

Invitation to Quote

**Invitation to Quote (ITQ) on behalf of UK Research and Innovation
(UKRI) – National Environment Research Council (NERC)**

Subject: Healthy Environment Public Dialogue

Sourcing Reference Number: CR20103

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

Registered in England and Wales as a limited company. Company Number 6330639.
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VAT registration GB618 3673 25
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Version 4.0

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

Natural Environment Research Council (NERC)

NERC is the driving force of investment in environmental science. Their leading research, skills and infrastructure help solve major issues and bring benefits to the UK, such as affordable clean energy, air pollution, and resilience of our infrastructure.

<https://nerc.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 (UKRI) – NERC Polaris House, North Star Avenue, Swindon SN2 1FL
3.2.	Buyer name	Kailash Dholliwar
3.3.	Buyer contact details	Rsearch@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£120,000 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	Friday 25 th September 2020
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Monday 12 th October 2020 11:00
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Wednesday 14 th October 2020
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Wednesday 21 st October 2020 11:00
3.10.	Clarifications (if required)	Monday 26 th October 2020
3.11.	Anticipated notification date of successful and unsuccessful Bids	Wednesday 4 th November 2020
3.12.	Anticipated Contract Award date	Wednesday 4 th November 2020
3.13.	Anticipated Contract Start date	Tuesday 10 th November
3.14.	Anticipated Contract End date	Wednesday 30 th June 2021
3.15.	Bid Validity Period	60 Days

Section 4 – Specification

1. Introduction

Overview of investigation

This investigation aims to use public dialogue to inform NERC's healthy environment research programme in making decisions about priorities for future research. This is a diverse programme which intersects with a range of disciplines, including partnerships with other research councils. NERC/UKRI is therefore inviting proposals for public dialogue which help us to present the breadth of that work to a public audience in a clear, accessible and engaging way.

Due to the public health measures relating to COVID-19, we are looking for a supplier that will help us to explore innovative approaches to deliver this dialogue entirely online. Given the absence of physical workshops, we are looking to invite creative and/or digital organisations as partners - including those who are likely to have little to no experience of public dialogue - to help think about new ways we can bring the research to life for participants. We are therefore inviting bids from partnerships between organisations that bring together dialogue, creative and/or digital expertise. The project design and delivery must also take account issues of equality, diversity and inclusion, including to ensure that non-specialists are able and confident to share and explore their ideas.

This dialogue comes at an important moment for the UK and internationally with regards to environmental issues and research. NERC/UKRI will use the outcomes and final report for this project as part of a wider range of communications efforts in the run up to COP26. The dialogue provides an opportunity to raise the profile of healthy environment research in this context, and to demonstrate UKRI and NERC's commitment to involving the public in research.

About NERC

The [Natural Environment Research Council](#) (NERC) is part of UK Research and Innovation (UKRI). We are funded by government to commission excellent, independent environmental research. NERC is the UK's main agency for funding and managing research, training and knowledge exchange in the environmental sciences. Our work covers the full range of atmospheric, Earth, biological, terrestrial and aquatic science, from the deep oceans to the upper atmosphere and from the poles to the equator. We coordinate some of the world's most exciting research projects, tackling major issues such as climate change, environmental influences on human health, the genetic make-up of life on Earth, and much more. NERC is part of [UK Research & Innovation](#), a non-departmental public body funded by a grant-in-aid from the UK government.

NERC's [current strategy for public engagement with research and innovation](#), is guided by five objectives, of which the fifth is most relevant to this specification:

1. To build the capacity of our researchers to engage.
2. To promote engaged research.
3. To convene public debate about contemporary issues in environmental science.
4. To inspire public audiences with environmental science.
5. To listen to the public through public dialogue to inform NERC.

About UKRI

[UK Research and Innovation](#) (UKRI) works in partnership with universities, research organisations, businesses, charities, and government to create the best possible environment for research and innovation to flourish. We aim to maximise the contribution of each of our component parts, working individually and collectively. UKRI brings together the seven research councils (AHRC, BBSRC, ESRC, EPSRC, MRC, NERC and STFC), Innovate UK and a new organisation, Research England. We work with our many partners to benefit everyone through knowledge, talent and ideas. Our [Public Engagement Vision](#) outlines our commitment to ensure that policymakers, funders, researchers and innovators are able to engage a diverse range of societal perspectives, concerns and aspirations in the development of plans and priorities

Healthy environment

The theme of healthy environment, included in the [NERC Delivery Plan](#), aims to promote research and innovation to reduce and reverse environmental degradation and to increase understanding of the benefits of a healthy environment to health and wellbeing. The effects of the changing climate upon natural and personal health also relate closely to the [BEIS's Clean Growth Grand Challenge](#) (part of the Industrial Strategy), the [Government's target of net zero carbon by 2050](#), and [Defra's 25 Year Environment Plan](#). These ambitions will form a crucial context for NERC's research agenda and UKRI's programmes over the next decade.

There are number of healthy environment programmes funded by NERC/UKRI, including (but not limited to) the following:

- Co-leading the £40 million [Clean Air programme](#) ([Clean Air programme website](#)).
- Investment of £6 million in the [Emerging Risks of Chemicals in the Environment programme](#).
- Investment of £3.8 million to tackle [antimicrobial resistance in the environment from manufacturing waste in India](#).
- Up to £4 million to identify the [impact of legacy waste in the UK's coastal zone](#), and up to £4 million to understand the [effects of marine noise pollution](#).
- Investment of £4.5 million in the [Exploring and Understanding Colombian Bio Resources programme](#) to develop our understanding of socio-ecological systems, including the underpinning value of biodiversity.
- Involvement in a £3.6 million [India-UK partnership to understand sources and fate of different pollutants and to develop management strategies](#).

Relationship with other requirements

This dialogue forms part of a wider programme of research and engagement which began in February 2020. It is split up into two distinct phases (this invitation to tender is for Phase 2 only):

- **Phase 1** (February 2020 – August 2020) this involved a range of activities designed to inform the scope and framing of this study. The report from this scoping phase will be made available *in confidence* for potential applicants. It must not be shared externally.
- **Phase 2** (October 2020 – June 2021) the dialogue which relates to this tender will build upon Phase 1 and involve a creative and engaging public dialogue with a diverse group of participants from across the UK.

Public interpretations of a healthy environment

What constitutes a 'healthy environment' is interpreted and understood by the public in a variety of ways.

Sometimes the associations people have are contradictory, which is problematic for policymakers and funders. For instance, it is sometimes thought by the public that what is healthy for people is healthy for wildlife or nature (though this is not always the case).

People's associations of a healthy environment are culturally and historically imbued. The idea of a healthy environment can invoke a 'traditional' picture of rolling hills or farmed countryside, ancient woodland or forests. Furthermore, landscapes considered to be 'aesthetically beautiful' may not be particularly good for wildlife or biodiversity.

With climate change high on the political agenda, the public, funders and researchers must embrace important trade-offs associated with a healthy environment, particularly if we are to meet our legally binding climate commitments. From planning green infrastructure to improving soil health, decisions taken today are likely to have lasting impacts on our landscapes. In the context of achieving net zero by 2050, the need for rapid action creates difficult choices around funding priorities and which outcomes they will deliver.

Therefore, a deeper understanding of public views and values around healthy environment and what this means in the context of research and innovation is crucial. The overarching aim of this dialogue is to use these insights to help inform decisions about the future direction of healthy environment research.

Following the recommendations from Phase 1, NERC/UKRI is particularly interested in exploring the interdisciplinary nature of healthy environment, for instance the relationship between environment and economy, society, and culture. We therefore aim to use this dialogue to engage a wide range of programme managers and UKRI-funded researchers, to advise, oversee or participate in the project, to gain a more holistic view of the healthy environment theme and how it relates to other areas of funding across the organisation. This includes those working on health and environment (AHRC, MRC); environment and the economy (ESRC); Protection, Detection and Treatment (STFC); clean air (EPSRC, Innovate UK); or agriculture, healthy food and food security (BBSRC).

We recognise a key challenge for this project will be in representing the breadth of research related to healthy environment during the dialogues. We would like to hear suggestions as to how best to present information in a way which is engaging, accessible and enjoyable for participants.

The need for inclusive dialogue

COVID-19 has further highlighted the need for more inclusive conversations about health and environment.

For many people, lockdown has demonstrated the important role the natural environment plays in improving mental and physical health. Yet it has also shone new light on the inequalities of who uses, and has access to, these spaces. The [Natural England Monitor of Engagement](#) has shown that people from BAME backgrounds, those from lower socio economic groups, and older people are less frequent visitors of the natural environment than the rest of the adult population in England.

Considering these challenges, NERC/UKRI wishes to understand how different perspectives value the environment in various ways, including the barriers or challenges faced by groups

which benefit less from the natural environment. We would like to use this dialogue to create a space that allows us to hear specifically from underrepresented audiences, alongside a representative sample of the wider population.

2. Aims

The aims for this project are set out below:

1. Future NERC/UKRI healthy environment research programmes and projects are informed by a range of inputs including public values and views, based on clear and actionable recommendations arising from this study.
2. A detailed understanding of public priorities relating to healthy environment research as well as research which intersects with NERC's healthy environment research programme, and a rich and nuanced understanding of the reasons why they hold those priorities.
3. To demonstrate an approach to engaging under-represented groups in discussions about the environment, considering issues of equality, diversity, inclusion and access, to support UKRI's planning for future investments in these areas.

3. Objectives

The objectives of this project are:

1. To gather rich and nuanced insight into public understanding of a healthy environment.
2. To understand public views and priorities around NERC's healthy environment research programme, and the underlying values and principles.
3. To understand key tensions or trade-offs associated with public interpretations of a healthy environment, exploring the relationship between environment, economy, society and culture.
4. To understand how answers to 1-3 vary across a diverse range of public participants, including people from different geographical locations across the UK and those less likely to be engaged with the natural environment.

We would like to have an extended inception meeting so both parties have a shared understanding of the scope of the study, how the insight will be used by NERC/UKRI, along with project management, outputs, and the contract.

4. Background to the Requirement

History relevant to the procurement

In February 2020, NERC/UKRI commissioned Ipsos MORI to conduct research on public attitudes towards healthy environment research and identify opportunities for future public engagement to inform NERC's healthy environment research programme, and other linked programmes across UKRI (Phase 1).

We would like Phase 2 to learn from and build on Phase 1 insights. Applicants may refer to 'Appendix A - Phase 1 Scoping Research' to read this report if they wish to use it to inform their bid. The research had several important findings for NERC and UKRI, three of which are relevant here:

The report identified a range of opportunities to involve the public in research council work, from upstream decisions about research priorities through to what research outcomes should be sought. A specific opportunity was identified to involve the public in short-term strategy where healthy environment priorities are updated annually.

The report further suggested that the public do not think about healthy environment research in silos, and therefore dialogue could be used to explore healthy environment and its relation to other areas holistically. In light of this we would like to use Phase 2 to focus on the interdisciplinary nature of healthy environment, exploring how public conceptions of a healthy environment highlight tensions, interrelationships or trade-offs with other research areas across UKRI. This aligns with the objective in the [NERC delivery plan](#) to explore “feedback mechanisms between environmental systems and a healthy economy, society and culture.”

Finally, the report highlighted multiple opportunities to engage the public despite ongoing social distancing measures, e.g. via online deliberation. Digital tools could also be used to make dialogue more inclusive by increasing the scale of participation or improving accessibility. The report also highlighted the potential to use creative approaches to bring scientific research to life. We discuss this further in the section below.

Audience

The primary audience for this research will be: NERC Programme Managers who are responsible for setting priorities, including on healthy environment research; and public engagement teams (both within NERC and UKRI) who will share the lessons with colleagues and stakeholders. The secondary audience will be those working in other councils whose work intersects with NERC healthy environment theme. The chosen supplier will be introduced to these staff members but will also be expected to proactively build relevant contacts and (if necessary) send invitations to events.

5. Scope

The nature of such an enquiry lends itself to the use of public dialogue, which has tended to be undertaken face-to-face in physical workshops, where participants would learn about healthy environment research, in the presence of experts and facilitators, and would discuss relevant choices and trade-offs about the direction of the healthy environment research programme. This kind of approach would yield a rich and nuanced understanding of public views, and priorities for the healthy research programme.

In light of continued social distancing measures, NERC/UKRI would like this study to deploy a range of inclusive and innovative techniques that enable the public to engage in and debate a complex topic like healthy environment. In the absence of physical events, we are particularly interested in techniques with innovative approaches to engaging participants or bringing issues to life in new ways. Below we outline some of the methods we are considering.

1) Using video-conferencing to take deliberation online.

The use of video conferencing tools, with break-out rooms, has tended to be the go-to approach for deliberative public engagement during the pandemic. We see this as an important part of this dialogue, although we would like bidders to consider how best to blend the use of face-to-face video conferencing approaches alongside the use of innovative techniques as outlined below.

2) Using novel tools that enable engagement in a virtual setting.

A key recommendation from Phase 1 was that Covid-19 presents us with an opportunity to conduct online engagement in novel and innovative ways. Online communities are one way for people in different locations to engage with each other over longer periods of time, while approaches like Wikisurveys or Q Method enable larger numbers of people to prioritise issues and explore consensus (usually based around a series of statements or Q Method 'concourse') than traditional workshops. These are only suggestions and we welcome bidders to consider any other online engagement tools that help us achieve the project objectives.

3) Engagement strategies that address the power asymmetries which can exist between experts/facilitators and the public.

We would like bidders to think about ways in which dialogues can give participants more influence over how the process is run. This could include giving participants greater choice over the evidence they draw on as part of the dialogues or the specialists they hear from; or using citizen science approaches which give people tools to conduct their own research that feeds into the dialogue. We are also interested in approaches which allow participants and specialists to interact on an equal footing. For instance, online forums could allow Q&As with researchers that give more people a chance to express their opinion or have questions answered.

4) Using creative approaches (such as scenarios, gamification, or technology) to bring the issues to life.

We invite bidders to suggest creative approaches to excite, engage and build capacity that brings to life the choices and issues associated with the future direction of healthy research programme. We are open to your ideas for how this could be achieved (with the condition that they can be delivered online). We envisage some of the following: future scenarios, games, videos, role-play, interactive data visualisations, or AR and VR.

We invite bidders to propose their own designs, describing how they will meet the criteria above. Bidders should also outline how their proposed approach will produce robust outcomes and how these achieve the project objectives.

Considering the criteria above, we are particularly interested in bids from partnerships between dialogue experts, digital and/or creative organisations with little or no experience of dialogues (e.g. designers, artists or game developers). Please note however, a single contract will be let for this project. Lead applicants should provide details of any sub-contractors, or support staff, with detail of oversight procedures provided.

Other considerations

Initial interviews and intelligence gathering

Contractors will need to carry out initial intelligence gathering with internal and external stakeholders as part of the project. This will include a set of familiarization interviews with UKRI Programme Managers, and a familiarization meeting with the NERC healthy environment team.

Development of stimulus materials

The delivery contractor will be required to develop accessible and engaging stimulus materials and workshop methods to ensure participants have adequate information and time to deliberate on the relevant issues around healthy environment research. We would also like these materials to draw participants attention to the interdisciplinary nature of healthy environment, exploring the relationship between a healthy environment, economy, society and culture.

Here a key challenge for the design of a dialogue on healthy environment will be how to condense a broad and interdisciplinary portfolio of research into something which participants can understand and engage with.

Previous [Sciencewise work with the Babraham Institute](#) has made use of a case study approach, where dialogue suppliers, scientists, and an independent advisory group condensed the institute's work into four themes, and eight case studies demonstrating sufficient breadth across those themes.

Suppliers may wish to build on this approach with the use of more creative methods (as outlined above), though this case study approach is only a suggestion and we are open to alternatives that help us meet the project objectives.

The chosen bidder will be expected to draw on scientific and NGO analysis when developing stimulus materials, to ensure they are balanced and draw on different perspectives. Any stimulus materials must be signed off by NERC and UKRI prior to use.

Advisory group

NERC/UKRI will appoint an advisory group to challenge and provide recommendations on the engagement approach, including guidance of the recruitment for involving under-represented audiences in the dialogues.

Evaluation

The chosen contractor for this dialogue will be expected to capture information from participants about their experiences of the process via a participant survey.

UKRI may appoint a separate contractor to provide summative evaluation of the programme. This piece of work is likely to take a longer-term view of the impact of this dialogue, alongside several other UKRI-funded digital public engagement programmes in 2020/2021. The chosen contractor for this dialogue will be expected to assist the evaluator in performing this role e.g. in sharing relevant information, providing time for interviews or providing introductions to other interviewees.

Project management

A project core team / executive team will be established to manage the project, led by members of the dialogue delivery contractor and including members such as NERC healthy environment research team and NERC/UKRI Public Engagement Programme Managers.

Dialogue design

We acknowledge engagement may need to be broken up into shorter sessions than a traditional deliberative dialogue to cater for the online requirement. Bidders should be clear about how and why they are doing this, including the number of hours participants will be engaged for.

Given activities are taking place online, proposals must outline how they intend to enable all to participate (for instance, those with low digital skills or with poor internet connection).

The successful bidder will be expected to arrange all aspects of the stakeholder interviews, workshop(s) and briefings e.g. recruitment of participants, online platform provision, facilitation, and preparing stimulus materials.

Public participants

NERC/UKRI is also particularly interested exploring how perceptions of a healthy environment vary depending people's local environment. We therefore welcome proposals with sampling criteria which allows comparison between different locations, for example, an inner-city area with little access to green space, a rural area and a coastal area.

NERC and UKRI envisage a minimum participation level of 75 members of the public, which could be split into groups to make facilitated online dialogue more manageable.

Proposals should also outline how they will involve participants who are likely to be less engaged in the natural environment, specifically BAME audiences, people from lower socio-economic groups or older people. Our aim is here is to hear directly from groups who are less engaged in the natural environment to better understand their values and priorities for healthy environment research, and how these compare to a more representative sample of the wider population.

We invite bidders to suggest their approach for sampling, recruitment and facilitation of group discussions in their bid. A final decision on recruitment criteria will be made by NERC and UKRI in consultation with the dialogue contractor and the advisory group.

Dialogue workshops and specialist input

We anticipate that this engagement will take place using a blend of video-conferencing and asynchronous online participation (i.e. online forums or other similar tools).

Dialogues must include specialist input, with a minimum 12 in total. Specialists should be drawn from NGOs, industry and academia.

NERC/UKRI will identify relevant specialists, but contractors will be expected to manage communications with specialists for these events, including specifying the nature of the input required. All agreed specialists should be contacted as early as possible in the project and at least a minimum of one month in advance of any event and they should be effectively briefed.

Communication of results

Contractors must provide clear, engaging and accessible communications of dialogue outcomes, and provide results, learnings and benefits from the activity in a format that can be used and communicated to NERC and UKRI staff, researchers, relevant stakeholders, and members of the public. This may include a report that makes use of infographics, data visualisations or images. This should also be accompanied by a short, stand-alone summary of the findings.

Towards the end of the project, we would also like the dialogue contractor to organise a succinct policy briefing, or a stakeholder workshop, as a means to share the findings of the public dialogue with NERC/UKRI staff and to discuss how best to use the outcomes from the dialogues.

6. Requirements

Key requirements

We require the following formal outputs from the dialogue delivery contractor:

- A record of desk research and stakeholder engagement conducted, including how the outputs from Phase 1 have informed the workshop design and/or materials.
- Workshop stimulus presented in a creative, engaging and accessible format.
- Short written summaries of dialogue activities delivered weekly.
- Interim findings report (c. 5 slides or 2 pages of A4)
- Final report, (*please budget for two sets of comments, two draft reports, and final). The final report should be engaging and attractive, including an infographic or other means of easily visualising/understanding the dialogue's key findings. Contractors are welcome to suggest innovative or creative means of accomplishing this goal in their bid.
- A stand-alone summary for lay audiences with infographics. This does not have to be presented as a PDF. Again, we welcome innovative or creative formats for this.
- Planning and delivery of a policy briefing, or stakeholder workshop to disseminate and share recommendations to NERC/UKRI
- Contribution to post project review meeting

Equality, diversity and inclusion (EDI)

As well as the key requirements set out in the UKRI contract, applicants should consider how they will address specific needs related to EDI. Applicants should consider the accessibility needs of people they work with to ensure that everyone who wants to is able to engage with NERC engagement activity e.g. wheelchair accessibility of venues, subtitles, British Sign Language (BSL) translation where appropriate etc.' As part of this applicants must:

- Ensure that all imagery in public engagement is diverse and inclusive, so that the public and other external stakeholders see NERC as an inclusive, welcoming community.
- Ensure effective engagement with a broad range of communities, so NERC funded public engagement activity is more inclusive.

Sustainability

Applications should also consider the sustainability of the project, in-line with [NERC's current approach](#): sustainability for NERC is all about creating and nurturing an environment and culture in which social, economic and environmental responsibility is embedded, balancing the needs of the NERC community and our stakeholders, including immediate needs and those of future generations.

Budget

The maximum budget for this project is £120,000 (exclusive of VAT). £100,000 must be delivered and invoiced by Monday 29 March 2021, and the remaining £20,000 no later than 30 June 2021. Within these constraints, payments will be released according to agreed milestones. Bidders should lay these milestones clearly in their proposal, and they will be finalized and agreed at the project inception meeting.

These shall be agreed with winning bidder and clearly documented in any contract entered as a result of this invitation to tender.

7. Timetable

We would expect to have the contract in place by 10th November. The following provides an indicative timetable (note: activities may change depending on the supplier's approach).

Date	Activity
10 November	Contract award and inception meeting
16 November	Advisory group meeting
10 November – 29 December	Desk-based research, familiarisation interviews with stakeholders or experts to draft materials
11 January	Draft workshop design and materials finalised and shared with NERC/UKRI for comment
18 January	Final amendments to materials and design.
25 January	Materials sent to NERC/UKRI for final approval.
1 February – 2 April	Engagement, with weekly written summaries
15 March	Advisory group meeting
5 April – 3 May	Workshop analysis and reporting
10 May	1 st draft report submitted to NERC/UKRI
17 May	Comments
24 May	2 nd draft report submitted
TBC May / June	Policy briefing / stakeholder workshop with NERC staff
TBC May / June	Final comments on report (from Advisory group)
TBC June	Final report
TBC June	Final summary report for lay person audience
30 June	Project close

8. Additional Guidance Notes

Service Conditions and Environmental Factors

If the environment in which the required supplies or services will operate or be located is likely to impact on outcome, design or performance, the specification must explain those factors. If there are constraints imposed by users, the specification must also explain the nature of these limitations e.g. site access time / dates to site for deliveries.

Environmental factors may include:

- Operating and storage conditions
- Availability of energy and other services
- Intended use of products and ergonomic requirements
- Personal safety considerations
- Servicing or maintenance requirements or limitations
- Organisational policy (current / future required accreditation)
- Environmental certification requirements (Incl. 3rd party)
- Sustainability requirements e.g. compliance with regulations (WEEE directives)

9. 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 ($5+5+6=16\div3=5.33$))

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
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
<p>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.</p>		

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	20.00%
Quality	PROJ1.1	Dialogue approach and Quality of Outputs	50.00%
Quality	PROJ1.2	Project Management	15.00%
Quality	PROJ1.3	Resource, Expertise and Knowledge	15.00%

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.
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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 60
 Evaluator 2 scored your bid as 60
 Evaluator 3 scored your bid as 40
 Evaluator 4 scored your bid as 40
 Your final score will $(60+60+40+40) \div 4 = 50$

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 completion of the questionnaire 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 60 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](#)