

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

**Subject:** The Provision of A Story Catalogue for Transforming Construction

**Sourcing Reference Number: CS20088** 

# 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 <a href="http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx">http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx</a>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

## **COMMERCIAL QUESTIONNAIRE**

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

SEL1.2	In the last three years, has any finding of unlawful discrimination been made against your organisation by an Employment Tribunal, an Employment Appeal Tribunal or any other court (or in comparable proceedings in any jurisdiction other than the UK)? And/or;  In the last three years, has your organisation had a complaint upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or a comparable body in any jurisdiction other than the UK), on grounds of alleged unlawful discrimination?
Bidder Guidance	The Bidder shall answer <b>Yes</b> or <b>No Yes</b> – Fail – Please provide details within SEL1.2.1 <b>No</b> – Pass – No response required to SEL1.2.1
	*If you have answered "yes" please provide, as an attachment to SEL1.2.1 a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.
	If the investigation upheld the complaint against your organisation, please use the attachment to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.
	You may be excluded if you are unable to demonstrate to the Contracting Authority's satisfaction that appropriate remedial action has been taken to prevent similar unlawful discrimination reoccurring.
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Yes – Fail – Please provide details within SEL1.2.1 No – Pass – No response required to SEL1.2.1

SEL1.2.1	Supporting Documentation for SEL1.2.1
Bidder Guidance	Where a bidder has responded 'Yes' to SEL1.2 please provide a supporting document attached to this question, including a summary of the nature of the investigation and an explanation of the outcome of the investigation to date.
	If the investigation upheld the complaint against your organisation, please use the attachment to explain what action (if any) you have taken to prevent unlawful discrimination from reoccurring.
	You may be excluded if you are unable to demonstrate to the Contracting Authority's satisfaction that appropriate remedial action(s) have been taken to prevent similar unlawful discrimination reoccurring.
	This information should be provided as an attachment to this question. Any bidder declaring unlawful discrimination within SEL1.2 but not providing evidence may not be considered.
Scoring	For Information Only
Criteria	
Answer	Document Upload
Туре	

SEL1.3	If you are Commercial organisation with a minimum financial turnover of £36M, please confirm that you are compliant with Section 54 of the Modern Slavery Act 2015.
Bidder Guidance	<ul> <li>The Bidder shall choose from the following options;</li> <li>A. N/A – our turnover is less than £36M</li> <li>B. Yes – We are compliant and have attached information in SEL1.3.1</li> <li>C. No (with justification) – we are not compliant but will be prior to commencement of a contract. See information attached in SEL1.3.1</li> <li>D. No – we are not and will not be compliant at the time of award of the contract</li> </ul>
	Bidders selecting option 'D' will be considered non-compliant for this Procurement.
Scoring Criteria	Mandatory Pass/ Fail
Answer Type	<ul> <li>A. N/A – our turnover is less than £36M</li> <li>B. Yes – We are compliant and have attached information in SEL1.3.1</li> <li>C. No (with justification) – we are not compliant but will be prior to commencement of a contract. See information attached in SEL1.3.1</li> <li>D. No – we are not and will not be compliant at the time of award of the contract</li> </ul>

SEL1.3.1	Supporting Documentation for SEL1.3
Bidder guidance	Where a bidder has responded 'Yes' or 'No (with justification)' to SEL1.3, please provide your supporting information as an attachment.
	Any bidder declaring they are compliant within SEL1.3 but not providing evidence may not be considered.
Scoring	For information only

Criteria	
Answer	Document upload
Туре	
SEL2.10	Cyber Essentials has been mandatory for central government contracts advertised after 1 October 2014 which involve handling personal information and providing certain ICT products and services. It is mandatory for bidders to demonstrate that they meet the technical requirements prescribed by Cyber Essentials for those contracts featuring any of the characteristics set out below in bidders' guidance.  Cyber Essentials is for all organisations, of all sizes, and in all sectors. This is not limited to companies in the private sector, but is also applicable to universities, charities, and public sector organisations.
	Further details are available at: <a href="https://www.cyberstreetwise.com/cyberessentials/">https://www.cyberstreetwise.com/cyberessentials/</a>
Bidder Guidance	Any of the following but not limited to typical characteristics, will necessitate the mandatory requirement for bidders to have an up to date Cyber Essentials Certificate:
	<ul> <li>i) Where personal information of citizens, such as home addresses, bank details, or payment information is handled by a supplier.</li> <li>ii) Where personal information of Government employees, Ministers and Special Advisors such as payroll, travel booking, or expenses information is handled by a supplier.</li> <li>iii) Where ICT systems and services are supplied which are designed to store, or process, data at the OFFICIAL level of the Government Protective Marking scheme.</li> <li>iv) Contracts that are considered by the Contracting Authority to be sensitive in character</li> </ul>
	Bidders can answer
	Yes – the Cyber Essential Certificate is currently in place
	Intend – the Cyber Essential Certificate is not in place and we intend to have it in place for commencement of the contract.
	<b>No</b> – the Cyber Essential Certificate is not in place and we have no intention of having it in place for commencement of the contract
	A response of 'Yes' or 'Intend' will result in a pass and a response of 'No' will result in a fail against this question.
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Multiple Choice Dropdown  Yes – the Cyber Essential Certificate is currently in place Intend – the Cyber Essential Certificate is not in place and we intend to have it in place for commencement of the contract. No – the Cyber Essential Certificate is not in place and we have no intention

	of having it in place for commencement of the contract
FOI1.1	FREEDOM OF INFORMATION ACT 2000 (FOIA) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR)  Information provided in the course of the procurement process may be disclosed under Freedom of Information Act 2000 or Environmental
	Information Regulations 2004.
	Please note that some of the information provided may be protected under the FOIA exemptions and EIR exceptions. More information on applying the exemptions or exceptions can be found under the information Commissioners Office (ICO) website <a href="http://ico.org.uk">http://ico.org.uk</a>
	Please confirm you have been informed that information provided under this Bid may be disclosed under the FOIA and EIR and agree to it being published.
Bidder Guidance	The Bidder shall answer <b>Yes</b> or <b>No</b>
	<b>Yes</b> – Pass <b>No</b> – Fail
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Yes – Pass No – Fail
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FOI1.2	FREEDOM OF INFORMATION ACT 2000 AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 EXEMPTIONS
	Please complete this section <u>only</u> if you have agreed for your information to be disclosed under the FOIA or EIR in FOI1.1 If you have not agreed for your information to be disclosed under the FOIA or EIR in Question FOI1.1 please complete each field 'N/A' (not applicable)
	If you have agreed for your information to be disclosed under the FOIA or EIR

FOI1.2	FREEDOM OF INFORMATION ACT 2000 AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 EXEMPTIONS  Please complete this section only if you have agreed for your information to be disclosed under the FOIA or EIR in FOI1.1 If you have not agreed for your information to be disclosed under the FOIA or EIR in Question FOI1.1 please complete each field 'N/A' (not applicable)
	If you have agreed for your information to be disclosed under the FOIA or EIR in Question FOI1.1 please tell us what exemptions or exceptions may apply to your information and why?
Bidder Guidance	The Bidder shall provide details of their proposed exemptions/exception in the fields below.
	The Bidder shall note that if the Contracting Authority believes that the suggested exemptions or exceptions have not been applied properly, the Contracting Authority will disclose the requested information unless another exemption or exception can be applied by the Contracting Authority.
	Be aware that by completing FOI1.1 and answering 'yes' you have agreed for the Contracting Authority to disclose the provided information under the Freedom of Information Act 2000 or Environmental Information Regulation 2004; therefore, you will not be approached for consent.
	Bidders are required to complete the table fields below, highlighting your proposed exemptions to this question.

	If you are not relying on any exemptions or exceptions, please complete each field 'N/A' (not applicable).
Scoring Criteria	For information only
Answer Type	Confidential Information and justification for exemption/exception under FOI Act
	Large Text Field
	Commercially sensitive information and justification for exemption/exception under FOI Act
	Large Text Field

#### AW1.1 FORM OF BID

I declare that to the best of my knowledge the answers submitted in this ITQ are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to bid for the Contracting Authority's requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may reject this ITQ if there is a failure to answer all relevant questions fully or if I provide false/misleading information.

I understand that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by the Contracting Authority, including the ITQ, and any contract entered into by the Contracting Authority or its customers with its preferred supplier once the procurement is complete.

By submitting a response to this ITQ I agree that our participation may be made public.

I understand that the answers given in this response will not be published on the web site (but may fall to be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004).

By submitting a response to this ITQ I agree and accept the justification for the Contracting Authority's evaluation criteria.

By submitting a response to this ITQ I agreed and accept that the Contracting Authority reserves the right to change without notice the procedure for awarding the Contract, to reject any or all bids for the Contract, to stop the process and not award the Contract (in whole or in part) at any time without any liability on its part.

By submitting a response to this ITQ I agree and accept that nothing in this process is intended to form any express or implied contractual relationship between the Parties unless and until a Contract is awarded. The Contracting Authority is not liable for any costs resulting from cancellation of this process nor any costs incurred by Bidders taking part in this procurement process.

	I understand that where sourcing documents issued by the Contracting Authority or contracts with its suppliers fall to be disclosed the Contracting Authority will redact them as it thinks necessary, having regard (inter alia) to the exemptions/exceptions in the FOIA or EIR.
Bidder	The Bidder shall answer <b>Yes</b> or <b>No</b>
Guidance	
	Yes – Pass
	No - Fail
Scoring	Mandatory Pass / Fail
Criteria	
Answer	Yes – Pass
Type	No – Fail

#### AW1.3 CERTIFICATE OF BONA FIDE BID

The essence of procurement is that the customer shall receive bona fide competitive Bids, from all those Bidding. In recognition of this principle, we certify that this is a bona fide Bid, intended to be competitive and that we have not fixed or adjusted the amount of Bid by or under or in accordance with any agreement with any other person.

We also certify that we have not done, and we undertake that we will not do at any time before the hour and date specified for the return of this Bid any of the following:

- (a) Communicate to a person other than the person calling for these Bids the amount or approximate amount of the proposed Bid, except where the disclosure, in confidence, of the approximate amount of the Bid was necessary to obtain insurance premium quotations for the preparation of the Bid:
- (b) Enter into any agreement or arrangement with any other person that he shall refrain from bidding or as to the amount of any Bid to be submitted;
- (c) Offer to pay or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or have caused to be done in relation to any other Bid or proposed Bid for the said supply / service any act or thing of the sort described above.

In this certificate, the word "person" includes any persons and anybody or association, corporate or unincorporated, and any "agreement or arrangement" includes any such transaction, formal or informal, and whether legally binding or not.

We acknowledge that the Contracting Authority will be entitled to cancel the contract and to recover from us the amount of any loss resulting from such cancellation if we or our representatives (whether with our without our knowledge) shall have practiced collusion in Bidding for this contract or any other contract with the Contracting Authority or shall employ any corrupt or illegal practices either in the obtaining or execution of this contract or any other contract with the Contracting Authority.

Bidder	We agree that the Contracting Authority may disclose the Bidders information / documentation (submitted to the Contracting Authority during this Procurement) more widely within Government for the purpose of ensuring effective cross-Government procurement processes, including value for money and related purposes.  The Bidder shall answer Yes or No
Guidance	The Blader shall allower 100 or 110
	Yes – Pass
	No – Fail
Scoring Criteria	Mandatory Pass / Fail
Answer	Yes – Pass
Type	No – Fail

AW3.1	In the event of a Bidder successfully providing the most advantageous offer to the Contracting Authority against a procurement requirement, the Bidder is expected to provide an answer to the validation check that can be seen within Stage One: Overview Section prior to the award of any Contract.  If the Bidder fails to meet the Contracting Authority's expectations, we reserve the right to not award the Contract to the relevant Bidder and either award to the Bidder with the second most advantageous response or run a new procurement.
Bidder Guidance	The Bidder is not required to complete the validation check at this stage but will be required to respond to the questions in the event of providing the most advantageous offer to the Contracting Authority's against a procurement requirement.  Yes – Pass No – Fail
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<b>Yes</b> – Pass <b>No</b> – Fail

AW4.1	Please confirm your acceptance of the Contract Terms that can be found within the Stage One: Overview section.
Bidder Guidance	The Bidder shall answer <b>Yes, No with justification</b> or <b>No</b>
	Yes, we accept the terms and condition in their entirety – Pass
	<b>No with justification</b> – Pass. Complete the document upload attached to AW4.2 with details of what amounts to a valid justification.
	No – Fail
	For absolute clarity should a bidder select 'Yes' or 'No' you are <b>not</b> required to respond to AW4.2, however if you select 'No with Justification' you will be required to complete AW4.2 in order to be considered.
Scoring Criteria	Mandatory Pass / Fail

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Answer	Multiple Choice Dropdown
Туре	
	<b>Yes</b> , we accept the terms and condition in their entirety – Pass
	No with justification – Pass. Complete the document upload attached to
	AW4.2 with details of what amounts to a valid justification.
	No – Fail
AW4.2	Where a Bidder has answered question AW4.1 with 'No with justification' they must detail the justification and the proposed change to the clause.
	Where a bidder has responded 'Yes' or 'No' to AW4.1 you are not required to respond to this question.
Bidder Guidance	A justification for not accepting a specific clause or series of clauses from the attached Contract Terms is that the Bidder would be in breach of legal requirements or statutory regulations by complying with that clause or series of clauses (i.e. for the avoidance of doubt, being unable to comply with a clause or series of clauses because of an internal policy reason will not be considered to be a justification for a legal requirement or statutory regulation).
	<ul> <li>Where the Bidder has answered question AW4.1 as "no with justification", the Bidder shall provide a Contract mark-up utilising track changes detailing the relevant clause, the proposed changes to the clause and the justification for the changes. In this case, the Bidder shall score a pass if (but only if) the Contracting Authority considers both the following requirements are satisfied: <ul> <li>the reasons stated as justifying the Bidder's statement that it cannot accept the Contract Terms due to legal requirements or statutory regulations are valid; and</li> <li>the changes submitted do not create significant risk for the Contracting Authority and are reasonably necessary and proportionate to ensure the Bidder complies with the legal requirements and statutory regulations.</li> </ul> </li> </ul>
	In the event of a Bidder answering Yes or No to Question AW4.1 and then providing a proposed mark-up, rejection of a clause or a justification for a change then the response will be a Fail.
	Any bidder selecting 'No with Justification' to AW4.1 and failing to upload an attachment to this question detailing the information above may not be considered further.
	Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, should be raised as a formal clarification during the permitted clarification period.
Scoring Criteria	Mandatory Pass / Fail
Answer	Document Upload
Typo	•

Туре

## PRICE QUESTIONNAIRE

AW5.1	Maximum Budget
	As stated within the tender documents, the maximum overall budget for this requirement will be £160,000.00 excluding VAT.
	Up to £100,000.00 ex VAT for the initial term of the contract Up to £60,000.00 ex VAT has been allocated for the optional further 1 year of the contract
	This should include all costs relating to the projects as well as Travel, Subsistence and Overhead costs.
	Please confirm that your final price submitted within AW5.2 will fall within this budget.
	Any bidder selecting 'No' may not be considered further for this requirement.
Bidder Guidance	The Bidder shall answer <b>Yes</b> or <b>No</b>
	Yes – Pass
	No – Fail
Scoring Criteria	Mandatory Pass / Fail
Answer	Yes - Pass
Type	No - Fail

AW5.2	Bidders are required to complete the Excel Pricing Schedule attached in the Document Upload attachments.  All prices shall be in £ GBP and exclusive of VAT.  All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.
Bidder Guidance	Bidders shall confirm they have completed the Pricing Schedule.  The scoring methodology for this question shall be:  The lowest price for a response which meets the pass criteria shall score 100.
	All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.  Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.
	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.
	The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The lowest score possible is 0.
	For example, assuming the lowest bid is £100,000.
	Bid Price £100,000 Differential to the lowest price which meets mandatory pass criteria ('Differential') 0 Score 100
	Bid price - £120,000 Differential - 20% Score - 80 Bid price - £140,000 Differential - 40% Score - 60 Bid Price - £150,000 Differential - 50% Score - 50
	Bid Price - £175,000 Differential - 75% Score - 25
	Bid Price - £200,000 Differential - 100% Score - 0
	Bid Price - £300,000 Differential - 200% Score - 0
Scoring Criteria	Maximum Marks 30%
Answer Type	Price Document Upload

## **QUALITY QUESTIONNAIRE**

AW6.1	Please confirm your compliance to the requirements of Section 4 Specification
Bidder	The Bidder shall answer <b>Yes</b> or <b>No</b>
Guidance	
	Yes – Pass
	No – Fail
Scoring	Mandatory Pass / Fail
Criteria	
Answer	Yes – Pass
Type	No – Fail

AW6.2	Variable Bids
	The Contracting Authority shall not accept variable bids as part of this Procurement. The criteria in regard to variable bids for this Procurement is outlined below.
Bidder Guidance	The Bidder shall answer <b>Yes</b> or <b>No</b>
	Yes - We have provided a variable bid only – Fail No - We have chosen to only offer a main bid and have not chosen to provide an alternative bid submission – Pass
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Yes - We have provided a variable bid only – Fail No - We have chosen to only offer a main bid and have not chosen to provide an alternative bid submission – Pass

line your proposed methodology and project plan ensuring the key , outlined in the specification are met.
,
e asked to provide their proposed methodology, project plan and to achieving the objectives and delivering the outputs highlighted ion 4 - specification of the ITQ document, ensuring that the key outlined in the specification are met.
r response you must ensure that you have provided sufficient detail trate how you will achieve the programme and deliver each element both the bidders proposed methodology and the contracting strict timelines.
ould include how the project will be monitored to ensure it is n terms of quality, timeliness and cost.
num your response should cover;
etailed timetable for carrying out the work based on the proposed broach and method
hlight key milestones and deadlines, including suggested meetings by progress reports.  y dates of the Contract

	<ul> <li>Key dates for client decisions and approvals</li> <li>Continuous development</li> <li>Training/workshop programme and timetable</li> </ul>
	An attachment is allowed for this question
	This question is limited to two sides of A4. Any additional content provided beyond this will not be considered or scored during the evaluation process. Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm.
Scoring Criteria	Scoring shall be based on 0-100 scoring methodology.  Maximum Mark: 15%
Answer Type	Document Upload

PROJ1.2	Catalogue Approach
	Please outline your proposed approach to the collection, secure storage, integration and management of the data/information/stories in a manner that allows for timely and relevant analysis.
Bidder Guidance	Bidders should outline how they will collect, securely store, integrate and manage the data/ information/stories in a manner that allows for timely and relevant analysis.
	Please also provide details on how you plan to address the project in need of data/information/stories support, how to ensure compliance with relevant security to ensure controlled access, and how to ensure the necessary data/information/stories formats and analyses are achieved.
	An attachment is allowed for this question.
	Please attach your answer as a pdf document limited to Four sides of A4 – Any additional content provided beyond this will not be considered or scored during the evaluation process. Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm
Scoring Criteria	Scoring shall be based on 0-100 scoring methodology.
Cillella	Maximum Mark: 30%
Answer Type	Document Upload

PROJ1.3	Risk Management
	Please identify key risks to the project and how these risks will be mitigated.
	Bidders should include how the project will be monitored to ensure it is
	delivered in terms of quality, timeliness and cost.
Bidder	Bidders are asked to provide details of all key risks that could affect the
Guidance	

	delivery of this project as per the specification.
	As a minimum your response should include:
	<ul> <li>Demonstrate your tools and processes to mitigate risk in this project.</li> <li>Identification of envisaged key risks to the project</li> </ul>
	An attachment is allowed for this question.
	Please attach your answer as a pdf document limited to two sides of A4 – Any additional content provided beyond this will not be considered or scored during the evaluation process. Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm
Scoring Criteria	Scoring shall be based on 0-100 scoring methodology.
	Maximum Mark: 10%
Answer	Document Upload
Туре	

PROJ1.4	Project Team and Capability to Deliver
	Please demonstrate the skills and expertise of your proposed project team
	that will be essential to the successful delivery of this project.
Bidder Guidance	Bidders are asked to demonstrate their skills and expertise of their proposed project team, that will be essential to the successful delivery of this project.
	Within your response please provide a methodology as to how you will
	maintain your ability to deliver these through the lifetime of the project.
	As a minimum we require your response to contain the following information:
	Please identify the key roles within the team, and what skills and expertise they would bring to this project
	<ul><li>Cover for staff absence</li><li>Dissemination of information/data/story collection</li></ul>
	<ul> <li>Procedures and practises</li> </ul>
	External Support needed:
	<ul> <li>Please provide details of any support that would be needed and from whom, in order to undertake and complete this project.</li> </ul>
	An attachment is allowed for this question
	Please attach your answer as a pdf document limited to two sides of A4 – <b>Any</b> additional content provided beyond this will not be considered or scored
	during the evaluation process. Responses should be submitted in Font Arial
	11pt using single line spacing. Please use the Normal margin setting 2.54cm.
Scoring	Scoring shall be based on 0-100 scoring methodology.
Criteria	Maximum Mark: 15%