



Invitation to Quote

Invitation to Quote (ITQ) on behalf of UK Shared Business Services Ltd

Subject: The Provision of Leadership & Change Coaching and Development

Sourcing Reference Number: CS21385

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 Polaris House, North Star Avenue, Swindon, Wiltshire SN2 1FF
VAT registration GB618 3673 25
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Version 6.0

UKSBS
Shared Business Services

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Section 1 – About UK Shared Business Services

Putting the business into shared services

UK Shared Business Services Ltd (UK SBS) brings a commercial attitude to the public sector; helping our Contracting Authorities improve efficiency, generate savings and modernise.

It is our vision to become the leading service provider for the Contracting Authorities of shared business services in the UK public sector, continuously reducing cost and improving quality of business services for Government and the public sector.

Our broad range of expert services is shared by our Contracting Authorities. This allows Contracting Authorities the freedom to focus resources on core activities; innovating and transforming their own organisations.

Core services include Procurement, Finance, Grants Admissions, Human Resources, Payroll, ISS, and Property Asset Management all underpinned by our Service Delivery and Contact Centre teams.

UK SBS is a people rather than task focused business. It's what makes us different to the traditional transactional shared services centre. What is more, being a not-for-profit organisation owned by the Department for Business, Energy & Industrial Strategy (BEIS), UK SBS' goals are aligned with the public sector and delivering best value for the UK taxpayer.

UK Shared Business Services Ltd changed its name from RCUK Shared Services Centre Ltd in March 2013.

Our Customers

Growing from a foundation of supporting the Research Councils, 2012/13 saw Business, Energy and Industrial Strategy (BEIS) transition their procurement to UK SBS and Crown Commercial Services (CCS – previously Government Procurement Service) agree a Memorandum of Understanding with UK SBS to deliver two major procurement categories (construction and research) across Government.

UK SBS currently manages £700m expenditure for its Contracting Authorities. Our Contracting Authorities who have access to our services and Contracts are detailed [here](#).

Privacy Statement

At UK Shared Business Services (UK SBS) we recognise and understand that your privacy is extremely important, and we want you to know exactly what kind of information we collect about you and how we use it.

This privacy notice link below details what you can expect from UK SBS when we collect your personal information.

- We will keep your data safe and private.
- We will not sell your data to anyone.

- We will only share your data with those you give us permission to share with and only for legitimate service delivery reasons.

<https://www.uksbs.co.uk/use/pages/privacy.aspx>

Section 2 – About the Contracting Authority

UK Shared Business Services

Established in 2007 by the UK Research Councils as part of the drive for greater efficiency, UK Shared Business Services Ltd provides HR & Payroll, Finance, Procurement and IT services to support the front line of UK research and innovation.

We've evolved over the last 10 years – both in terms of our service offering and client base – and our new direction under the joint ownership of the Department for Business, Energy & Industrial Strategy (BEIS) and UK Research and Innovation (UKRI) positions UK SBS as a recognised Shared Services provider to Government.

Our journey continues as we work with our owners to harness the potential of our expertise and evolving technology to drive forward and realise the maximum benefit from shared services.

For more info, please visit our website: <http://www.ukpbs.co.uk/Pages/default.aspx>

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 Shared Business Services Limited, Polaris House, North Star Avenue, Swindon, Wiltshire, SN2 1FF
3.2.	Buyer name	Sharon West
3.3.	Buyer contact details	Coreservices@uksbs.co.uk
3.4.	Maximum value of the Opportunity	£115,000.00 excluding VAT.
3.5.	Process for the submission of clarifications and Bids	All correspondence shall be submitted within the Messaging Centre of the e-sourcing. Guidance Notes to support the use of Delta eSourcing is available here. Please note submission of a Bid to any email address including the Buyer <u>will</u> result in the Bid <u>not</u> being considered.

Section 3 - Timescales		
3.6.	Date of Issue of Contract Advert on Contracts Finder	Wednesday 18 th August 2021
3.7.	Latest date / time ITQ clarification questions shall be received through Delta eSourcing messaging system	Wednesday 25 th August 2021 @ 11:00hrs GMT
3.8.	Latest date / time ITQ clarification answers should be sent to all Bidders by the Buyer through Delta eSourcing Portal	Thursday 26 th August 2021
3.9.	Latest date and time ITQ Bid shall be submitted through Delta eSourcing	Wednesday 8 th September 2021 @ 14:00hrs GMT
3.10.	Anticipated notification date of successful and unsuccessful Bids	Tuesday 21 st September 2021
3.11.	Anticipated Contract Award date	Tuesday 21 st September 2021
3.12.	Anticipated Contract Start date	Friday, 01 October 2021
3.13.	Anticipated Contract End date	Thursday, 31 March 2022
3.14.	Bid Validity Period	60 Days

Section 4 – Specification

Introduction

UK Shared Business Services Ltd (UK SBS) is seeking to transform to realise its 2025 ambition to deliver high quality and efficient business services and systems for its owners and clients. A part of this is to transform our capability to do so by harnessing digital and innovation to become the leading UK public sector business services provider, actively sought by government bodies, in context of the Government Shared Services (GSS) strategy <https://www.gov.uk/government/publications/a-shared-services-strategy-for-government>. Fundamentally, we aim to provide high quality and easy to use business services that add value to our partners, so they can focus on achieving the best outcomes for the British people and the UK economy.

There is a need for workforce transformation to be able to deliver the vision, which includes client led re-platforming of legacy ERP systems onto modern cloud SaaS technologies that will fundamentally change the way a large part of the organisation operates and creates a shift in the skills required. The aim is to achieve the necessary capacity and capability within UK SBS, underpinned by an enabling culture and critical key behaviour.

From October through to December 2020, UK SBS commissioned a review in collaboration with PwC to determine a suite of activities that need to be undertaken by UK SBS to enable this transformation. The recommendations from this review were to undertake transformational activity focussed on Organisation Design, the Strategic Workforce Plan, and Culture & Behaviour. This will take a period of several years aligned to various client led major programmes that will drive the timing of required changes. We have an initial phase set to be achieved by April 2022 that will focus on:

- **Reorganising leadership** at the top level to support strategic change.
- **Aligning leadership** on the critical behaviours and changes required within the organisation to achieve the transformation vision.
- **Embedding a culture** based upon the following critical behaviours, supported by a line management structure which enables autonomous decision making and appropriate capability build:
 - Be curious
 - Take action
 - Add value
- **Developing the Workforce Strategy**, designing and implementing workforce management processes including a skills framework
- Undertaking an **activity analysis** in order to confirm the baseline state of UK SBS and fully inform the future organisation design
- **Implementing a structure** which allows flex in the size and shape of the organisation's workforce in line with the demands of expected future business events, whichever order they occur in
- **Effective communications and engagement** to support clients, other external stakeholders and employees.



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Further background can be found here: and here <https://www.uksbs.co.uk>

The Requirement

The requirement is to deliver Leadership and Change coaching to an identified Executive and Management cohort from across the organisation, who are pivotal in leading teams through the transformation journey that will be undertaken over the next few years.

There is an immediate need to provide support to kick-start a lengthy period of change. The requirement has been informed by consultancy supported work to review current practices and culture within the organisation and to help design of the transformation goals and plans.

This requirement will form part of a wider set of activities to upskilling and developing the workforce.

This is a time critical initiative, with coaching to commence in early October 2021 and the costs incurred in this financial year ending 31st March 2022.

Aims and Objectives

External assistance is required to spend up to six months to support and equip the Company's leaders as they embark on pro-actively leading the organisation's employees through a transformation that some leaders and team members will find challenging and unsettling; creating a workforce ready to cope with a future characterised by significant transformational change and complexity.

The successful supplier shall provide a structured and engaging proposal for supporting and enhancing our leadership capability over the duration of the contract.

The successful supplier shall:

- Provide individual and group training and coaching to key UK SBS leaders, to enhance their personal effectiveness whilst leading the organisation through a period of transformational change.
- Activities are to be delivered as a mix of face to face (Covid restrictions allowing) and virtual sessions; face to face meetings will take place at UK SBS offices or agreed external venues booked and paid for by UK SBS; travel expenses will be paid as set out in the UK SBS travel and subsistence policy. UK SBS Offices are located in Swindon, Newport and Billingham.
- To equip leaders to provide mentoring, guidance and support to their teams whilst providing necessary clarity of direction (with rationale) and holding potentially 'difficult discussions'.
- To provide guidance to ensure the leaders model the three critical behaviours – Be Curious, Take Action, Add Value – driving continuous improvement and embracing change.

The UK SBS Leadership Team consist of :

- Executive (5 at organisational level one); 'Heads of' (19 at organisational level two); Key influencers (up to 26 managers leading large teams and / or hypo talent and / or other key example setters – selected in consultation with Executive).

The cadre vary in ability, potential and experience. Backgrounds are public sector with some commercial. A significant number are long serving, having been with the organisation during both a period when closure of the company was a possibility and an earlier period of planned growth that did not materialise. There is schematism to be overcome and drive and commitment to be generated. Delivering the organisation's Business Plan may see the company grow from circa 600 to over 1,000, further changing the nature of organisational dynamics; new leaders are likely to join the organisation, potentially challenging well established relationships.

The successful supplier will produce collateral to support the training and coaching, that can then be retained and reused by UK SBS, as we continue our journey over the next few years.

Contract Management

There is an appointed Programme Manager within UK SBS who will work with the successful supplier to ensure delivery of the contract. There is an expectation of regular review meetings (either face to face or virtually). The frequency of the meetings shall be agreed with the successful supplier upon commencement of the contract.

GDPR

UK SBS reserves the right to amend the annex A located within the terms and conditions in relation to GDPR once the deliverables have been confirmed with the successful supplier

We are seeking proposals as to how to address the key aims and objectives of ensuring the leadership cadre successfully model the critical behaviours, to help create the desired culture whilst driving an unsettling transformation. We do not wish to over specify the nature of the interventions, rather we would welcome suggested approaches from professional experts. We are seeking to ensure participants find the group and individual interventions challenging. Interventions could encompass:

- Collective training on the principles of transformational leadership and change management
- Individual analysis to identify natural strengths and weaknesses to help set objectives and coaching, possibly supported by Psychometric evaluation of behaviours
- Targeted individual and collective coaching sessions to address prioritised points of need, at a frequency to be proposed.
- Provision face to face (unless precluded by Covid-19) of key interventions with additional telephone support coaching.

Bidders must set out the rationale and evidence for the effectiveness of the proposed approach.

Timetable

For six months commencing early October 2021.

All individuals identified in the scope will need to be met with regularly over the entirety of the contract.

Payment:

Payment will be made in two equal payments, after three months and at contract completion. Payments shall be made via BACS within 30 days of receipt of valid invoice and Purchase Order.

Expenses are permitted in alignment with UK SBS Travel and Subsistence Policy (Appendix 1), subject to prior approval from UK SBS.

Terms and Conditions

Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, shall be raised as a formal clarification during the permitted clarification period.

Section 5 – Evaluation model

The evaluation model below shall be used for this ITQ, which will be determined to two decimal places.

Where a question is 'for information only' it will not be scored.

The evaluation team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required.

The evaluation and if required team may comprise staff from UK SBS and the Contracting Authority and any specific external stakeholders the Contracting Authority deems required. After evaluation and if required moderation scores will be finalised by performing a calculation to identify (at question level) the mean average of all evaluators (Example – a question is scored by three evaluators and judged as scoring 5, 5 and 6. These scores will be added together and divided by the number of evaluators to produce the final score of 5.33 ($5+5+6=16 \div 3 = 5.33$))

Pass / Fail criteria		
Questionnaire	Q No.	Question subject
Commercial	SEL1.2	Employment breaches/ Equality
Commercial	SEL1.3	Compliance to Section 54 of the Modern Slavery Act
Commercial	SEL2.12	General Data Protection Regulations (GDPR) Act and the Data Protection Act 2018
Commercial	FOI1.1	Freedom of Information
Commercial	AW1.1	Form of Bid
Commercial	AW1.3	Certificate of Bona Fide Bid
Commercial	AW3.1	Validation check
Commercial	AW4.1	Compliance to the Contract Terms
Commercial	AW4.2	Changes to the Contract Terms
Price	AW5.1	Firm and Fixed Price
Price	AW5.1.1	Maximum Budget
Quality	AW6.1	Compliance to the Specification
Quality	AW6.2	Variable Bids
Quality	AW6.3	Deadline to Deliver
-	-	Invitation to Quote – received on time within e-sourcing tool
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.

Questionnaire	Q No.	Question subject	Maximum Marks
Price	AW5.2	Price	20.00%
Quality	PROJ1.1	Approach, Methodology and Programme Plan	50.00%
Quality	PROJ1.2	Team Composition and Capability to Deliver	30.00%

Evaluation of criteria

Non-Price elements

Each question will be judged on a score from 0 to 100, which shall be subjected to a multiplier to reflect the percentage of the evaluation criteria allocated to that question.

Where an evaluation criterion is worth 20% then the 0-100 score achieved will be multiplied by 20%.

Example if a Bidder scores 60 from the available 100 points this will equate to 12% by using the following calculation:

$$\text{Score} = \{\text{weighting percentage}\} \times \{\text{bidder's score}\} = 20\% \times 60 = 12$$

The same logic will be applied to groups of questions which equate to a single evaluation criterion.

The 0-100 score shall be based on (unless otherwise stated within the question):

0	The Question is not answered, or the response is completely unacceptable.
10	Extremely poor response – they have completely missed the point of the question.
20	Very poor response and not wholly acceptable. Requires major revision to the response to make it acceptable. Only partially answers the requirement, with major deficiencies and little relevant detail proposed.
40	Poor response only partially satisfying the 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.

All questions will be scored based on the above mechanism. Please be aware that there may be multiple evaluators. If so, their individual scores will be averaged (mean) to determine your final score as follows:

Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

Evaluator 4 scored your bid as 40

Your final score will $(60+60+40+40) \div 4 = 50$

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.

Price elements will be judged on the following criteria.

The lowest price for a response which meets the pass criteria shall score 100. All other bids shall be scored on a pro rata basis in relation to the lowest price. The score is then subject to a multiplier to reflect the percentage value of the price criterion.

For example - Bid 1 £100,000 scores 100.

Bid 2 £120,000 differential of £20,000 or 20% remove 20% from price scores 80

Bid 3 £150,000 differential £50,000 remove 50% from price scores 50.

Bid 4 £175,000 differential £75,000 remove 75% from price scores 25.

Bid 5 £200,000 differential £100,000 remove 100% from price scores 0.

Bid 6 £300,000 differential £200,000 remove 100% from price scores 0.

Where the scoring criterion is worth 50% then the 0-100 score achieved will be multiplied by 50.

In the example if a supplier scores 80 from the available 100 points this will equate to 40% by using the following calculation: $\text{Score/Total Points} \times 50$ ($80/100 \times 50 = 40$)

The lowest score possible is 0 even if the price submitted is more than 100% greater than the lowest price.

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.

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 the Contracting Authority or the e-sourcing tool 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.

	<ul style="list-style-type: none"> 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.
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> To review the outcomes of the Commercial review To agree final scoring for each Bid, relative rankings of the Bids
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. 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 questionnaire

Bidders should note that the evaluation questionnaire is located within the **e-sourcing questionnaire**.

Guidance on how to register and use the e-sourcing portal is available at <http://www.uksbs.co.uk/services/procure/Pages/supplier.aspx>

PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY

Section 7 – General Information

What makes a good bid – some simple do's 😊

DO:

- 7.1 Do comply with Procurement document instructions. Failure to do so may lead to disqualification.
- 7.2 Do provide the Bid on time, and in the required format. Remember that the date/time given for a response is the last date that it can be accepted; we are legally bound to disqualify late submissions. Responses received after the date indicated in the ITQ shall not be considered by the Contracting Authority, unless the Bidder can justify that the reason for the delay, is solely attributable to the Contracting Authority
- 7.3 Do ensure you have read all the training materials to utilise e-sourcing tool prior to responding to this Bid. If you send your Bid by email or post it will be rejected.
- 7.4 Do use Microsoft Word, PowerPoint Excel 97-03 or compatible formats, or PDF unless agreed in writing by the Buyer. If you use another file format without our written permission, we may reject your Bid.
- 7.5 Do ensure you utilise the Delta eSourcing messaging system to raise any clarifications to our ITQ. You should note that we will release the answer to the question to all Bidders and where we suspect the question contains confidential information, we may modify the content of the question to protect the anonymity of the Bidder or their proposed solution
- 7.6 Do answer the question, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid, the evaluation team have limited time to assess bids and if they can't find the answer, they can't score it.
- 7.7 Do consider who the Contracting Authority is and what they want – a generic answer does not necessarily meet every Contracting Authority's needs.
- 7.8 Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the question/s they apply to.
- 7.9 Do provide clear, concise and ideally generic contact details; telephone numbers, e-mails and fax details.
- 7.10 Do complete all questions in the questionnaire or we may reject your Bid.
- 7.11 Do ensure that the Response and any documents accompanying it are in the English Language, the Contracting Authority reserve the right to disqualify any full or part responses that are not in English.
- 7.12 Do check and recheck your Bid before dispatch.

What makes a good bid – some simple do not's Ⓜ

DO NOT

- 7.13 Do not cut and paste from a previous document and forget to change the previous details such as the previous buyer's name.
- 7.14 Do not attach 'glossy' brochures that have not been requested, they will not be read unless we have asked for them. Only send what has been requested and only send supplementary information if we have offered the opportunity so to do.
- 7.15 Do not share the Procurement documents, they are confidential and should not be shared with anyone without the Buyers written permission.
- 7.16 Do not seek to influence the procurement process by requesting meetings or contacting UK SBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of formal Buyer communications shall have no Legal standing or worth and should not be relied upon.
- 7.17 Do not contact any UK SBS staff or the Contracting Authority staff without the Buyers written permission or we may reject your Bid.
- 7.18 Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will reject your Bid.
- 7.19 Do not offer UK SBS or the Contracting Authority staff any inducement or we will reject your Bid.
- 7.20 Do not seek changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed.
- 7.21 Do not cross reference answers to external websites or other parts of your Bid, the cross references and website links will not be considered.
- 7.22 Do not exceed word counts, the additional words will not be considered.
- 7.23 Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid will be rejected.
- 7.24 Do not unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority send your response by any way other than via e-sourcing tool. Responses received by any other method than requested will not be considered for the opportunity.

Some additional guidance notes

- 7.25 All enquiries with respect to access to the e-sourcing tool and problems with functionality within the tool must be submitted to Delta eSourcing, Telephone 0845 270 7050
- 7.26 Bidders will be specifically advised where attachments are permissible to support a question response within the e-sourcing tool. Where they are not permissible any attachments submitted will not be considered as part of the evaluation process.
- 7.27 Question numbering is not sequential and all questions which require submission are included in the Section 6 Evaluation Questionnaire.
- 7.28 Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 7.29 We do not guarantee to award any Contract as a result of this procurement
- 7.30 All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 7.31 We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the Delta eSourcing Portal.
- 7.32 If you are a Consortium you must provide details of the Consortiums structure.
- 7.33 Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 7.34 Bidders should note the Government's transparency agenda requires your Bid and any Contract entered into to be published on a designated, publicly searchable web site. By submitting a response to this ITQ Bidders are agreeing that their Bid and Contract may be made public
- 7.35 Your bid will be valid for 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 Delta eSourcing Portal.
- 7.40 Bidders should note that if they are successful with their proposal the Contracting Authority reserves the right to ask additional compliancy checks prior to the award of

any Contract. In the event of a Bidder failing to meet one of the compliancy checks the Contracting Authority may decline to proceed with the award of the Contract to the successful Bidder.

- 7.41 All timescales are set using a 24-hour clock and are based on British Summer Time or Greenwich Mean Time, depending on which applies at the point when Date and Time Bids shall be submitted through the Delta eSourcing Portal.
- 7.42 All Central Government Departments and their Executive Agencies and Non-Departmental Public Bodies are subject to control and reporting within Government. In particular, they report to the Cabinet Office and HM Treasury for all expenditure. Further, the Cabinet Office has a cross-Government role delivering overall Government policy on public procurement - including ensuring value for money and related aspects of good procurement practice.

For these purposes, the Contracting Authority may disclose within Government any of the Bidders documentation/information (including any that the Bidder considers to be confidential and/or commercially sensitive such as specific bid information) submitted by the Bidder to the Contracting Authority during this Procurement. The information will not be disclosed outside Government. Bidders taking part in this ITQ consent to these terms as part of the competition process.

- 7.43 The Government introduced its new Government Security Classifications (GSC) classification scheme on the 2nd April 2014 to replace the current Government Protective Marking System (GPMS). A key aspect of this is the reduction in the number of security classifications used. All Bidders are encouraged to make themselves aware of the changes and identify any potential impacts in their Bid, as the protective marking and applicable protection of any material passed to, or generated by, you during the procurement process or pursuant to any Contract awarded to you as a result of this tender process will be subject to the new GSC. The link below to the Gov.uk website provides information on the new GSC:

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

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

USEFUL INFORMATION LINKS

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

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.

8.6. Response Validity

- 8.6.1 Your Response should remain open for consideration for a period of 90 days. A Response valid for a shorter period may be rejected.

8.7. Timescales

- 8.7.1 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.

8.8. The Contracting Authority's Contact Details

- 8.8.1 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 e-sourcing tool to the designated UK SBS contact.

- 8.7.2 All enquiries with respect to access to the e-sourcing tool may be submitted to Delta eSourcing on 0845 270 7050 please note this is a free self-registration website, and this can be done by completing the online questionnaire at [https:// delta-esourcing.com/](https://delta-esourcing.com/)
- 8.7.3 Bidders should be mindful that the designated Contact should not under any circumstances be sent a copy of their Response outside of the e-sourcing tool. 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
“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
“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 Contract 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
“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
“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
“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
“Other Public Bodies”	means all Contracting Bodies except the Contracting Authority
“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>

Appendix 1 – UK SBS Travel and Subsistence Policy

Freedom of Information Statement

This policy is suitable for publication in its entirety in accordance with the Freedom of Information Act 2000. (UK SBS is legally obliged to proactively publish its policies in full. Guidance is to be sought from the Records Manager when a policy is considered unsuitable for publication)

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Related Documents

Driving and Travel Policy
Health and Safety Policy
Gifts and Hospitality Policy

1. Policy Aim and Scope

- 1.1. This document explains the UK Shared Business Services Ltd (UK SBS) policy for travel on official business and the reimbursement of expenses incurred while on business away from a person's normal place of work. This includes attendance at training courses as well as travel for business meetings.
- 1.2. Hospitality expenses, i.e. the entertaining of special visitors, which is subject to the specific approval and control of the Executive Team, are not covered by this policy.

2. Applicability

- 2.1. This policy applies to all employees, directors, non-executive directors and contractors. All usage of the word "employee" in the policy includes all of the above unless otherwise stated.

3. Policy Detail

3.1 Overall Principles

- 3.1.1 All employees travelling on business for UK SBS are required to notify their manager of their itinerary and contact details prior to departure. Employees should ensure they are fit to undertake the journey and consult a doctor beforehand if there is any doubt. UK SBS travel insurance does not cover any travel taken against the advice of a medical practitioner. In particular, if travelling on Company business by car, whether hired through the Company's preferred supplier or driving their own car, employees must take all reasonable precautions to ensure their safety as detailed in the Company's Health and Safety Policy.
- 3.1.2 As a guide, an employee should not be financially out of pocket as a result of undertaking official business travel. Similarly, employees should not make a profit from travelling on behalf of UK SBS.
- 3.1.3 Rules and guidelines relating to such expenditure will take into account both the need to meet appropriate standards (for example of travel and accommodation) and the protection and welfare of those travelling.

3.2 Value for Money and General Rules

- 3.2.1 Only costs that are **necessary** and **additional** to normal daily expenditure should be claimed and reimbursed.
- 3.2.2 **Necessary** expenses are those essential to you conducting your business away from your usual place of work. The Company expects to reimburse meals for which you would not normally have to pay (within the guideline amounts) and any expenses directly related to doing your job whilst away from your usual place of work.
- 3.2.3 **Additional** means that you should only claim for expenses **over and above** those you would usually incur **whilst working at your usual place of work**.

It is not expected that, if you do claim for lunch, you reduce your claim by the amount that you would usually spend but you should consider, for example, whether you should claim for a meal at all.

3.2.4 When undertaking any business travel you must ensure that **best value for money** is achieved for UK SBS. You should plan any trip carefully and give consideration to minimising all costs incurred, as below.

- Ensure you have line manager approval before booking your journey.
- Check whether or not your journey is really necessary. It may be that the objective of your journey or meeting can be accomplished by other means such as teleconference or videoconference.
- Consider whether one employee can attend a meeting/event rather than sending two or more.
- If more than one employee is travelling to the same destination, consider different methods of travel (e.g. 3 people sharing a car hire may be less expensive than 3 x train tickets)
- Where practicable and possible, schedule meetings for a time of day that allows participants to travel off-peak to and from the venue.
- Book all rail or air travel via the corporate travel system.

3.2.5 For economic and environmental reasons, **public transport should be used wherever practicable**. When other forms of transport have to be used (e.g. private cars, hire cars and taxis), consideration should always be given to sharing vehicles if two or more people are travelling to the same destination.

3.2.6 When making travel arrangements consideration should be given to the cost-effectiveness, environmental impact and the proper use of public money. Some examples of good practice are:

- Usage of public transport when possible
- Usage of electric vehicles
- Sharing of private transport
- Usage of any available special fare deals for public transport
- Usage of discounted rates for hotels
- Remote working rather than a return to normal place of work

3.2.7 **The cost of travel from home to a normal place of work is never a reimbursable expense** (even if for overtime or weekend working) as it would be considered a taxable benefit. If travel is required to another UK SBS site, claims for mileage must only be made once the mileage from home to the normal place of work has been deducted. For example, if an employee normally travels 5 miles to work but is required to travel 20 miles to another UK SBS site the mileage claimable is 15 miles.

3.2.8 Any expenditure which is excessive, or not properly justified, will not be reimbursed by UK SBS. An employee's line manager is the initial judge of this but in case of doubt or dispute the decision of the Finance Director is final. Any behaviour regarding expenses which gives rise to concern will be regarded as a potential disciplinary offence.

- 3.2.9 Those claiming expenses, and their managers, are **responsible and accountable** for all budgetary decisions in respect of travel arrangements.
- 3.2.10 If more than one person is covered by any reimbursable activity (e.g. the sharing of transport or a meal) the expense claim for that activity/meal **must** be submitted by the most senior person present and cannot be approved by any person covered by that claim. Any breach of this principle will be brought to the attention of the manager responsible for those involved and will be regarded as a potential disciplinary offence. The names of all covered by the shared activity must be listed on the expense claim.
- 3.2.11 If a customer is also covered by a reimbursable activity e.g. a meal, the names of all those covered by the shared activity must be listed on the expense claim.
- 3.2.12 Contractors working at UK SBS must not enter expense claims through the UK SBS iExpenses system or submit expenses via the non-employee expense process. Contractor expenses must be invoiced to the company by the contractor's agency/company, with the correct Purchase Order cover.
- 3.2.13 Other than contractors, non-employees (eg Board Members) are to submit claims via a non-employee expense form. This form must be fully completed, coded and authorised before submitting to AP processing with all receipts attached.

3.3 Accommodation and Subsistence

- 3.3.1 Accommodation should be booked and purchased via the corporate travel system and if this is not possible prior authorisation must be sought from the line manager to claim the costs through expenses.
- 3.3.2 Reasonable, **actual** expenditure incurred on overnight accommodation, meals and transport will be reimbursed, provided it is receipted and within the limits set out at Annex A. These limits are also applicable to accommodation paid for via the corporate travel system.
- 3.3.3 Where meals are provided, for example as part of training courses/conferences or air journeys, no additional claims for subsistence should be made.
- 3.3.4 Those working away from their normal place of work, but based at another UK SBS site, are **not** entitled to claim subsistence whilst on site. If an overnight stay is required, the employee will be entitled to claim for an evening meal.
- 3.3.5 Claims for alcohol must not be submitted, even if taken with a meal. If claiming for a meal in which alcohol was consumed, the cost of alcohol must be deducted from the expense claim.
- 3.3.6 There is no flat-rate allowance payable for staying with "Friends or Family".

3.4 Rail Travel

- 3.4.1 Normally standard class rail travel must be used for all journeys in both the UK and abroad. Rail tickets should be purchased via the corporate travel system and if this is not possible prior authorisation must be sought from the line manager to claim the costs through expenses.
- 3.4.2 Where a season ticket is held which covers all or part of a business journey, reimbursement will be limited to any excess cost incurred.
- 3.4.3 Contractors working at UK SBS must have rail travel booked by an UK SBS employee through the corporate travel system. If this is not possible and rail travel is booked by the contractor, the cost must be included as part of the contractor's invoicing.

3.5 Road Travel

3.5.1 Private Motor Vehicles

- 3.5.1.1 Those wishing to use their own private cars on UK SBS business must seek prior authority from their manager.
- 3.5.1.2 Where private motor vehicles are used for travel, the costs incurred will be met by the payment of the standard mileage rates (usually the HMRC standard rates). **See Annex A for details of current rates and thresholds.**
- 3.5.1.3 Employees in receipt of a company car allowance are only permitted to claim mileage at the lower mileage rate (see Annex A).
- 3.5.1.4 Journeys should normally be taken by the shortest route. If a longer route is taken in order to save travelling time (e.g. to avoid road works), an explanation must be provided to support any subsequent mileage claim. When an employee starts a journey from their home, rather than the office, payment will be restricted to the equivalent mileage from the office, if this distance is shorter.
- 3.5.1.5 Individuals **must** ensure before making the journey that:-
- The vehicle has a valid excise licence;
 - The vehicle is roadworthy and, if over 3 years old, has a valid MOT certificate;
 - They hold a valid UK driving licence for that vehicle;
 - There is no medical reason, of which they are aware, why they should not drive; and
 - Their motor insurance cover extends to business use. Private vehicles cars should only be used for work if they are insured to do so (most policies will include cover for Occasional Business Use, but this **must** be checked by the driver). Any cost incurred to extend a car insurance to include Occasional Business Use will not be reimbursed by UK SBS as the mileage rates in Annex A

are designed to cover the total cost of personal car usage, including insurance.

3.5.1.6 UK SBS accepts no liability whatsoever where someone undertakes a journey without satisfying the above criteria.

3.5.1.7 The following vehicles are regarded as private.

- A vehicle owned by an employee (or employee's spouse/partner) and registered in an employee's name (or employee's spouse/partner).
- A vehicle being bought on credit terms and registered in an employee's name (or employee's spouse/partner).
- A vehicle hired in an employee's name.

3.5.1.8 The Company reserves the right to make occasional checks to confirm the validity of driving licences and insurance policies held by employees wishing to use vehicles on official business.

3.5.2 Car Hire

3.5.2.1 Car Hire is not permitted by those who receive a company car allowance.

3.5.2.2 Car hire must be booked through the Company's approved supplier.

3.5.2.3 The usual standard of hire vehicles is Group B or Group C, but Group D vehicles are allowed when three or more people are travelling together. Note that cars with manual transmission cars are cheaper than those with automatic transmission.

3.5.2.4 Before driving hire vehicles, the external physical condition of the vehicle should be checked and ensure that this is consistent with the check form in the vehicle. Any anomalies identified (e.g. additional dents or scratches in the bodywork) should be entered on the check form.

3.5.2.5 Money spent on fuel should be claimed using iExpenses – it is incorrect to claim mileage allowance when hiring a car. At the end of hire, **the vehicle must be returned with a full tank of petrol/diesel**. Failure to do this results in the levying of additional costs (in the form of premium charges for fuel) by the car hire company. Any such premium charges levied will be recouped from the individual.

3.5.2.6 UK SBS is charged for car hire at a 24 hour rate. Extra is charged for out of hours (0800 – 1800) delivery/collection. If you do need to set off early in the morning (but will be finished by 1700), consider getting the car delivered at 1730 the previous evening. You will avoid the out of hours charge and just be charged the standard 24 hour rate.

3.5.2.7 Delivery and collection to a home address is more expensive than delivery

and collection to a work address. Where your journey allows, please have the vehicle delivered and collected from your business address.

- 3.5.2.8 Car hire providers often offer a free pickup and drop-off service. They will pick you up (from either home or work), take you to the local depot to begin your hire journey; when you have finished and returned the car to the local depot, they will then take you home/back to work. Consider whether your timescales for travel allow for this option to be used.

3.5.3 Additional Road Travel Expenses

- 3.5.3.1 UK SBS will reimburse necessary and reasonable toll and parking costs; parking fines and driving penalty fines will not be reimbursed.

3.5.4 Taxis

- 3.5.4.1 Taxis should normally only be used for short, local journeys (e.g. transport to or from a railway station) where no public transport is available or where the use of public transport would be difficult (e.g. the transportation of heavy luggage), potentially dangerous (e.g. travel late at night) or not cost-effective (e.g. because of the extra travel time it would entail). The actual, receipted cost of taxis will be reimbursed.

3.6 Air Travel

- 3.6.1 Air travel must be pre-authorised prior to departure. For cost and environmental grounds, Eurostar should be considered, when appropriate.
- 3.6.2 Air travel with a scheduled flying time of under 8 hours must be by economy class. Business class can only be used if ticket flexibility is an essential business requirement.
- 3.6.3 Air travel by business class is acceptable for long-haul flights (with scheduled flying time of 8 hours or more).
- 3.6.4 Those travelling abroad on UK SBS business must ensure that they hold valid passports and, where applicable, visas. Costs associated with visas may be reimbursed; however, any such costs need to be agreed in advance with the line manager.
- 3.6.5 The cost of any unavoidable medical expenses (e.g. inoculations) incurred specifically for overseas business trips will also be refunded.
- 3.6.6 In planning itineraries, allowances should be made for adequate periods of recuperation between the stages of long-haul flights and before commencing duty after such flights.

3.7 Gratuities

- 3.7.1 Gratuities will only be reimbursed if the service charge is included in the price of the meal.

3.8 Exceptions

- 3.8.1 It is recognised that not all circumstances where necessary expenses could be incurred are covered in this policy. Accordingly, where the normal application of the rules might lead to someone being out of pocket, special arrangements may be made. Specifically, there may be rare occasions when it is not possible to restrict expenditure to the indicative upper limits for subsistence; for example, a shortage of accommodation caused by some special event in a city or high "captive audience" meal prices in a remote location. The written authorisation of a function Director should accompany any claims that exceed guideline limits, and, wherever possible, be obtained prior to travel. Both the individual concerned, and their line management, are accountable for such decisions and every effort should be made to organise business in such a way that the necessity for incurring excess expenditure is avoided.
- 3.8.2 There may be some events attended by employees where exceptions will recur. In these circumstances, the Director responsible may issue a blanket clearance confirming the higher indicative rates that will apply in such a case. Employees should make themselves aware of, and ensure that they comply with, any such special arrangements.

3.9 Special Cases

- 3.9.1 There are some unusual circumstances where special allowances or dispensations from the normal rules are allowed. These are recounted in this section.

3.9.2 Allowances during sickness

- 3.9.2.1 If a person is ill whilst away from the office on official business, and is unfit for travel, the cost of any accommodation and meal expenses incurred during the period of illness will be reimbursed in accordance with normal arrangements.

3.9.3 Disability dispensation

- 3.9.3.1 Those who, because of a proven disability, cannot travel by public transport or hire car may travel by private motor vehicle.

3.10 Employee Expense Claims

- 3.10.1 Employees are individually responsible for the accuracy and compliance of their expense claims and the expenditure decisions taken that lead to costs being incurred. Such decisions should only be taken by employees once they have familiarised themselves with this travel and subsistence policy.
- 3.10.2 Claims should be submitted via iExpenses no later than 4 weeks after the date of return from travel (this is to ensure the accuracy of financial information and efficient processing). Late submission may result in disallowance of a claim.
- 3.10.3 All necessary fields in iExpenses must be completed by the employee in

order for the claim to be considered for approval. Full details of expenditure must be provided to support any expense claims. This includes explanations for any items of unusual expenditure.

3.10.4 Receipts must be submitted to support all claims for actual expenditure.

Whenever possible, electronic receipts (including scans and photocopies) should be submitted rather than paper copies.

3.10.5 Any claims that are considered unreasonable, or any expenses that could have been avoided had a journey been better planned, may be disallowed in whole or in part.

3.10.6 An employee making an expense claim is providing confirmation that:

- The journey(s) to which the claim relates was necessary for the pursuance of UK SBS business **and**
- due account has been taken of cost-effectiveness in the travel arrangements **and**
- the expenses claimed are reasonable and in compliance with UK SBS's travel and subsistence policy **and**
- the claim has been completed fully, and all necessary details and explanations have been provided.

4. Implications of the Policy

- 4.1 There are no training, resource or equipment requirements of this policy and no implications or effect on other policies or processes.

5. Monitoring and Review

- 5.1 The Finance Director is responsible for reviewing the application of this policy. The Corporate Finance team will make sufficient financial information available to senior managers on a timely basis to allow them to review
- (i) expenses claimed by employees,
 - (ii) expenditure incurred via the corporate travel system and
 - (iii) car hire expenditure.

6. Who to Contact about the Policy

- 6.1 In case of queries please contact Corporate Finance.

Annex A: Subsistence claim limits and mileage rates

MEAL LIMITS

Maximum meal expenses – upper limits for actual, receipted expenditure	
Breakfast meal limit (where not included in B&B tariff)	£7.50 inc.VAT
Lunch meal limit	£15 inc.VAT
Evening meal limit	£25 inc.VAT
Note: these are upper limits for the maximum amount of actual, receipted expenditure for which an employee will be reimbursed. This is <u>not</u> a flat-rate allowance.	

ACCOMMODATION LIMITS

Maximum accommodation rates – upper limits for actual, receipted expenditure	
London (including breakfast)	£170 inc. VAT
Elsewhere in the UK (including breakfast)	£120 inc. VAT
Overseas	Local currency Equivalent of £120
Note: these are upper limits for the maximum amount of actual, receipted expenditure for which an employee will be reimbursed. This is <u>not</u> a flat-rate allowance.	

MILEAGE RATES FOR USE OF PRIVATE VEHICLES

Mileage rates if employee does not receive a car allowance	
Cars	
Higher mileage rate (first 10,000 annual business miles)	45p per mile
Lower mileage rate (over 10,000 miles)	25p per mile
Motorcycle mileage rate	
Motorcycle mileage rate	24p per mile
Bicycle mileage rate	
Bicycle mileage rate	20p per mile
Mileage rates if employee receives a car allowance	
Cars only	25p per mile

A **Passenger Supplement** of 5p per mile may be claimed in conjunction with the mileage allowance in respect of each official passenger conveyed, whose fare would otherwise be payable from UK SBS funds.