



Invitation to Quote

Questions

Invitation to Quote (ITQ) on behalf of Higher Education Funding Council for England (HEFCE)

Subject UK SBS Expert analysis of competitive project bids to the HEFCE Connecting Capability Fund

Sourcing reference number BLOJEU-CR17038HEFCE

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 North Star House, North Star Avenue, Swindon, Wiltshire SN2 1FF
VAT registration GB618 3673 25
Copyright (c) UK Shared Business Services Ltd. 2014

UKSBS
Shared Business Services

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

COMMERCIAL QUESTIONNAIRE

SEL1.1	Please state the full legal name and address and contact details of the organisation tendering (or organisation acting as lead contact where a consortium bid is being submitted).																								
Bidder guidance	The information should be based on the details of the organisation bidding (or organisation acting as lead contact where a consortium bid is being submitted). This is the legal entity with whom we will Contract if successful.																								
Scoring criteria	For information only																								
Bidder response	<table border="1"> <tr> <td colspan="2">Table</td></tr> <tr> <td>Bidders full legal name</td><td></td></tr> <tr> <td>Address line 1</td><td></td></tr> <tr> <td>Address line 2</td><td></td></tr> <tr> <td>Address line 3</td><td></td></tr> <tr> <td>Address line 4</td><td></td></tr> <tr> <td>Town / City</td><td></td></tr> <tr> <td>Country</td><td></td></tr> <tr> <td>Post code (or equivalent)</td><td></td></tr> <tr> <td>Bidder contact</td><td></td></tr> <tr> <td>Telephone No.</td><td></td></tr> <tr> <td>Email</td><td></td></tr> </table>	Table		Bidders full legal name		Address line 1		Address line 2		Address line 3		Address line 4		Town / City		Country		Post code (or equivalent)		Bidder contact		Telephone No.		Email	
Table																									
Bidders full legal name																									
Address line 1																									
Address line 2																									
Address line 3																									
Address line 4																									
Town / City																									
Country																									
Post code (or equivalent)																									
Bidder contact																									
Telephone No.																									
Email																									

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

SEL1.3	Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015 SEL1.3 Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015? Bidder guidance - Bidder shall confirm they are or are not a relevant commercial organisation as defined by section 54 of the Modern Slavery Act 2015 by answering Yes or No. Yes - Please provide an answer to SEL1.3 No - Please answer N/A to SEL1.3
Bidder guidance	Bidder guidance - Bidder shall confirm they are or are not a relevant commercial organisation as defined by section 54 of the Modern Slavery Act 2015 by answering Yes or No.
Scoring Criteria	For Information Only
Bidder response	Yes / N/A

SEL1.4	SEL1.4 If you have answered Yes to question SEL1.3 are you compliant with the annual reporting requirements contained within Section 54 of the Modern Slavery Act 2015?
Bidder guidance	If you are subject to the Modern Slavery Act then it is a requirement of the authority in its contractual terms, for you to comply with this obligation including the authority's right of audit under any contract awarded.
Scoring Criteria	Mandatory Pass Fail
Bidder Response	Yes ☐ Please provide relevant the url ... No ☐ Please provide an explanation

FOI1.1	FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR) Information provided in the course of the procurement process may be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004 if requested under an FOI request or EIR
---------------	---

	request. Please note that some of the information provided may be protected under the FOI Act exemptions and EIR Exceptions. More information on applying the exemptions or exceptions can be found under the Information Commissioners Office (ICO) website http://ico.org.uk Please confirm you have been informed that information provided under this Bid may be disclosed under the FOI Act 2000 and Environmental Information Regulations 2004 and agree to it being published irrespective of submitting a successful or unsuccessful Bid.
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

FOI1.2	FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR) EXEMPTIONS Please complete this section <u>only</u> if you have agreed for your information to be disclosed under the FOI Act or EIR in Question FOI1.1. If you have not agreed to your information to be disclosed under the FOI Act or EIR in Question FOI1.1 please complete a field 'N/A' (Not applicable) If you have agreed for your information to be disclosed under the FOI Act or EIR in Question FOI1.1 please tell us what exemptions or exceptions may apply to your information and why? If you are not relying on any exemptions or exceptions please complete each field 'N/A' (Not applicable)	
Bidder guidance	The Bidder shall provide details of their proposed exemptions/exception in the table below. The Bidder (irrespective of submitting a successful or unsuccessful Bid) shall note that if UK SBS believes that the suggested Exemptions or Exceptions have not been applied properly as per the Act or Regulation, UK SBS will disclose the requested information unless another exemption or exception can be applied by UK SBS. Be aware that by completing FOI1.1 and answering 'Yes' you have agreed for UK SBS to disclose the provided information under the Freedom of Information Act 2000 or Environmental Information Regulation 2004, therefore you will not be approached for consent.	
Scoring criteria	For information only	
Bidder response	Confidential Information	Justification for exemption/exception under FOI Act
	Commercially sensitive information	Justification for exemption/exception under FOI Act

AW1.1	FORM OF BID I declare that to the best of my knowledge the answers submitted in this ITQ are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to bid for UK SBS's requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may reject this ITQ if there is a failure to answer all relevant questions fully or if I provide false/misleading information. I understand that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UK SBS, including the ITQ, and any contract entered into by UK SBS or its customers with its preferred supplier once the procurement is complete. By submitting a response to this ITQ I agree that our participation may be made public. I understand that the answers given in this response will not be published on the web site (but may fall to be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004). By submitting a response to this ITQ I agree and accept the justification for the Contracting Authority's evaluation criteria. By submitting a response to this ITQ I agreed and accept that UK SBS reserves the right to change without notice the procedure for awarding the Contract, to reject any or all bids for the Contract, to stop the process and not award the Contract (in whole or in part) at any time without any liability on its part. By submitting a response to this ITQ I agree and accept that nothing in this process is intended to form any express or implied contractual relationship between the Parties unless and until a Contract is awarded. UK SBS is not liable for any costs resulting from cancellation of this process nor any costs incurred by Bidders taking part in this procurement process. I understand that where sourcing documents issued by UK SBS or contracts with its suppliers fall to be disclosed UK SBS will redact them as it thinks necessary, having regard (inter alia) to the exemptions/exceptions in the FOIA or EIR.	
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail	
Scoring criteria	Mandatory Pass / Fail	
Bidder response	Yes / No	
AW1.3	CERTIFICATE OF BONA FIDE BID The essence of procurement is that the customer shall receive bona fide competitive Bids, from all those Bidding. In recognition of this principle, we certify that this is a bona fide bid, intended to be competitive and that we have not fixed or adjusted the amount of bid by or under or in accordance with any agreement with any other person.	

	We also certify that we have not done and we undertake that we will not do at any time before the hour and date specified for the return of this bid any of the following: (a) Communicate to a person other than the person calling for these bids the amount or approximate amount of the proposed bid, except where the disclosure, in confidence, of the approximate amount of the bid was necessary to obtain insurance premium quotations for the preparation of the bid; (b) Enter into any agreement or arrangement with any other person that he shall refrain from bidding or as to the amount of any bid to be submitted; (c) Offer to pay or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or have caused to be done in relation to any other bid or proposed bid for the said supply / service any act or thing of the sort described above. In this certificate, the word "person" includes any persons and any body or association, corporate or unincorporated, and any "agreement or arrangement" includes any such transaction, formal or informal, and whether legally binding or not. We acknowledge that UK SBS will be entitled to cancel the contract and to recover from us the amount of any loss resulting from such cancellation if we or our representatives (whether with our without our knowledge) shall have practiced collusion in Bidding for this contract or any other contract with UK SBS or shall employ any corrupt or illegal practices either in the obtaining or execution of this contract or any other contract with UK SBS. We agree that UK SBS may disclose the Bidders information/documentation (submitted to UK SBS during this Procurement) more widely within Government for the purpose of ensuring effective cross-Government procurement processes, including value for money and related purposes.
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

AW3.1	In the event of a Bidder successfully providing the most advantageous offer to UK SBS against a procurement requirement, the Bidder is expected to provide an answer to the attached questions as a validation check prior to the award of any Contract. If the Bidder fails to meet UK SBS' expectations we reserve the right to not award the Contract to the relevant Bidder and either award to the Bidder with the second most advantageous response or run a new procurement.`
Bidder guidance	The Bidder is not required to complete the validation check at this stage but will be required to respond to the questions in the event of providing the most advantageous offer to UK SBS against a procurement requirement. Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes I have understood that I need to complete the validation check in the event of providing the most advantageous offer to UK SBS against a procurement requirement.

AW4.1	Please confirm your acceptance of the attached Contract Terms.  S1 - Services purchasing contract E
Bidder guidance	The Bidder shall answer Yes, No with justification or No Yes – Pass No with justification – Pass. See question AW4.2 for details of what amounts to a valid justification. No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Drop down menu - Yes, No with justification, No

AW4.2	Where a Bidder has answered question AW4.1 with ‘no with justification’ they must detail the justification and the proposed change to the clause.
Bidder guidance	A justification for not accepting a specific clause or series of clauses from the attached Contract Terms is that the Bidder would be in breach of legal requirements or statutory regulations by complying with that clause or series of clauses (i.e. for the avoidance of doubt, being unable to comply with a clause or series of clauses because of an internal policy reason will not be considered to be a justification for a legal requirement or statutory regulation). Where the Bidder has answered question AW4.1 as "no with justification", the Bidder shall provide a Contract mark-up utilising track changes detailing the relevant clause, the proposed changes to the clause and the justification for the changes. In this case, the Bidder shall score a pass if (but only if) UK SBS considers both the following requirements are satisfied: • the reasons stated as justifying the Bidder's statement that it cannot accept the Contract Terms due to legal requirements or statutory regulations are valid; and • the changes submitted do not create significant risk for UK SBS and are reasonably necessary and proportionate to ensure the Bidder complies with the legal requirements and statutory regulations. Where a Bidder has answered Question AW4.1 with ‘Yes’ or ‘No’ it must answer ‘not applicable’ to achieve a Pass to question AW4.2 (noting that an answer of ‘No’ to question AW4.1 has already resulted in a fail). In the event of a Bidder answering Yes or No to Question AW4.1 and then providing a proposed mark up, rejection of a clause or a justification for a change then the response will be a Fail.
Scoring criteria	Mandatory Pass / Fail
Bidder response	Drop down menu ‘N/A’ ‘I have answered AW4.1 ‘No with justification’ and attach modifications / requested / justification’.

PRICE QUESTIONNAIRE

AW5.2	Bidders are required to complete the Excel Pricing Schedule attached in the Bidder Response section. All prices shall be exclusive of VAT. All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.  AW5.2 Price Schedule BLOJEU-CR																								
Bidder guidance	Bidders shall confirm they have completed the Pricing Schedule. The scoring methodology for this question shall be: The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion. Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50 In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: Score/Total Points multiplied by 50 (80/100 x 50 = 40) The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price. The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The lowest score possible is 0. For example, assuming the lowest bid is £100,000. <table><tr><th>Bid Price</th><th>Differential to the lowest price which meets the mandatory pass criteria</th><th>Score</th></tr><tr><td>£100,000</td><td>0</td><td>100</td></tr><tr><td>£120,000</td><td>20%</td><td>80</td></tr><tr><td>£140,000</td><td>40%</td><td>60</td></tr><tr><td>£150,000</td><td>50%</td><td>50</td></tr><tr><td>£175,000</td><td>75%</td><td>25</td></tr><tr><td>£200,000</td><td>100%</td><td>0</td></tr><tr><td>£300,000</td><td>200%</td><td>0</td></tr></table>	Bid Price	Differential to the lowest price which meets the mandatory pass criteria	Score	£100,000	0	100	£120,000	20%	80	£140,000	40%	60	£150,000	50%	50	£175,000	75%	25	£200,000	100%	0	£300,000	200%	0
Bid Price	Differential to the lowest price which meets the mandatory pass criteria	Score																							
£100,000	0	100																							
£120,000	20%	80																							
£140,000	40%	60																							
£150,000	50%	50																							
£175,000	75%	25																							
£200,000	100%	0																							
£300,000	200%	0																							
Scoring criteria	Maximum 20%																								
Bidder response	Yes																								

QUALITY QUESTIONNAIRE

AW6.1	Please confirm your compliance to the requirements of Section 4 Specification
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

PROJ1.1	<u>Approach</u> Please clearly explain and give reasoning for your proposed methodology and approach to achieving the objectives and delivering the outputs highlighted in the specification. • Give a detailed description of the method and approach to be taken in undertaking the project, indicating the resources that will be utilised; • Set out how your methods meet the project objectives of devising and delivering a robust methodology for assessment; and to analyse bids, presenting the evidence as reports to the steering group as requested in the specification; • Please cover your approach to the different stages set out in the specification – including data compilation (assessment of pathfinder and main bids), producing feedback on bids, producing reports for the steering group and advising on changes to guidance and criteria for main bidding round following the pathfinder round • Please include any methodological challenges and how you propose to address them.
Bidder guidance	Bidder guidance – Scoring shall be based on 0-100 scoring methodology. Please attach your answer as a pdf document limited to three sides of A4 – Any additional content provided beyond this will not be considered or scored during the evaluation process.
Scoring criteria	Scoring criteria Maximum Mark: 25%
Bidder response	[Selection] I confirm I have uploaded my response as a pdf document.

PROJ1.2	Staff to Deliver Please outline the anticipated key members of your project team and demonstrate their skills, capabilities and expertise essential to the delivery of this project, as well as their distinctive roles in the project and the estimated time each member will spend on the project. External Support needed Please provide details of any support that would be needed and from whom, in order to undertake and complete this project.
Bidder guidance	Bidder guidance – Scoring shall be based on 0-100 scoring methodology. Please attach your answer as a pdf document limited to three sides of A4 – Any additional content provided beyond this will not be considered or scored during the evaluation process.
Scoring criteria	Scoring criteria Maximum Mark: 25%
Bidder response	[Selection] I confirm I have uploaded my response as a pdf document.

PROJ1.3	<u>Understanding the Environment</u> Demonstrate your understanding of the project environment, detailing any knowledge relevant to the project and policy/programme area, including any data sources or research relevant to the project.
Bidder guidance	Bidder guidance – Scoring shall be based on 0-100 scoring methodology. Please attach your answer as a pdf document limited to three sides of A4 – Any additional content provided beyond this will not be considered or scored during the evaluation process.
Scoring criteria	Scoring criteria Maximum Mark: 20%
Bidder response	[Selection] I confirm I have uploaded my response as a pdf document.

PROJ1.4	Project Plan and Timescales Please outline your proposed project plan and timescales, ensuring the key deadlines and requirements outlined in the specification are met. Please include : • A detailed timetable for carrying out the work based on the proposed approach and method • Highlight key milestones and deadlines, including suggested meetings and progress reports. Demonstrate how you will mitigate risk in this project.
Bidder guidance	Bidder guidance – Scoring shall be based on 0-100 scoring methodology. Please attach your answer as a pdf document limited to two sides of A4 – Any additional content provided beyond this will not be considered or scored during the evaluation process.
Scoring criteria	Scoring criteria Maximum Mark: 10%
Bidder response	[Selection] I confirm I have uploaded my response as a pdf document.