



Invitation to Quote

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

Subject: Research Leadership in the Social Sciences: Rapid Evidence Review

Sourcing Reference Number: PS21018

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

Registered in England and Wales as a limited company. Company Number 6330639.
Registered Office Polaris House, North Star Avenue, Swindon, Wiltshire SN2 1FF
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Version 5.0

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

Economic and Social Research Council (ESRC)

ESRC is the UK's largest funder of research on the social and economic questions facing us today. Their research shapes public policy and contributes to making the economy more competitive, as well as giving people a better understanding of 21st century society.

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

Section 3 - Working with the Contracting Authority.

In this section you will find details of your Procurement contact point and the timescales relating to this opportunity.

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	UK Research and Innovation (ESRC), Polaris House, Swindon, SN2 1FL
3.2.	Buyer name	Matthew Alonso (UK SBS)
3.3.	Buyer contact details	Research@uksbs.co.uk
3.4.	Maximum Budget	£40,000.00 (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	Thursday, 29 April 2021 Contracts Finder
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Thursday, 06 May 2021 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Monday, 10 May 2021 11:00
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Monday, 17 May 2021 14:00
3.10.	Clarifications IF required	Monday, 24 May 2021 14:00
3.11.	Anticipated notification date of successful and unsuccessful Bids	Friday, 28 May 2021 14:00
3.12.	Anticipated Contract Award date	Friday, 28 May 2021
3.13.	Anticipated Contract Start date	Tuesday, 01 June 2021
3.14.	Anticipated Contract End date	Thursday, 30 September 2021
3.15.	Bid Validity Period	90 Days

Section 4 – Specification

1. Introduction

Developing social science leadership capability is one of ESRC's strategic priorities. Our focus on developing leadership capability reflects recognition of the changing funding landscape and a shift towards increasing numbers of larger, collaborative, and challenge-orientated projects that reach across disciplinary, sectoral, and international boundaries. This requires us to revisit the capabilities we are developing in our researchers and ensure that we have a strong pipeline able to work within and lead these types of major projects.

On 10 June 2020, ESRC published [Fit for the Future: Research Leadership Matters \(PDF, 2.7Mb\)](#), a report on research leadership in the social sciences by Professor Matthew Flinders. In considering how we move forward with the outcomes of the report, we have identified two evidence gaps which we believe are critical to address. A clear articulation is required of the skills, attributes and experience that facilitate effective leadership in a research environment as well as an appraisal of the interventions that are most effective in developing the identified qualities needed across the life course.

To help address these gaps, we are commissioning a Rapid Evidence Assessment (REA) to consider:

1. What are the skills, attributes and experience that facilitate effective leadership at the different stages in a research career?
2. 'What works' in terms of facilitating the skills, attributes and experience that is required at each career stage in the social sciences and where is the evidence-base?

Teams bidding for the work must have a strong commitment to and understanding of leadership development; its potential application in the social sciences; and expertise in undertaking reviews of this kind. We recognise consortium bids can enable bidders to compile teams with the breadth of expertise required and such bids are permitted.

Together with further internal work being undertaken by ESRC, this REA will enable us to learn from leadership practices in other disciplines and sectors and build a solid foundational understanding of effective research leadership and a more detailed appreciation of how this is best nurtured across the life course. The report will also provide an important foundation to cross UKRI work in this area. This REA will need to be completed by the end of September 2021. A budget of £40k (excluding VAT) is available and consortium bids are welcomed.

2. Background

Our focus on developing leadership capability reflects recognition of the changing funding landscape and a shift towards increasing numbers of larger, collaborative, and challenge-orientated projects that reach across disciplinary, sectoral, and international boundaries. This requires us to revisit the capabilities we are developing in our researchers and ensure that we have a strong pipeline able to work within and lead these types of major projects.

The Flinders report pointed to the importance of understanding leadership capability across

the life course and of the need to develop targeted interventions to respond to differing needs at the different career stages. In setting the parameters for this further phase of work, the life course approach is central to the way in which we conceptualise research leadership, along with the following which are presented as reference points within the Flinders report (p13):

- i. The activity of supporting and facilitating the production of research in an inclusive manner that maximises the scientific quality and social impact(s) of that endeavour.
- ii. Relates to both individual development (self-leadership) but more commonly to the contribution of an individual to supporting and nurturing the research careers of others.
- iii. May refer to activities in relation to a specific project or programme of research, or to broader ambassadorial roles within research funding organisations, learned societies or academies.
- iv. Research leadership occurs in a number organisational and professional contexts and is in no way restricted to academe.

More specifically in relation to the social science research community, Flinders describes research leadership as including ‘ a capacity to enthuse, ignite and sustain an intellectual vision that is inclusive, flexible and open to challenge. It also involves an ability to take that vision beyond academe in order to demonstrate the social relevance of that research, and therefore why the social sciences matter. Research leadership is therefore increasingly tied to notions of innovation, entrepreneurship, and ambassadorial skills.

Recent ESRC Activity

The ‘Fit for the Future’ project was announced in 2018 in the light of this rapid change, recognising a specific leadership challenge for the social sciences. Designing, leading, and delivering, and simply working within large, complex ‘team-science’ projects demand skills that have often not been required or incentivised within the social sciences. This leadership challenge has implications for how the social sciences think about researcher development more generally; how it nurtures and sustains intellectual curiosity and creativity throughout the full professional journey; how it cultivates and rewards ambassadors for the social sciences and how it might combine a fresh approach to talent management and building research leadership capacity with UKRI commitments in relation to inclusion, diversity and equality.

The final [report](#) by Professor Matthew Flinders entitled ‘Research Leadership Matters’ was published on 10 June 2020, alongside an [ESRC response](#). While research leadership is clearly a key component, we also believe that it should be situated within a wider context of researcher and talent development so that a full picture of the skills and competencies needed throughout the pipeline are understood. Much of Professor Flinders’ report highlights issues concerning the wider research environment and for instance, points to the need for researchers who can develop open and inclusive research cultures and promote equitable working practices. These are central features of the renewed UKRI vision and mission, relevant to the refreshed Researcher Development Concordat and Technician’s Commitment which foreground the importance of valuing researchers and those in research-related roles at all career stages. This also chimes with Wellcome’s work on Research Culture and the R&D Roadmap emphasis on inspiring and enabling talented

people and teams.

Flowing from the UKRI/ESRC commitment to supporting an inclusive research environment, an explicit and concerted attempt to engage with long- standing issues in relation to equality, diversity and inclusion will be a core component of any new approach to nurturing research leadership.

We acknowledge the wider applicability of many of the twelve recommendations beyond the social sciences and the need to explore areas of mutual interest and opportunities for collaborative working with UKRI as part of our Talent Strategy. To this end, we are seeking to take this work forward in a way which meets the needs of the social science community, whilst also considering elements which could be scaled and delivered at a UKRI level (for instance, we are feeding in to the preparation of a cross-UKRI workshop to explore how leadership can be developed as part of the Talent Strategy).

The final report points to the twelve recommendations as strengthening our position and enabling a more systematic development and support for research leadership. Not all recommendations are for ESRC to lead on and as currently described, they are a mixture of strategic ambitions and project deliverables. Rather than develop specific actions in relation to each of them, we intend to take a holistic approach to the way in which we think about and approach research leadership and recognise the ways in which effective leadership is both dependant on and shapes other aspects of the research eco-system. We will take this work and use it as a platform: for more clearly articulating what effective leadership in a research environment looks like within the social sciences (and more broadly) and at differing stages in the life course; to develop appropriate delivery mechanisms for strengthening it; and to determine aspects that will benefit from being progressed in partnership with other disciplines and other bodies.

Next steps

In considering how we move forward with the outcomes of the report, we have identified two evidence gaps which we believe are critical to address:

- A clear articulation of the skills, attributes and experience that facilitate effective leadership in a research environment and how this relates to different stages of a research career and;
- An appraisal of 'What works' in terms of facilitating the skills, attributes and experience that is required for effective leadership in a research environment at each career stage.

We will fill these gaps by:

- Commissioning a Rapid Evidence Review, the subject of this ITT;
- Undertaking an internal review of our own investments to examine how leadership is currently presented and described, and also what mechanisms exist to enhance it.
- Holding a the series of short workshops with colleagues internally to hear perceptions about the qualities and characteristics of effective leadership in a

research environment, where and how we currently promote these, and any shortfalls or gaps in our existing practice.

Taken together, the commissioned REA and internal pieces of work will enable us to have a solid foundational understanding of effective leadership in a research environment and a more detailed appreciation of how this is best nurtured across the life course.

3. Aims and Objectives of the Project

We want to build a foundation of evidence which will enable us to determine how we articulate our expectations of research leadership across the life course; how we strengthen and embed this across the organisation; and how we further engage with the sector. As well as providing the grounding for how we engage externally, this stronger evidence-base will sharpen our internal focus on leadership when commissioning new initiatives and allow us to embed good practice within our peer review and evaluation processes.

There is limited evidence of research leadership in the social sciences and consequently we want to look at other disciplines and sectors to find out what others have done that we can learn from and may have applicability in the social sciences. We are well-aware of the sizable body of material that exists and the investment that other organisations and sectors have put into their approaches to leadership development (e.g. [NHS Leadership Academy](#)). In order to strengthen our understanding and allow us to learn from what has already proved effective, we are commissioning a team to undertake a Rapid Evidence Assessment, the aim of which is to synthesise the full breadth of evidence available from academic and grey literature from other sectors (noting in particular bodies such as the NHS, AdvanceHE and Vitae) and provide recommendations to the following questions:

1. What should effective leadership look like at different career stages in a research environment?
 - a. Definition: How is effective leadership defined in other sectors and how applicable are these definitions to all career stages, particularly within the social science research community.
 - b. Expectations: How do existing leadership and talent development frameworks in HE, public and private sectors characterise the requirements for and behaviours of leadership and what can we learn from them.
 - c. Applicability to the social science research community: To what extent and in what ways do the recommendations from the Flinders report feature within other articulations of effective leadership in a research environment.
2. What interventions have been most effective in developing the skills and experience required for effective leadership across sectors at different career stages and what can we learn from what works?
 - a. Effectiveness of existing interventions: The [Fit for the Future - Leadership and Social Sciences report](#) recommends a number of ways to strengthen leadership skills, such as mentoring, interdisciplinarity, team-based research and mobility schemes, but what can be learnt from existing initiatives? For example:

- i. What exists that promotes mobility (sectoral and disciplinary) and is there evidence of effectiveness;
 - ii. How is interdisciplinarity currently promoted across the life course, what are the barriers and what existing evidence can we make use of;
 - iii. How do different funders reward and recognise team-based research;
- b. Applicability: in what areas can the learning be applied to address the identified needs in the social science research community at different stages across the life course.

In addition to the evidence gathered through the REA, we will also share with the successful team the internal review of our own investments, funding opportunities and policies. This is expected to be completed in May 2021.

The REA will be used to inform our future practice. The evidence will be used by a specially convened expert group to identify changes to current policy and guidance as well as prioritise targeted interventions needed across career stages. Our response will need to consider the different dimensions of research leadership e.g. leading large complex grants; translational leadership for those delivering impact outside academia; leading interdisciplinary teams. The report will also inform investment in research leadership more broadly across UKRI. It will therefore be valuable to understand where conclusions and implications for practice can be applied generically to research careers and where they are specific to careers in the social sciences, including the reasons for this.

What is an REA¹?

A Rapid Evidence Assessment (REA) is a type of evidence summary that can inform practice. It applies the same methodology as a Systematic Review, but aspects of the search may be limited to produce a quicker result:

- Searching: consulting a limited number of databases and excluding unpublished research.
- Inclusion: only including specific research designs (e.g. meta-analyses or controlled studies)
- Data Extraction: only extracting a limited amount of key data, such as year, population, sector, study design, sample size, moderators/mediators, main findings, and effect sizes.
- Critical Appraisal: limiting quality appraisal to methodological appropriateness and quality.

4. Proposed approach

¹ <https://cebma.org/faq/what-is-an-rea/>

The REA should aim to answer the questions outlined in section two. Bids should set out how the project will be undertaken, and in particular identify:

- The scope of the REA, including any proposed parameters that will be applied;
- What literature will be reviewed
- The search approach to be applied
- The study selection process to be used
- The approximate number of documents you expect to include in the review
- How information from selected studies will be screened, sorted, and reviewed;

Bids should explicitly state how the proposed approach will address the questions in section 2 and explain how the work will deliver robust results and useful insights. Key to this will be designing search strategy that captures the full breadth of literature available and having in place effective strategies to assess its relevance and value to the REA.

We propose the following parameters for the review:

- restricting the review to publications in English
- including material published in the last 10 years (since 2010)
- inclusion of both academic literature and grey literature
- using a range of databases including Web of Science, ERIC, Google Scholar, and the University Education e-resource
- recording the number of returned results for each search criteria carried out and limiting the number of results to the first ten pages
- creating a bibliographic database to include commentary about the rationale for inclusion of sources in the review (but no expectation to justify each exclusion)

ESRC will need to approve that the parameters for the REA are acceptable.

In formulating your approach, it is important to remember that leadership is not phased or linear and might better be described as a web of skills. Researchers need to be able to access support at the career stage they find themselves at and it cannot be assumed they have followed a common path to arrive there.

5. Deliverables

Outputs

The outcomes of the REA should be presented in a formal report to be submitted to ESRC by September 2021. The report should include the following chapters:

- Executive summary
- Introduction, including REA questions
- Background
- Methodology
 - Inclusion Criteria
 - Search Strategy
 - Study Selection
 - Data Extraction
- Analysis
 - Critical Appraisal
 - Results
 - Synthesis
 - Limitations
- Conclusions
- Implications for Practice

Timetable

Key dates are as follows:

- Specification advertised – 29th April 2021
- Deadline for bids – 17th May 2021
- Preferred bidder identified – w/c 24th May 2021
- Team appointed/work starts – 1st June 2021
- Draft report due – 3rd September 2021
- Final report due – 29th September 2021
- Present findings to the Task and Finish Group – Autumn 2021

Expectations of the team

Bidders must detail how they have the necessary subject and methodological expertise and experience to undertake this project, explicitly linking how the skills of the project team will enable the successful implementation of their proposed approach. Collectively the team must have a strong commitment to and understanding of leadership development; its potential application in the social sciences; and expertise in undertaking reviews of this kind. The bid must demonstrate the appointed team has the competencies required to effectively deliver the project. We recognise consortium bids can enable bidders to compile of teams with the breadth of expertise required. Such bids are permitted.

Enough time will need to be committed by individuals in the team to deliver the programme of work proposed. Roles, responsibilities, and time commitments of team members need to be set out clearly in bids.

Working with ESRC

Close working between the ESRC Skills and Methods and the appointed team will be vital throughout the work. Progress reviews every 2 weeks will take place via email, phone, or video conferencing.

ESRC will be establishing a small Task and Finish Group to support the delivery of their wider Leadership Development programme of activity, of which this project is one part. The successful bidder will be invited to present their report to the Group in autumn/winter 2021.

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.

Section 5 – Evaluation model

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

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

The evaluation team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

The evaluation and if required team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required. After evaluation and if required moderation scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ($5+5+6=16 \div 3 = 5.33$))

Pass / Fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Commercial	SEL2.12	General Data Protection Regulations (GDPR) Act and the Data Protection Act 2018
Commercial	FOI1.1	Freedom of Information
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Maximum Budget
Price	AW5.4	E Invoicing
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
-	-	Invitation to Quote – received on time within e-sourcing tool
In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.		

Scoring criteria

Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings/scoring mechanism detailed within this 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	10%
Quality	PROJ1.1	Approach	30%
Quality	PROJ1.2	Staff to Deliver	20%
Quality	PROJ1.3	Understanding the Environment	30%
Quality	PROJ1.4	Project Plan, Timescales and Risk	10%

Evaluation of criteria

Non-Price elements

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

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

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

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

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

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

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the 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 reviewed in an evaluator meeting, once the individual evaluations are complete and a consensus score will be agreed to determine your final score

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: $\text{Score/Total Points multiplied by 50}$ ($80/100 \times 50 = 40$)

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

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 not 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.