

# Invitation to Quote

Questions

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

Subject **UK SBS Professional Doctorates: research to understand demand for and the characteristics of the range of professional doctorates in English higher education**

Sourcing reference number **CR150006HEFCE**

**UK Shared Business Services Ltd (UK SBS)**  
[www.uksbs.co.uk](http://www.uksbs.co.uk)

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**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

<b>SEL1.1</b>	<b>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).</b>																									
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																										
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Bidder contact																										
Telephone No.																										
Email																										

<b>SEL1.2</b>	<b>Evidence of your track record</b>	
	Please provide evidence of your organisation's track record of success in undertaking similar projects, to demonstrate a thorough understanding of the UK HE sector including the English Postgraduate landscape. We would also preferably like to see expertise in issues relating to Professional Doctorates.	
Bidder guidance	Scoring shall be based on 0-100 scoring methodology. Please attach your answer as a PDF document limited to 3 sides of A4.	
Scoring criteria	<b>Maximum Marks 8.50%</b>	
Bidder response	PDF Attachment	

<b>SEL1.9</b>	<p><b>Prime Contractor, Prime Contractor with sub-contractors, Consortia, Special Purpose Vehicles and Sub-Contracting - Governance</b></p> <p>Please indicate how the Potential Provider will perform the contract by selecting options a), b), c) , d) or e) below.</p> <p>a) You will provide the solution yourself without the use of third parties (sub-contractors); or</p> <p>b) You are bidding in the role of prime contractor; and intend to use third parties (sub-contractors) to provide <u>some</u> of the requirement or</p> <p>c) You are bidding in the role of prime contractor; and intend to use third parties (sub-contractors) to provide <u>all</u> of the requirement ; or</p> <p>d) You are bidding as part of a consortium or Special Purpose Vehicle and intend to use members only to provide the requirement ; or</p> <p>e) You are bidding as part of a consortium or Special Purpose Vehicle and intend to use third parties (sub-contractors) to provide <u>some</u> of the requirement;</p>
Bidder guidance	The Bidder shall either respond <b>a, b, c, d or e.</b>
Scoring criteria	For information only
Bidder response	Drop down menu – a, b, c, d, e

<b>SEL1.10</b>	<p><b>Prime contractor with Sub Contractors, Consortia and Special Purpose Vehicles - Structure</b></p> <p>If you are bidding as a Consortia or Special Purpose Vehicle you must provide the following details for each member:</p> <ul style="list-style-type: none"> <li>- Full Legal Company name, and Trading Name where applicable;</li> <li>- Registered Address;</li> <li>- Company Registration number;</li> <li>- Type of Organisation;</li> <li>- Organisation Size – Small, Medium or Large</li> <li>- the role of each Organisation will take in delivering the requirement; and</li> <li>- the approximate % of contractual obligations assigned to the each member</li> </ul> <p>If you are bidding as a Prime Contractor with Sub Contractors, you must provide the following details for each sub contractor who will play a significant role in the delivery of the requirement::</p> <ul style="list-style-type: none"> <li>- The composition of the supply chain</li> <li>- The Sub Contractors likely to be responsible for specific elements</li> </ul>
Bidder guidance	The Bidder shall either respond to the question or if they are not acting as a <b>Prime contractor with Sub Contractors, Consortia and Special Purpose Vehicles</b> answer 'N/A' (Not applicable).  Maximum word count – 4000 characters
Scoring criteria	For information only
Bidder response	Free text

<b>SEL1.11</b>	<p><b>Consortia and Special Purpose Vehicles - Governance</b></p> <p>If you are bidding as part of a consortium or Special Purpose Vehicle you must provide details of:</p> <p>the proposed structure of the entity (e.g. a corporate joint venture, with a new limited liability company established by the consortium, with x and y as shareholders and guarantors);</p> <p>the percentage shareholdings of each member (if applicable); and</p> <p>which entities or persons will be signatories to the Framework Agreement and directly liable for the obligations of the entity (e.g. all members will be jointly and severally liable or the joint venture company will be liable).</p>
Bidder guidance	The Bidder shall either respond to the question or if they are not acting as a Consortium answer 'N/A' (Not applicable).
Scoring criteria	For information only
Bidder response	Free text

<b>SEL1.12</b>	<p><b>Consortia and Special Purpose Vehicles – Other Bids</b></p> <p>If you are a consortium or Special Purpose Vehicle you must state the full legal names (and Trading names where appropriate) of any members who are also submitting a separate Bid (either in their own name or as part of another consortium/Special Purpose Vehicle or as sub-contractor to another party) as part of this Procurement.</p>
Bidder guidance	The Bidder shall either respond to the question or if they are not a Consortium answer 'N/A' (Not applicable).
Scoring criteria	For information only
Bidder response	Free text

FOI1.1	<p><b>FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR)</b></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 <a href="http://ico.org.uk">http://ico.org.uk</a></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 <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass</p> <p><b>No</b> – Fail</p>
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

FOI1.2	<p><b>FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR) EXEMPTIONS</b></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> <p>Please state the section of the act you are referring to.</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><b>FORM OF BID</b></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	<p>The Bidder shall answer <b>Yes or No</b></p> <p><b>Yes</b> – Pass</p> <p><b>No</b> – Fail</p>
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

AW1.3	<p><b>CERTIFICATE OF BONA FIDE BID</b></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"> <li>(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;</li> <li>(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;</li> <li>(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.</li> </ul> <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.</p> <p>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	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass</p> <p><b>No</b> – Fail</p>
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

<p><b>AW3.1</b></p>	<p><b>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 following questions as a validation check prior to the award of any Contract.</b></p> <p><b>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.</b></p> <p><b>The validation check document is located in RFX Attachments and attached to this question.</b></p> <div style="text-align: center;">  <p>AW3.1 ITQ Validation check.pdf</p> </div>
<p>Bidder guidance</p>	<p>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.</p> <p><b>Yes – Pass</b></p> <p><b>No – Fail</b></p>
<p>Scoring criteria</p>	<p>Mandatory Pass / Fail</p>
<p>Bidder response</p>	<p>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.</p>

AW4.1	<p><b>Please confirm your acceptance of the attached Contract Terms.</b></p>  <p>AW4.1 Contract Terms and Conditions</p> <p>By agreeing acceptance of the attached terms and conditions you agree to accepting and signing a NDA with UK SBS' Client HEFCE. The Non-Disclosure Agreement is within the Contract Terms and Conditions (SEE Schedule 1 Special Conditions).</p>
Bidder guidance	<p>The Bidder shall answer <b>Yes, No with justification or No</b></p> <p><b>Yes – Pass</b></p> <p><b>No with justification –</b> In this situation where the Bidder must demonstrate to UK SBS's satisfaction there is a legal requirement or statutory regulation where a specific clause or series of clauses cannot be accepted shall propose alternative drafting to the relevant clause which demonstrates the justification for change and is does not expose UK SBS or its Customer to risk it deems unreasonable to achieve a Pass.</p> <p>When responding 'No with justification' the Bidder must support their response with an attachment detailing where there is a legal requirement or statutory regulation which demonstrates a clause or series of clauses cannot be accepted.</p> <p>Where UK SBS does not accept the justification then the bidder response will be considered as non compliant and after clarification will seek a "Yes" or "No" response from the bidder and evaluate the bid accordingly.</p> <p><b>No – Fail</b></p>
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No with justification/ No

## PRICE QUESTIONNAIRE

AW5.2	<p><b>Bidders are required to complete the Excel Pricing Schedule attached in the Bidder Response section.</b></p> <p><b>All prices shall be exclusive of VAT.</b></p> <p><b>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</b></p>  <p>CR150006HEFCE Price Schedule FINAL</p> <p><b>Please ensure your bid does not exceed the budget set out in the ITQ document.</b></p> <p><b>This should include costs to attend and travel to at least three steering group meetings in London or Bristol, at the following stages. Meetings will be organised by HEFCE:</b></p> <ul style="list-style-type: none"> <li>○ during project set-up (post-commission); stage 1</li> <li>○ mid-project, stage 2/3</li> <li>○ end of fieldwork; to discuss analysis prior to final reporting and consider next steps, stage 2/3</li> </ul>
Bidder guidance	<p>Bidders shall confirm they have completed the Pricing Schedule.</p> <p>The scoring methodology for this question shall be:</p> <p><b><u>The median score of the bids is calculated.</u></b></p> <p>This represents what would score exactly half of the available score. The other bids shall be scored by their difference from the median bid value being calculated as a percentage and this percentage being added or removed from the median score.</p> <p>For example if the available score is 50 and the bids we receive are £8100, £9000 and £10800.</p> <ul style="list-style-type: none"> <li>• The median score £9000 is awarded half of the available score, so scores 25.</li> <li>• £8100 is 10% cheaper than the median score so receives 10% more of the available score, so scores 30%</li> <li>• £10800 is 20% more expensive than the median score so receives 20% less of the available score, so scores 15%</li> </ul> <p>The highest possible score is 100. The lowest possible score is 0.</p>
Scoring criteria	Maximum Marks 15.00%
Bidder response	Yes I have responded to provide a Price schedule response

## QUALITY QUESTIONNAIRE

<b>AW6.1</b>	<b>Please confirm your compliance with the stated tender requirements</b>
Bidder guidance	The Bidder shall answer <b>Yes</b> or <b>No</b> <b>Yes</b> – Pass <b>No</b> – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

<b>AW6.2</b>	<b>Please confirm you are able to meet the timing schedule within the ITQ specification.</b>
Bidder guidance	The Bidder shall answer <b>Yes</b> or <b>No</b> <b>Yes</b> – Pass <b>No</b> – Fail
Scoring criteria	Mandatory Pass / Fail
Bidder response	Yes / No

<b>AW6.3</b>	<b>Proposed methodology.</b>  To be used for the research, including the evidence to be gathered, size and composition of the sample groups to be surveyed for each of the three groups; what information will you need to gather; how will the findings be meaningfully extrapolated to the English HE sector
Bidder guidance	Scoring shall be based on 0-100 scoring methodology.  Please attach your answer as a PDF document limited to 4 sides of A4.
Scoring criteria	<b>Maximum Marks 25.50%</b>
Bidder response	PDF Attachment

<b>AW6.4</b>	<p><b>Project Plan</b></p> <p>Please outline your proposed project plan and timescales for project set-up, fieldwork, analysis and reporting.</p>
Bidder guidance	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p>Please attach your answer as a PDF document limited to a maximum of 2 sides of A4.</p>
Scoring criteria	<b>Maximum Marks 8.50%</b>
Bidder response	<b>PDF Attachment</b>

<b>AW6.5</b>	<p><b>Resource (including CV's)</b></p> <p>Please include a list of the staff that will be involved in the project at all levels from director, project manager and all other levels involved.</p> <p>The list should briefly highlight relevant experience, their estimated time to be spent on the project and the length of time they have spent working with your organisation.</p> <ul style="list-style-type: none"> <li>• Each members role in the project</li> <li>• Professional qualification</li> <li>• Key Skills relevant to this tender</li> </ul> <p><b>Please Include CV's</b></p>
Bidder guidance	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p>Please attach your answer as a PDF document limited to 2 sides of A4. (CV's not included within this page limit)</p>
Scoring criteria	<b>Maximum Marks 4.25%</b>
Bidder response	<b>PDF Attachment</b>

<b>AW6.6</b>	<p><b>Risk Assessment</b></p> <p>Identifying key risks to the project and how they will be managed including the appropriateness of the proposed quality assurance processes</p> <p>Please provide details of your approach to risk management and an assessment of the foreseen project risks, both generic and project-specific, and how these will be managed.</p>
Bidder guidance	<p>Scoring will be based on the 0-100 methodology</p> <p>Maximum number of characters for response is up to 4096 characters</p>
Scoring criteria	<b>Maximum Marks 4.25%</b>
Bidder response	Text

<b>AW6.7</b>	<p><b>Value For Money</b></p> <p>Please provide details on how you would deliver value for money; emphasising the quality aspects of your bid including any added benefits you may be able to provide.</p> <p>This evaluation will take account of the quality of the proposal as a whole.</p>
Bidder guidance	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p>Please attach your answer as a PDF document limited to 2 sides of A4.</p>
Scoring criteria	<b>Maximum Marks 4.25%</b>
Bidder response	Text

<b>AW6.8</b>	<p><b>Interview</b></p> <p>Your organisation will be required to make provision for interview and have the necessary resources and skill sets available to attend and represent your organisation with regard to your tender submission.</p> <p>Interviews are the opportunity for your organisation to present to an evaluation panel.</p> <p>Please note that all organisations that are mathematically capable of winning following the scoring of all of the other criteria will be asked to attend the final stage of due process to which interviews account for 29.75% of the total quality score of 85.00%.</p> <div style="text-align: center;">         Interview.pdf     </div>
Bidder guidance	Scoring shall be based on 0-100 scoring methodology.
Scoring criteria	<b>Maximum Marks 29.75%</b>
Bidder response	Text