

Invitation to Quote



Invitation to Quote (ITQ) on behalf of UK Space Agency (UKSA)

Subject: Business Case Support

Sourcing Reference Number: PS23231

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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>

This notice sets out how the Contracting Authority will use your personal data, and your rights. It is made under Articles 13 and/or 14 of the General Data Protection Regulation (GDPR).

YOUR DATA

The Contracting Authority will process the following personal data:

Names and contact details of employees involved in preparing and submitting the bid;
Names and contact details of employees proposed to be involved in delivery of the contract;
Names, contact details, age, qualifications and experience of employees whose CVs are submitted as part of the bid.

Purpose

The Contracting Authority are processing your personal data for the purposes of the tender exercise, or in the event of legal challenge to such tender exercise.

Legal basis of processing

The legal basis for processing your personal data is processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the data controller, such as the exercise of a function of the Crown, a Minister of the Crown, or a government department; the exercise of a function conferred on a person by an enactment; the exercise of a function of either House of Parliament; or the administration of justice.

Recipients

Your personal data will be shared by us with other Government Departments or public authorities where necessary as part of the tender exercise. The Contracting Authority may share your data if required to do so by law, for example by court order or to prevent fraud or other crime.

Retention

All submissions in connection with this tender exercise will be retained for a period of 7 years from the date of contract expiry, unless the contract is entered into as a deed in which case it will be kept for a period of 12 years from the date of contract expiry.

YOUR RIGHTS

You have the right to request information about how your personal data are processed, and to request a copy of that personal data.

You have the right to request that any inaccuracies in your personal data are rectified without delay.

You have the right to request that any incomplete personal data are completed, including by means of a supplementary statement.

You have the right to request that your personal data are erased if there is no longer a justification for them to be processed.

You have the right in certain circumstances (for example, where accuracy is contested) to request that the processing of your personal data is restricted.

You have the right to object to the processing of your personal data where it is processed for direct marketing purposes.

You have the right to object to the processing of your personal data.

INTERNATIONAL TRANSFERS

Your personal data will not be processed outside the European Union

COMPLAINTS

If you consider that your personal data has been misused or mishandled, you may make a complaint to the Information Commissioner, who is an independent regulator. The Information Commissioner can be contacted at:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF
0303 123 1113
casework@ico.org.uk

Any complaint to the Information Commissioner is without prejudice to your right to seek redress through the courts.

CONTACT DETAILS

The data controller for your personal data is:

UK Space Agency

You can contact the Data Protection Officer at:

UKSA Data Protection Officer, UK Space Agency, Polaris House, North Start Road, Swindon SN2 1SZ. Email: GDPR@ukspaceagency.gov.uk

Section 2 – About the Contracting Authority

UK Space Agency (UKSA)

Founded in 2010, the UK Space Agency delivers key elements of the Government's National Space Strategy.

We use our expertise to:

- **catalyse investment**, supporting projects that drive investment and generate contracts for the UK space sector
- **deliver space capabilities and missions** that meet public needs and advance our understanding of the Universe
- **champion the power of space** to inspire people and offer greener, smarter solutions for business, and to support a sustainable future

Together, this enables us to harness the power of space to benefit our people and our planet.

Our professional staff include scientists, engineers, commercial experts, project managers and policy officials.

We have a track record of delivery: our programmes have propelled British technology across the Solar System and realised world-first innovations in spacecraft design and satellite applications.

We have a powerful global voice, partnering with institutions across the world, including the European Space Agency.

We support a thriving space sector, which currently generates an income of £16.4 billion each year and employs 45,000 people across the country.

Investment, including private and public, from the UK and overseas, will enable the space sector to deliver important research, develop new technologies and market applications, and keep pace with other nations.

<https://www.gov.uk/government/organisations/uk-space-agency>

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 Space Agency (UKSA), Polaris House, North Star Avenue, Swindon, SN2 1SZ
3.2.	Buyer name	Maria Znaiko
3.3.	Buyer contact details	professionalservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£175,000.00 excluding VAT
3.5	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Messaging Centre of the Jaggaer eSourcing portal. Guidance on how to obtain support on using the Jaggaer eSourcing portal can be found in Section 7.25. 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, unless formally advised to do so by UKSBS.

Section 3 - Timescales		
3.5.	Date of Issue of Contract Advert on Contracts Finder	Friday, 4 th August 2023
3.6.	Latest date / time ITQ clarification questions shall be received through the Jaggaer eSourcing Portal	Tuesday, 22 th August 2023 11:00
3.7.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through the Jaggaer eSourcing Portal	Friday, 25 th August 2023
3.8.	Latest date and time ITQ Bid shall be submitted through the Jaggaer eSourcing Portal (the Deadline)	Friday, 1 st September 2023 14:00
3.9.	Anticipated notification date of successful and unsuccessful Bids	Friday, 8 th September 2023
3.10.	Anticipated Contract Award date	Monday, 11 th September 2023
3.11.	Anticipated Contract Start date	Wednesday, 13 th September 2023
3.12.	Anticipated Contract End date	Friday, 20 th March 2025
3.13.	Bid Validity Period	90 Days

Section 4 – Specification

1. Introduction

The UK Space Agency (UKSA or “the Agency” hereafter) is an executive agency of the Department for Science, Innovation and Technology (DSIT). It was created in 2011 to deliver an excellent space programme with the maximum economic, scientific and policy benefit for the UK. UKSA deliver a targeted programme of research and development, innovation and scientific funding and oversight to catalyse investment, deliver space capabilities or missions and champion space.

It supports a thriving space sector in the UK, which generates an annual income of £16.5 billion and employs 47,000 people across the country. Our staff include scientists, engineers, commercial experts, project managers and policy officials who help to:

- Catalyse investment to support projects that drive investment and generate contracts for the UK space sector
- Deliver missions and capabilities that meet public needs and advance our understanding of the universe
- Champion the power of space to inspire people, offer greener, smarter solutions, and support a sustainable future.

2. Aims and Objectives

The UK Space Agency is seeking to procure specialist services to augment internal capability in developing a comprehensive process to assess Business Cases and delivery of high-profile space Research and Development Business Case(s).

As an Executive Agency, UKSA’s follows Treasury and departmental Business Case processes for making investment decisions on programmes and projects. This process is outlined in the Treasury guidance^{1 2 3}, with implementation and delegations defined in detail by DSIT. The Agency seeks departmental assurance for projects or programmes with a value greater than £20million through comprehensive business cases. Timely preparation of high-quality, evidence-based business cases is a key enabler of the Agency’s delivery priorities and a focus for the Agency Board.

Until this financial year the preparation of business cases, across all five separate chapters or cases required by Treasury guidance, was conducted by internal Agency staff. We are now seeking to make better use of external expertise to advise on our approach to business cases. This will involve reviewing, updating and implementing the central Agency’s internal guidance on cases (our ‘Business Case Centre of Excellence (CoE)’), alongside providing assurance advice on business cases seeking approval. We are seeking to improve business case quality and the efficiency of staff drafting processes by aligning our CoE to Treasury guidance, recent internal and Machinery of Government changes.

We are also seeking to external partners to author key analytical sections of future space programme business case(s). We are seeking a supplier to prepare economic case(s) and other analytical elements of larger (£20m+) business case(s) which are likely to face DSIT and Treasury scrutiny. This will involve working closely with Agency or DSIT programme

¹ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/749086/Project_Business_Case_2018.pdf

² https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/749085/Programme_Business_Case_2018.pdf

³ <https://www.gov.uk/government/publications/the-green-book-appraisal-and-evaluation-in-central-government/the-green-book-2020>

leaders, policy makers, analysts and other stakeholders to develop and evaluate different delivery options.

There are three work packages within procurement, each with their own objectives and outputs.

- Work Package A: Advice and assurance on Agency processes:
 - Objective: To improve the quality and efficiency of Agency Business Cases.
 - Output 1: An updated suite of Agency business cases guidance and process (known internally as the Business Case Centre of Excellence (CoE), reflecting structural changes and recent audits of business case assurance processes.
 - Output 2: Providing advice to Agency leaders on project or programme business cases under review for their quality and compliance with the updated guidance. Written advice is expected on approximately one business case per month.

- Work Package B: Author the Economic Case and analytical elements of a new Agency R&D programme:
 - Objective: To demonstrate the efficacy of external authorship of a business case by successfully drafting and gaining approval for a significant economic case.
 - Output 1: Delivery of the Economic Case (and associated annexes), agreed set of objectives or benefits, Theory of Change, benefits realisation plan and Monitoring and Evaluation (M&E) Plan for an Outline/Full Business Case for the Low Earth Orbit R&D Programme. This will draw on a wide evidence base to develop a robust appraisal, follows the Green Book methodology alongside DSIT and UKSA appraisal guidance.
 - Output 2: A clear narrative and link between all five Business Case chapters and the Economic rationale for investment, particularly focussed on the Strategic and Management Cases, gained by close working with programme team, UKSA and DSIT assurance teams and other stakeholders.

- Work Package C: Author the Economic Case and analytical elements for a future programme:
 - Objective: To demonstrate the efficacy of external authorship of a space business case by successfully drafting and gaining approval for a significant economic.
 - Output 1: Delivery of the Economic Case (and associated annexes) agreed set of objectives or benefits, benefits realisation plan, Theory of Change and Monitoring and Evaluation (M&E) Plan for an Outline/Full Business Case for a future programme which require DSIT (but not HMT) approval. This will draw on a wide evidence base to develop a robust appraisal, follows the Green Book methodology alongside DSIT and UKSA appraisal guidance.
 - Output 2: A clear narrative and link between all five Business Case chapters and the Economic rationale for investment, particularly focussed

on the Strategic and Management Cases, gained by close working with programme team, UKSA and DSIT assurance teams and other stakeholders.

3. Background to the Requirement

UKSA has a large number of Business Cases for new programmes in the pipeline. Until this financial year the preparation of business cases, across all five separate chapters or cases required by Treasury guidance, was conducted by internal Agency staff.

Given current capacity constraints within UKSA programme teams and the Evidence Team, we are unable to resource all these cases at the required levels. The Agency is also seeing more intense scrutiny of Business Cases and a push from DSIT to develop new modelling approaches for appraisal.

Our extant business case guidance is around 12 months old and needs updating to reflect updates to the green book, departmental structures and internal structural changes. Once updated the Agency also needs to implement a further process to oversee assurance of cases.

The Agency recently procured a supplier to provide the economic case of a smaller project (less than £20m). We are now seeking to procure suppliers to provide similar services on larger, more complex programmes.

For Work package A, the UKSA Chief of Staff will provide oversight of the work. The extant guidance and process will be provided, alongside other inputs (such as Audit Findings, feedback from the assurance of previous cases). A pipeline of projects, their drafted documents and advice on the current assurance arrangements will also be provided to enable the supplier to advise.

For Work packages B and C, the relevant UKSA Programme team will provide contract management and day-to-day task management of the Supplier, including sharing relevant guidance and processes and helping to build links with stakeholders. The UKSA Evidence team will review work and provide an additional source of analytical expertise for the supplier for technical questions. The UKSA Evidence team are analytical and economic specialists.

For Work packages B and C, the supplier is likely to work closely with the UKSA and DSIT programme teams, including the relevant Policy Leads, Finance Team and Commercial Team. They will also engage closely with DSIT analysts and assurance staff to gain approval of the economic case.

4. Scope

1. For Work Packages A:

- Develop a Project Initiation Document setting out planned approach to updating the guidance, including stakeholder engagement plan and required additional inputs or documents.
- Conduct initial review of guidance and make a single set of proposals for updates to match new best practice, structural changes and wider guidance.
- Prepare updated guidance, including necessary links or references, to be published internally.
- Advising project teams on if and how their Business Case meets the published guidance.

- Review of new cases (approximately one per month) for quality and compliance with Agency and Green Book guidance

2. For Work Packages B&C: Leading on the development and drafting of the Economic Case and analytical elements:

- Develop a Project Initiation Document setting out planned appraisal approach, timetable and stakeholder engagement plan.
- The case should draw on a wide evidence base and consultation with a wide range of stakeholders. It should be produced in line with Green Book methodology and DSIT/UKSA appraisal guidance. It will cover:
 - The rationale for intervention and market failures
 - A range of options (including a counterfactual) and clear shortlisting process
 - Full economic appraisal of cost, benefits and risks to arrive at a preferred option, with sensitivity analysis of the results.
 - Assessment of wider impacts (e.g., sustainability) and assessment of the programme's impact on protected characteristics.
- Produce interim draft of Economic Case for review.
- Further develop case, building on stakeholder feedback, to develop a final draft of the Economic Case.
- Commission and oversee QA of Economic Case.
- Ensure the Strategic Case and Economic Case are well aligned and have a clear, common narrative.
- Develop and agree a clear set of SMART investment objectives, Theory of Change, benefits realisation plan for the programme
- Development of a Monitoring and Evaluation plan, working with the Evidence Team's Social Researchers.
- Feed into the development of: SMART objectives, theory of change/ logic model, clear descriptions of outcomes, benefits and risks.

3. Be a core and collaborative member of the Business Case team, working with Programme Team members as well as Finance, Evidence and Commercial colleagues.

At conclusion of work, provide recommendations on possible process improvements to the Business Case process and areas for further development of the evidence base.

4. Requirement

Work Package A: Advice and assurance on Agency processes. We expect the cost of this work package to be no more than £60k.

This will involve:

- **Updating guidance:** Provide an updated suite of Agency business cases guidance and processes (known internally as a centre of excellence), reflecting structural changes and recent audits of business case assurance processes.
- **Assurance of new cases:** Providing advice to Agency leaders on project or programme business cases under review for their quality and compliance with the updated guidance. Organise a panel of internal assurance experts to consider approximately on business case per month, using the **supplier's** written advice as a key initial discussion document.

Work Package B: Supporting the development of the Low Earth Orbit R&D programme Outline / Full Business Case. We expect the cost of this work package to be no more than £75k.

This will involve:

- **Economic Case drafting:** Leading on the development and drafting of the Economic Case, drawing on a wide evidence base and stakeholder consultations to develop a robust appraisal approach. Ensuring a comprehensive case, which follows Green Book methodology as well as DSIT and UKSA appraisal guidance.
- **Strategic and Management Case Input:** Working closely with the Programme Team to contribute to key elements of the Strategic and Management Cases. This includes the supplier developing a clear set of SMART investment objectives, Theory of Change, benefits realisation plan and Monitoring and Evaluation plan for the programme. Ensuring that the cases are aligned and present a coherent narrative.
- **Collaborative working with UKSA and DSIT teams,** ensuring UKSA Business Case processes, including regular engagement with DSIT stakeholders, quality assurance and sign-off processes.

Work Package C: Supporting the development of one UKSA £20m+ Outline/Full Business Case. We expect the cost of this work package to be no more than £65k. This work package will be delivered under a Limit of Liability and exercised via a contract change in the event of it being taken forward.

This will involve:

- **Economic Case drafting:** Leading on the development and drafting of the Economic Case, drawing on a wide evidence base and stakeholder consultations to develop a robust appraisal approach. Ensuring a comprehensive case, which follows Green Book methodology as well as DSIT and UKSA appraisal guidance.
- **Strategic and Management Case Input:** Working closely with the Programme Team to contribute to key elements of the Strategic and Management Cases. This includes the supplier developing a clear set of SMART investment objectives, Theory of Change, benefits realisation plan and Monitoring and Evaluation plan for the programme. Ensuring that the cases are aligned and present a coherent narrative.
- **Collaborative working with UKSA and DSIT teams,** ensuring UKSA Business Case processes, including regular engagement with DSIT stakeholders, quality assurance and sign-off processes.

5. Timetable

- **For Work Package A:**
 - **Updating guidance:** Development of: Project Initiation Document (c. 2 weeks); conduct review of processes, documentation and stakeholder perception (2-4 weeks); written recommendations on how/where to update, including a draft “clean” version of new guidance (2-4 weeks)
 - **Assurance of new cases:** From October 2023 to December 2024, prepare to review a new Agency Business case for quality and compliance with guidance every month. This will involve needing to provide written advice within 2 weeks of being sent the case to review.
- **For Work Package B & C:**

- **Economic Case drafting:** Development of: Project Initiation Document (c. 2 weeks); draft Economic Case (3-5 weeks); final Economic Case development (3-5 weeks); overseeing Quality Assurance and clearance of Case (2 weeks).
 - **For work package B the case must be ready to begin DSIT assurance in November 2023.**
 - For work package C we will notify the supplier of the case and its context 30 days before work is due to begin. We expect the supplier to be needed for 5-7 months after work has begun.
 - **Strategic and Management Case Input:** timely contributions to Strategic and Management Cases, including the development of SMART objectives, Theory of Change and a Monitoring and Evaluation Plan (c. 2 weeks-throughout time of contract).
- **Collaborative working with UKSA teams, ensuring UKSA Business Case processes and guidance are adhered to** (throughout)
 - **Washup session** to provide recommendations on possible process improvements to the Business Case process and areas for further development of the evidence base (at conclusion of work).

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 of Bids

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.

To maintain a high degree of rigour in the evaluation of your bid, a process of commercial moderation will be undertaken to ensure consistency by all evaluators.

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÷3 = 5.33).

Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Qualification	SEL1.2	Employment breaches/ Equality
Qualification	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Qualification	SEL1.10	Information security requirements
Qualification	SEL2.12	General Data Protection Regulations (GDPR) Act and Data Protection Act 2018
Qualification	FOI1.1	Freedom of Information
Qualification	AW1.1	Form of Bid
Qualification	AW1.3	Certificate of Bona Fide Bid
Qualification	AW3.1	Validation check
Qualification	AW3.2	Conflict of Interest Declaration
Qualification	AW3.2.1	Conflict of Interest Declaration Supporting Information
Qualification	AW4.1	Compliance to the Contract Terms
Qualification	AW4.2	Changes to the Contract Terms
Qualification	AW4.3	Contracts with suppliers from Russia or Belarus
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
Technical	AW6.1	Compliance to the Specification
Technical	AW6.2	Variable Bids
-	-	Invitation to Quote response received on time within the Jaggaer eSourcing Portal
		In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to disqualify the Bidder and not consider evaluation of any of the Award stage scoring methodology or Mandatory pass / fail criteria.

Scoring criteria

Evaluation Justification Statement

In consideration of this particular requirement the Contracting Authority has decided to evaluate Potential Providers by adopting the weightings / scoring mechanism detailed within this ITQ. The Contracting Authority considers these weightings to be in line with existing best practice for a requirement of this type.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	25%	25%
Technical	PROJ1.1	Understanding the Business Case Environment	75%	30%
Technical	PROJ1.2	Approach and Methodology		10%
Technical	PROJ1.3	Project Plan and Timescales		10%
Technical	PROJ1.4	Staff to Deliver		25%

Evaluation of criteria

Non-Commercial 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 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.
<p>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:</p> <p>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 $(60+60+40+40) \div 4 = 50$</p> <p>Once the above evaluation process has been undertaken and the scores are apportioned by evaluator(s) this will then be subject to an independent commercial review and moderation meeting, if required by the commercial lead, any and all changes will be formally recorded relative to the regulatory obligations associated with this procurement, so as to ensure that the procurement has been undertaken in a robust and transparent way.</p>	
<p>Commercial Elements will be evaluated on the following criteria.</p>	
<p>Price will be evaluated using proportionate pricing (lowest bid / bid * mark). A bidder's score will be based on the lowest total score received divided by their total cost and then multiplied by the marks available.</p> <p>For example, if the total basket price for three bid responses is received and Bidder A has quoted £50,000 as their total price, Bidder B has quoted £80,000 and Bidder C has quoted £100,000 then the calculation will be as follows:</p> <p>(Maximum marks available in this example being 12.5)</p> <p>Bidder A Score = $50000/50000 \times 12.5 = 12.5$</p> <p>Bidder B Score = $50000/80000 \times 12.5 = 7.81$</p> <p>Bidder C Score = $50000/100000 \times 12.5 = 6.25$</p> <p>This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.</p>	

Evaluation process

The evaluation process will feature some, if not all, the following phases.

Stage	Summary of activity
Receipt and Opening	<ul style="list-style-type: none"> • ITQ logged upon opening in alignment with UK SBS's procurement procedures. • Any ITQ Bid received after the closing date will be rejected unless circumstances attributed to UK SBS, the Contracting Authority or the eSourcing Portal beyond the bidder control are responsible for late submission.
Compliance check	<ul style="list-style-type: none"> • Check all Mandatory requirements are acceptable to the Contracting Authority. • Unacceptable Bids maybe subject to clarification by the Contracting Authority or rejection of the Bid.
Scoring of the Bid	<ul style="list-style-type: none"> • Evaluation team will independently score the Bid and provide a commentary of their scoring justification against the criteria.
Clarifications	<ul style="list-style-type: none"> • The Evaluation team may require written clarification to Bids
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> • Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid and Clarifications and provide a commentary of their re-scoring justification against the Evaluation criteria.
Due diligence of the Bid	<ul style="list-style-type: none"> • the Contracting Authority may request the following requirements at any stage of the Procurement: <ul style="list-style-type: none"> ○ Submission of insurance documents from the Bidder ○ Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder ○ Taking up of Bidder references from the Bidders Customers. ○ Financial Credit check for the Bidder
Validation of unsuccessful Bidders	<ul style="list-style-type: none"> • To confirm contents of the letters to provide details of scoring and meaningful feedback on the unsuccessful Bidders Bid in comparison with the successful Bidders Bid.

Section 6 – Evaluation Response Questionnaire

Bidders should note that the evaluation response questionnaire is located within the **Jaggaer eSourcing Portal**.

Guidance on how to register and use the Jaggaer eSourcing portal is available at

<https://beisgroup.ukp.app.jaggaer.com/>

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 Section 3 of 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 the eSourcing portal 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 Jaggaer 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.
- 7.10 Do complete all questions in the evaluation response 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 the Jaggaer eSourcing portal. 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 eSourcing portal and problems with functionality within the portal must be submitted to Jaggaer eSourcing Helpdesk
- Phone** 08000 698 632
Email customersupport@jaggaer.com
- Please note; Jaggaer is a free self-registration portal. Bidders can complete the online registration at the following link:
<https://beisgroup.ukp.app.jaggaer.com/>
- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing portal. 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 Response 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 / UK SBS.
- 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 Jaggaer eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 90 days or your Bid will be rejected.
- 7.36 Bidders may only amend the contract terms during the clarification period only, only if you can demonstrate there is a legal or statutory reason why you cannot accept them. If you request changes to the Contract terms without such grounds and the Contracting Authority fail to accept your legal or statutory reason is reasonably justified, we may reject your Bid.
- 7.37 We will let you know the outcome of your Bid evaluation and where requested will provide a written debrief of the relative strengths and weaknesses of your Bid.

- 7.38 If you fail mandatory pass / fail criteria we will reject your Bid.
- 7.39 Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the Jaggaer 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 Jaggaer 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 revised its Government Security Classifications (GSC) classification scheme on the 2nd April 2014 to replace the previous Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

<https://www.gov.uk/government/publications/government-security-classifications>

The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this ITQ to reflect any changes introduced by the GSC. In particular where this ITQ is accompanied by any instructions on safeguarding classified information (e.g. a Security Aspects Letter) as a result of any changes stemming from the new GSC, whether in respect of the applicable protective marking scheme, specific protective markings given, the aspects to which any protective marking applies or otherwise. This may relate to the instructions on safeguarding classified information (e.g. a Security Aspects Letter) as they apply to the procurement as they apply to the procurement process and/or any contracts awarded to you as a result of the procurement process.

USEFUL INFORMATION LINKS

- [Contracts Finder](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

8.0 Freedom of information

- 8.1 In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA') and the Environmental Information Regulations 2004 (the 'EIR') (each as amended from time to time), UK SBS or the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 8.2 In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder should complete the Freedom of Information declaration question defined in the Question FOI1.2.
- 8.3 Where a Bidder identifies information as commercially sensitive, the Contracting Authority will endeavour to maintain confidentiality. Bidders should note, however, that, even where information is identified as commercially sensitive, the Contracting Authority may be required to disclose such information in accordance with the FoIA or the Environmental Information Regulations. In particular, the Contracting Authority is required to form an independent judgment concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, the Contracting Authority cannot guarantee that any information marked 'confidential' or "commercially sensitive" will not be disclosed.
- 8.4 Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to UK SBS or the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 8.5 Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including ITQ templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other sourcing documents issued by UK SBS or the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred supplier once the procurement is complete. By submitting a response to this ITQ Bidders are agreeing that their participation and contents of their Response may be made public.

9.0 Timescales

- 9.1 [Section 3](#) of the ITQ sets out the proposed procurement timetable. The Contracting Authority reserves the right to extend the dates and will advise potential Bidders of any change to the dates.

10.0 The Contracting Authority's Contact Details

- 10.1 Unless stated otherwise in these Instructions or in writing from UK SBS or the Contracting Authority, all communications from Bidders (including their sub-contractors, consortium members, consultants, and advisers) during the period of this

procurement must be directed through the eSourcing tool to the designated UK SBS contact.

- 10.2 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the Jaggaer eSourcing portal. Failure to follow this requirement will result in disqualification of the Response.

Appendix A – Glossary of Terms

TERM	MEANING
“UK SBS”	means UK Shared Business Services Ltd herein after referred to as UK SBS.
“Bid”, “Response”, “Submitted Bid”, or “ITQ Response”	means the Bidders formal offer in response to this Invitation to Quote
“Bidder(s)”	means the organisations being invited to respond to this Invitation to Quote
“Call Off Contract”	means the document set out in Schedule 2 of the Contract
“Central Purchasing Body”	means a duly constituted public sector organisation which procures supplies / services / works for and on behalf of Contracting Authorities
“Conditions of Bid”	means the terms and conditions set out in this ITQ relating to the submission of a Bid
“Competed Supplies/Services	means the competed supplies / services which will be Ordered from the Contract following a Mini-Competition and are set out at Schedule 2 of the Contract
“Contract”	means the agreement to be entered by the Contracting Authority and the Supplier following any award under the procurement
“Contracting Bodies”	means the Contracting Authority and any other contracting authorities described in the Contracts Finder Notice
“Contracting Authority”	A public body regulated under the Public Procurement Regulations on whose behalf the procurement is being run
“Customer”	means the legal entity (or entities) for which any Contract agreed will be made accessible to.
“Due Diligence Information”	means the background and supporting documents and information provided by the Contracting Authority for the purpose of better informing the Bidders responses to this ITQ
“EIR”	mean the Environmental Information Regulations 2004 together with any guidance and / or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations
“Find a Tender”	Means the UK Government Portal that superseded the OJEU as from 1/1/2021 https://www.find-tender.service.gov.uk/Search
“FoIA”	means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation
“Further Competition”	means re-opening competition under a framework if applicable to this procurement
“Invitation to Quote” or “ITQ”	means this Invitation to Quote documentation and all related documents published by the Contracting Authority and made available to Bidders and includes the Due Diligence Information. NOTE: This document is often referred to as an Invitation to Tender within other organisations
“Lot”	means a discrete sub-division of the requirements

“Mandatory”	Means a pass / fail criteria which must be met in order for a Bid to be considered, unless otherwise specified.
“Named Procurement person ”	means the single point of contact for the Contracting Authority based in UK SBS that will be dealing with the procurement
“Order”	means an order for served by any Contracting Body on the Supplier
“Supplier(s)”	means the organisation(s) awarded the Contract
“Supplies / Services / Works”	means any supplies/services and supplies or works set out at within <u>Section 4 Specification</u>