

Invitation to Quote

Questions

**Invitation to Quote (ITQ) on behalf of Engineering and Physical
Sciences Research Council (EPSRC)**

Subject UK SBS UKRI Leadership & Development Programme

Sourcing reference number PS17018

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" data-bbox="411 573 1391 600">Table</td> </tr> <tr> <td data-bbox="411 600 906 633">Bidders full legal name</td> <td data-bbox="906 600 1391 633"></td> </tr> <tr> <td data-bbox="411 633 906 667">Address line 1</td> <td data-bbox="906 633 1391 667"></td> </tr> <tr> <td data-bbox="411 667 906 701">Address line 2</td> <td data-bbox="906 667 1391 701"></td> </tr> <tr> <td data-bbox="411 701 906 734">Address line 3</td> <td data-bbox="906 701 1391 734"></td> </tr> <tr> <td data-bbox="411 734 906 768">Address line 4</td> <td data-bbox="906 734 1391 768"></td> </tr> <tr> <td data-bbox="411 768 906 801">Town / City</td> <td data-bbox="906 768 1391 801"></td> </tr> <tr> <td data-bbox="411 801 906 835">Country</td> <td data-bbox="906 801 1391 835"></td> </tr> <tr> <td data-bbox="411 835 906 869">Post code (or equivalent)</td> <td data-bbox="906 835 1391 869"></td> </tr> <tr> <td data-bbox="411 869 906 902">Bidder contact</td> <td data-bbox="906 869 1391 902"></td> </tr> <tr> <td data-bbox="411 902 906 936">Telephone No.</td> <td data-bbox="906 902 1391 936"></td> </tr> <tr> <td data-bbox="411 936 906 969">Email</td> <td data-bbox="906 936 1391 969"></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	<p>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;</p> <p>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?</p>																								
Bidder guidance	<p>The Bidder shall answer Yes or No Yes – Fail No – Pass</p> <p>*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.</p> <p>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.</p> <p>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.</p>																								
Scoring Criteria	Mandatory Pass / Fail																								
Bidder response	Yes / No																								

FOI1.1	<p>FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR)</p> <p>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.</p> <p>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</p> <p>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.</p>	
Bidder guidance	<p>The Bidder shall answer Yes or No</p> <p>Yes – Pass</p> <p>No – Fail</p>	
Scoring criteria	Mandatory Pass / Fail	
Bidder response	Yes / No	

FOI1.2	<p>FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR) EXEMPTIONS</p> <p>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.</p> <p>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)</p> <p>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)</p>	
Bidder guidance	<p>The Bidder shall provide details of their proposed exemptions/exception in the table below.</p> <p>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.</p> <p>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.</p>	
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	<p>FORM OF BID</p> <p>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.</p> <p>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.</p> <p>By submitting a response to this ITQ I agree that our participation may be made public.</p> <p>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).</p> <p>By submitting a response to this ITQ I agree and accept the justification for the Contracting Authority's evaluation criteria.</p> <p>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.</p> <p>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.</p> <p>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.</p>
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

AW1.3	<p>CERTIFICATE OF BONA FIDE BID</p> <p>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.</p> <p>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:</p> <ul style="list-style-type: none"> (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. <p>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.</p> <p>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.</p>
Bidder guidance	The Bidder shall answer Yes or No Yes – Pass No – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

AW3.1	<p>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.</p> <p>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.'</p> <p>The validation check document is located in RFX Attachments and attached to this question.</p> <div style="text-align: center;">  <p>AW3.1 ITQ Validation check.pdf</p> </div>
-------	--

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.  PS17018 UKRI Leadership Developn
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: <ul style="list-style-type: none"> • 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

<p>AW5.2</p>	<p>Bidders are required to complete the Excel Pricing Schedule attached in the Bidder Response section.</p>  <p>PS17018 AW5.2 Price Schedule Appro</p> <p>All prices shall be exclusive of VAT.</p> <p>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</p>																								
<p>Bidder guidance</p>	<p>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.</p> <p>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.</p> <p>Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50</p> <p>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)</p> <p>The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.</p> <p>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.</p> <p>For example, assuming the lowest bid is £100,000.</p> <table border="1" data-bbox="411 1536 1406 1883"> <thead> <tr> <th>Bid Price</th> <th>Differential to the lowest price which meets the mandatory pass criteria</th> <th>Score</th> </tr> </thead> <tbody> <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> </tbody> </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																							
<p>Scoring criteria</p>	<p>Maximum Marks 10%</p>																								
<p>Bidder response</p>	<p>Yes</p>																								

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	<p>Methodology</p> <p>Please provide a detailed methodology for delivering the requirements as outlined in the specification, please include the following in your response:</p> <ul style="list-style-type: none"> • Approach Please describe your proposed approach to working with the partner organisations that will make up UKRI to develop a programme in line with the specification. • Programme Please provide a proposed illustrative outline programme, detailing your ideas about possible programme content and how this will ensure the successful delivery of the requirement (the actual programme will be developed during the contract period in accordance with the specification). • Delivery Methods Please detail the range of delivery methods (i.e. face to face, e-learning, other) you proposed to utilise during the delivery of this requirement and the process you will implement for selecting the most appropriate method. <p>How all of the above will contribute to the overall successful delivery of the project.</p>
Bidder guidance	Scoring will be based on the 0-100 methodology Please attach your response to this question as a pdf document limited to 9 sides of A4 (Arial; font size 11)
Scoring criteria	Max Marks 45%
Bidder response	Yes I have attached a response to this question

PROJ1.2	Delivery Team Please provide an organogram of the proposed core delivery team, including a “pen picture” for each of the roles indicated. Please demonstrate how these roles including the associated expertise and skills align with your proposed management structure and how the combination of people and management will enable successful delivery of this requirement.
Bidder guidance	Scoring will be based on the 0-100 methodology Please attach your response to this question as a pdf document limited to 2 sides of A4 (Arial; font size 11) for the Organogram and half page per pen picture.
Scoring criteria	Max Marks 10%
Bidder response	Yes I have attached a response to this question

PROJ1.3	Contract/Account Management Please describe your approach to successfully managing this contract, please include the following in your response: <ul style="list-style-type: none"> • Details of how roles and responsibilities will be defined, including the main points of contact and escalation procedures. • Detail the MI that you propose to provide, and your proposed evaluation model to ensure successful delivery of the aims of the programme and delivery of the objectives.
Bidder guidance	Scoring will be based on the 0-100 methodology Please attach your response to this question as a pdf document limited to 2 sides of A4 (Arial; font size 11)
Scoring criteria	Max Marks 5%
Bidder response	Yes I have attached a response to this question

PROJ1.4	Partnership Approach Please describe your approach to successfully developing a partnership relationship, please include the following in your response: <ul style="list-style-type: none"> • Define the approach you will adopt to ensure the Partnership relationship is set up • Define the approach you will adopt to ensure the Partnership relationship is maintained
----------------	---

	<ul style="list-style-type: none"> How will you use this approach to enable the successful delivery of the requirement throughout the contract duration?
Bidder guidance	<p>Scoring will be based on the 0-100 methodology</p> <p>Please attach your response to this question as a pdf document limited to 2 sides of A4 (Arial; font size 11)</p>
Scoring criteria	Max Marks 10%
Bidder response	Yes I have attached a response to this question

PROJ1.5	<p>Development & Innovation</p> <p>Please describe your approach to development and innovation of the programme during the contract period, including how you would incorporate this into the programme throughout the duration and how this will enable the successful delivery of the requirement.</p>
Bidder guidance	<p>Scoring will be based on the 0-100 methodology</p> <p>Please attach your response to this question as a pdf document limited to 2 sides of A4 (Arial; font size 11)</p>
Scoring criteria	Max Marks 10%
Bidder response	Yes I have attached a response to this question

PROJ1.6	<p>Understanding the Needs of the Leadership Group</p> <p>Please demonstrate how you will use your knowledge and understanding of motivations and what inspires the Senior Leadership Group with whom you will be training:</p> <ul style="list-style-type: none"> In order to create, review and evaluate the programme <p>And</p> <ul style="list-style-type: none"> to ensure that they are engaged, motivated and inspired throughout the ongoing delivery of the programme
Bidder guidance	<p>Scoring will be based on the 0-100 methodology</p> <p>Please attach your response to this question as a pdf document limited to 2 sides of A4 (Arial; font size 11)</p>
Scoring criteria	Max Marks 10%
Bidder response	Yes I have attached a response to this question