.20 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.21 Do not exceed word counts, the additional words will not be considered.
- 7.22 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected, unless the Framework explicitly permits this.
- 7.23 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

- 7.23 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Crown Commercial Service (CCS – previously Government Procurement Service), Telephone 0345 010 3503.
- 7.24 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.25 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.26 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.27 We do not guarantee to award any Contract as a result of this procurement
- 7.28 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 7.29 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through Emptoris.
- 7.30 If you are a Consortium you must provide details of the Consortiums structure.
- 7.31 Bidders will be expected to comply with the Freedom of Information Act 2000 or your Bid will be rejected.
- 7.32 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this Mini Competition Bidders are agreeing that their Bid and Contract may be made public
- 7.33 Your bid will be valid for 60 days or your Bid will be rejected.
- 7.34 Bidders may only amend the contract terms during the clarification period 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.
- 7.35 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.
- 7.36 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.37 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Emptoris e-sourcing tool.
- 7.38 Bidders should note that if they are successful with their proposal 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 Call Off Contract to the successful Bidder.

- 7.39 All timescales are set using a 24 hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through Emptoris
- 7.40 All Central Government Departments and their Executive Agencies and Non Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, 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 Mini Competition consent to these terms as part of the competition process.

- 7.41 The Government is introducing its new Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> April 2014 to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

<https://www.gov.uk/government/publications/government-security-classifications>

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this Mini Competition to reflect any changes introduced by the GSC. In particular where this Mini Competition is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

## USEFUL INFORMATION LINKS

- [Emptoris Training Guide](#)
- [Emptoris e-sourcing tool](#)