



Invitation to Quote

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

Subject: Innovate UK Event Meeting Brokerage Tool

Sourcing Reference Number: DDaT21325

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

Registered in England and Wales as a limited company. Company Number 6330639.
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Version 7.0

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

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

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>

Enterprise Europe Network; England, Northern Ireland and Wales consortium

Through expert advice and guidance, we help ambitious businesses across England, Northern Ireland and Wales commercialise their innovations, find international business partners in Europe and beyond and grow through succeeding in new markets.

Enterprise Europe Network (EEN) helps ambitious businesses innovate and grow internationally. Jointly funded by the European Commission and Innovate UK, our experts advise and connect those looking to commercialise ideas and succeed in new markets. It brings together 600 partner organisations in more than 50 countries to help businesses innovate, grow and succeed in the European marketplace. It's the world's largest business support network, but free and simple to use with local contacts and insight across each part of the UK.

From 1 January 2015, the Enterprise Europe Network in England, Northern Ireland and Wales joined up with Innovate UK as the lead partner to become the biggest EEN consortium in the whole EU. This exciting development means that for the first time, UK small to medium-sized enterprises with big ambitions to innovate and grow can access a full suite of innovation and internationalisation support services from a single source, including a range of Innovate UK's own support.

Our network's advisors combine international business expertise with local knowledge to help businesses grow faster. With unrivalled connections to cutting edge technology, funding and trading partners; our clients make more money through successful innovation projects. In turn

this boosts the economy of UK plc by ensuring more of the solutions to today's technological and industrial challenges are commercialised here, rather than abroad.

Enterprise Europe Network helps businesses:

- find new markets for products
- find new distributors and set up improved supply chains
- access funding and finance
- promote their innovations across Europe
- find the right partners for new research and development
- gain free business advice and guidance
- take part in a wide variety of networking events
- source or license new technologies
- understand how to protect intellectual assets
- learn how they are affected by EU regulation and guidance

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, Polaris House, North Star Avenue, Swindon, SN2 1FL
3.2.	Buyer name	DDaT Procurement
3.3.	Buyer contact details	DDaTprocurement@uksbs.co.uk
3.4.	Estimated value of the Opportunity	The total budget for the four year period, including the two optional extensions, shall not exceed £104,000.00 excluding VAT. However, the Contracting Authority shall not be committed to spend up to this amount. The initial contract value for two years shall not exceed £52,000.00 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	Tuesday, 7 December 2021
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Tuesday, 14 December 2021 14.00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Thursday, 16 December 2021
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Tuesday, 21 December 2021 16.00
3.10.	Date/time Bidders should be available to deliver demonstration and sandbox environment access	Week Commencing 17 January 2022
3.11.	Anticipated notification date of successful and unsuccessful Bids	Monday, 31 January 2022
3.12.	Anticipated Contract Award date	Tuesday, 01 February 2022
3.13.	Anticipated Contract Start date	Monday, 07 February 2022
3.14.	Anticipated Contract End date (Initial)	Tuesday, 06 February 2024

3.15.	Bid Validity Period	60 Days
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Section 4 – Specification

1. Introduction

Innovate UK EDGE through its national network of 20 consortium partners runs a large number of conferences and events each year, and this is an area of increasing demand. We provide the capability for our partners to book meetings at face-to-face and virtual events (e.g. allowing attendees to book 1-on-1 sessions with the speakers after an event/webinar has finished).

At the minimum we require a tool to broker meetings, to enable continuity of this essential service for us and our partners. It could be part of a larger event platform with full virtual event hosting capability. Ideally, the solution will also be able to integrate with our Salesforce CRM for seamless data entry.

As IUK EDGE organises several high-profile events each year it is critical that these events are hosted, or at the minimum that meetings are brokered, on a GDPR / DPIA compliant platform that provides the functionality and professionalism that is expected. Therefore, enhancing IUK EDGE's reputation whilst minimising any GDPR / DPIA related risks.

Consequently, Innovate UK EDGE is looking to purchase a user-friendly tool to broker meetings which is GDPR / DPIA compliant and is provided by the supplier as Software as a Service. It could be part of a cloud-based Event Platform which is GDPR / DPIA compliant and is provided by the supplier as Software as a Service and is also available as a Managed Service should event demand require Innovate UK EDGE to secure additional resource and support. It is desirable that any platform must be able to adapt and support future event demand as it is expected that in future due to the pandemic that EDGE will increasingly host hybrid events combining virtual and physical event attendance.

2. Aims & Objectives

- to establish a cost effective and efficient purchasing / supply agreement for the supply and delivery of cloud-based event meeting brokerage tool which is GDPR / DPIA compliant and could be part of a more comprehensive events management platform.

3. Background to the Requirement

Innovate UK is a partner organisation within UK Research and Innovation: UK Research and Innovation (UKRI) brings together nine partners to create an independent organisation with a strong voice for research and innovation, and a vision to ensure the UK maintains its world-leading position in research and innovation.

Innovate UK is the UK's innovation agency:

Innovate UK works with people, companies and partner organisations to find and drive the science, technology, business models, process and commercial innovations that will grow the UK economy - delivering productivity, higher value jobs and exports. Our aim at Innovate UK is to keep the UK globally competitive in the race for future prosperity.

Innovate UK EDGE is Innovate UK's business growth support service. Its 250+ innovation and growth specialists provide small to medium sized innovative companies across the UK with advice and access to resources to accelerate their growth. Its specialists are based at 19 independent organisations in a consortium, our 'delivery partners', who also drive local marketing of our services under the Innovate UK EDGE brand.

Innovate UK EDGE has been using an on-line brokerage tool for delivery partners to organise meetings between delegates at events. At the moment the 20 delivery partners use the tool on an event-by- event basis. By procuring a single tool, Innovate UK wants to negotiate a single rate for the whole consortium. A handful of people per consortium may use the tool as administrators so we would need up to 100 seats (in practice fewer).

The consortium has been organising between 15 and 30 events each year, for which the brokerage tool has been used alongside whatever event platform solutions that the partners independently use. Between 20 and 200 people attend each of these events, although it is anticipated that most of the events will involve between 20 and 50 people. It is possible that events being organised by partners that do or do not need brokerage functionality would also be migrated to a complete events management platform should we have this greater functionality. We have not audited how many events this would entail or their requirements.

Supporting between 15 and 30 events each year (for which our current brokerage tool has been used alongside whatever event platform solutions that the partners independently use). Between 20 and 200 people per event. There should be some flex in case of any rise in virtual or hybrid events.

4. Scope

The ideal vision is an event meeting brokerage tool, at the minimum that provides crucial functionality for events:

- to any device (i.e., authorised users with any device, including Bring Your Own Device (BYOD) and home PCs).
- anywhere (to and from national and international locations).
- any time (reflecting the international collaborative working of much of the consortium partners' activities).
- to a sizeable audience, up to approximately 200 delegates who may attend any event.
- to be aware of changing needs such as hosting hybrid events which utilise both physical and virtual attendance.

We would require training to be available to our new users, ideally via manuals and remote in person training.

Please include the cost of support within your price. The tool will need to be supported for the duration of the contract, with the option of live support during the hours events may take place and general technical support (see below for functional SLA requirements).

If the tool is within a larger events management tool, we would like the option of a managed service.

The tool will need to be 'brandable' for the events we hold (i.e. our logo displayed).

The tool will need to be able to share data with our Salesforce CRM.

We will require support for ongoing maintenance and fixes, customisation and upgrades where required and a dedicated technical support service.

It would be desirable to have a managed service option for event organisation

5. Requirement

Minimum requirements for the event meeting brokerage tool are set out below:

Reporting and integration of data for our Key Performance Indicators (KPIs):
The tool must provide an output of the data needed to measure the European Commission's KPIs for brokerage events. It must also be able to integrate this data with Salesforce.com via an Application Program Interface (API).

The KPIs are:

- Number of brokerage events organised (brokerage events are organised together with EEN Network partners, either in the UK with companies from abroad visiting and meeting our local clients, or abroad in which one or more of our local clients participate, visit and meet foreign companies)
- Number of SMEs/clients in brokerage events (number of clients of Network partners who have had face-to-face meetings with foreign companies during brokerage events)
- Meetings at brokerage events (number of meetings that clients of Network partners have had with foreign companies during brokerage events)

The minimum required dataset for this is:

- Name of the brokerage events and their start date & time
- Name and email address of all prospective/actual attendees, plus their status (i.e. whether they attended the event or not)
- A list of all the meetings held at each event, the address of the clients involved (including their regions/countries) and the status of the meetings (i.e. whether they went ahead or not)

5.1 Functional requirements

The tool must as a minimum comply with all of the following functional requirements:

Mandatory:

Setup

Adding new menus and HTML pages ✓
HTML pages that can be edited online ✓
Customisation, content and branding such as PDF and logo upload ✓

Setup of registration forms

Keywords' list that can be edited online ✓
Co-operation sought list that can be edited online ✓
Co-operation profile forms (Offer, Request) ✓
B2B sessions that can be edited online by admin users (start, end, length) ✓

Booking of meetings

Online meeting booking/registration functionality ✓
Ability to select attendance/non-attendance at sessions (e.g. Morning/afternoon, Day 1, Day 2, etc.) ✓

Scheduling / Schedules

Automatic creation of schedules ✓
Online Event Feedback - Customizable ✓
Online Meeting Feedback - Customizable ✓

Integrated Mailing system

Reminders to book meetings ✓
Automated email/text messaging (e.g. meeting/event timetables) ✓

Co-organizer Management

Validation, editing profiles, booking meetings, etc. ✓
Registration email notifications - copy to co-administrators ✓
Automatic assignment of participants to co-organizers ✓

Mobile

Provide mobile app or website optimised for mobile ✓

Integration

The solution must integrate and share data with our in-house salesforce platform via an API and be capable of being white labelled with our branding.

Migration timetable to be agreed with the winning supplier at the award stage. However, the expectation is that migration is completed within one month from contract award.

Desirable

Hybrid Functionality of the event meeting booking tool i.e. enables people to register to attend events either in person or remotely via online platforms such as Zoom/Teams etc.

5.2 Non Functional requirements

Support

As a minimum, the supplier shall provide non-critical support services (Outside of a live event), via email and telephone within a 24 hour initial response time, with resolution within 48 hours of receiving a support request either via phone or email.

Provide support which meets agreed SLA response and resolution timescales within UK standard business hours (Mon – Fri 9am-5pm) and potentially ideally also for European partner working hours using the platform in the future (<+3hrs GMT)

Desirable

Online ticket system to register support requests.

Ideally, an option of live event support within the hours above for e.g. chat functionality.

Account Management

The Supplier is required to provide a named dedicated account manager/contact point for escalation purposes e.g. if issues need resolving.

Implementation – Within one month of contract being awarded/contracts signed/agreed with target go live date of 28 February 2022 latest.

Training

New and current users shall have access to training materials either online or offline such as manuals, video tutorials, online library.

Managed Service

This is not a mandatory requirement however if a managed service option is provided you may provide details of your value-added services in case these may be needed in the future.

5.3 Demonstration

As part of the ITQ process, Bidders will be required to deliver an event meeting brokerage tool demonstration to IUK EDGE evaluation panel, covering a detailed response to the demonstration criteria as detailed below in the User experience section.

Following the submission of the bids, we will evaluate the commercial, quality and price submissions and the top scoring three (3) Bidders will be invited to deliver demonstrations providing an overview of the solution to the evaluation panel and address the user experience requirements below.

User experience

The demonstration is an opportunity for the Bidder to demonstrate their event meeting brokerage tool and particularly the user experience from a delegate and event administrator perspective. UKRI would consider a good response as follows:

- provides an intuitive control hub for the event host to manage the system settings both prior to the event and in real-time enabling us to manage bookings for events efficiently

- has a configurable menu for system administrators so that event functionality can be switched on and off by 'one click' per event for example multi-lingual captions
- enables quick and easy access including "One Click Navigation" allowing a delegate to move between the areas of the system, quickly and easily without having to always return to a holding page or main menu without the need to open multiple browsers to achieve the required results.
- platform is engaging with compatibility across desktop devices (Mac/PC), tablet and smart phone services.
- accessible for both UK, European and International audiences.
- Contains an import routine which allows a system administrator to import content without further configuration or change to the content being required and meets the requirements set out in section 5.2 of the specification.

Sandbox

The Contracting Authority will require from the three top scoring suppliers a temporary access to the solution to facilitate some user testing. Therefore, please note that it is a requirement to provide temporary sandbox environment to the evaluators following the demonstrations for a short period of time (one day) and on the same week of the demonstrations taking place. The demonstration and sandbox will be evaluated by the same evaluation panel members on the same user experience criteria set out above.

Due diligence

The Contracting Authority shall reserve the right to carry out due diligence and seek clarifications on assumptions being used.

Timetable

The winning supplier is expected to implement and on-board the contracting authority to the platform within 4 weeks of contract award.

The latest day for the solution to be available to users is on 28th February 2022.

EISMEA Approved Supplier Status

As the tool will be utilised by members of the Enterprise Europe Network (EEN), there is the mandatory requirement that the selected tool must have been approved by the European Innovation Council and SMEs Executive Agency (EISMEA). The minimum requirements are set out in section 5.1 above in order to get to the approved list of tools by EISMEA.

Please note, it is the participating Bidder's responsibility to secure an approved status by EISMEA and approval evidence shall be provided for those not currently on the list of approved tools.

Website link for EISMEA can be found below. Contact details can be provided upon request.

Terms and Conditions

Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

The Contracting Authority is prepared to consider the addition of an addendum to its terms on the basis of 3rd party Software as a Service (SaaS) contractual requirements that potential bidders may be obligated to include as part of any cloud-based solution offered. If bidders have such 3rd party SaaS contractual obligations that would prevent them from bidding if they were not to be included, these should be detailed in a separate SaaS addendum terms proposal, and included in their bid submission, for the Contracting Authority's consideration during the evaluation stage of this tender. If you are submitting a proposal of this nature, please submit this as an attachment within the Delta portal against question AW4.2.

It should be noted that:

- The Contracting Authority's proposed terms are still required to be accepted in full as part of any bid submission.
- Any proposed SaaS addendum should be supplemental in nature, should be based solely on a bidder's requirement to comply with its 3rd party contractual obligations, and shall not override the Contracting Authority's core terms.
- The Contracting Authority reserves the right not to accept any proposed SaaS addendum, in full or in part, and may consider such a bid as non-compliant at its sole discretion.

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	SEL2.10	Cyber Essentials or ISO 27001
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
Price	AW5.1	Firm and Fixed Price
Price	AW5.4	E Invoicing
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
Quality	AW6.3	EISMEA Approved Supplier Status
Demonstration	PROJ1.5	Demonstration attendance
-	-	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 ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	30%
Quality	PROJ1.1	Outline Solution	25%
Quality	PROJ1.2	Hybrid Events	5%
Quality	PROJ1.3	Training and Implementation	10%
Quality	PROJ1.4	Technical Support and Account Management	10%
Demonstration and Sandbox testing	PROJ1.6	User Experience	20%

Evaluation of criteria

Non-Price elements

Each question will be judged on a score from 0 to 10, 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 0-10 score achieved will be multiplied by 20%.

Example if a Bidder scores 6 from the available 10 points this will equate to 12% by using the following calculation:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 6 = 12$$

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

The 0-10 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
1	Extremely poor response – they have completely missed the point of the question.
2	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.
4	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.
6	Response is acceptable but remains basic and could have been expanded upon. Response is sufficient but does not inspire.
8	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.

10	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.
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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 6
 Evaluator 2 scored your bid as 6
 Evaluator 3 scored your bid as 4
 Evaluator 4 scored your bid as 4
 Your final score will $(6+6+4+4) \div 4 = 5$

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: 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.

	<ul style="list-style-type: none"> 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 To confirm contents of the feedback letters to provide details of scoring and relative and proportionate feedback on the unsuccessful Bidders response in comparison with the successful Bidders response
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.uksbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

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

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. 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 for 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 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

GUIDANCE - GLOSSARY When adding new definitions always use Capital letters at the start of each word and inverted commas (") and the start and end of the definition, for example "Call Off Contract" and ensure the format of the definition is consistent throughout the document. Please also check the existing list of definitions and remove those that are not used.

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>