

# Request for Proposal



**Open Procedure – Request for Proposal (RFP) on behalf of UK Research and Innovation (UKRI)**

**Subject: Advanced CI Training and Certification**

**Sourcing Reference Number: CSP25042**

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## Section 1 – About UK Shared Business Services

### Putting the business into shared services

We're a leading public sector shared service centre owned by the Department for Science, Innovation and Technology (DSIT), the Department for Energy Security and Net Zero (DESNZ), the Department for Business and Trade (DBT) and UK Research and Innovation (UKRI).

As a public sector company providing services to the public sector, we have valuable insight and a deep understanding of how the sector operates. This means that our services are fit for purpose, right from the start.

We provide a range of efficient, scalable, and expert Finance, HR and Payroll, Procurement and Business IT services helping the advancement of the UK's economy and society. We are motivated by a desire to deliver high quality, efficient and reliable service to over 25,000 civil and public servants, employed by our clients.

We work closely with our stakeholders to harness the potential of our expertise, evolving technology and to realise the maximum benefit from shared services. We aim to be a trusted partner, recognised for delivering value and benefits for our owners and to support the work they do for the people of the UK.

Our dedicated teams take immense pride in their contributions, driving value for the UK economy and its taxpayers. At our core, we firmly believe in the power of partnership and expertise. By aligning with the values of our owners, we actively contribute to achieving optimal outcomes through shared services.

By 2029, we aim to be the leading UK public sector business service provider, efficiently and securely managing multiple technology platforms and delivering a great user experience for our customers.

### **Privacy Statement**

At UK Shared Business Services (UKSBS) 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 UKSBS 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.ukpbs.co.uk/use/pages/privacy.aspx>

For details on how the Contracting Authority protect and process your personal data please follow the link below:

<https://www.ukri.org/privacy-notice/>

## **Section 2 – About the Contracting Authority**

### **UK Research and Innovation (UKRI)**

Operating across the whole of the UK and with a combined budget of more than £6 billion, UK Research and Innovation represents the largest reform of the research and innovation funding landscape in the last 50 years.

As an independent non-departmental public body UK Research and Innovation brings together the seven Research Councils (AHRC, BBSRC, EPSRC, ESRC, MRC, NERC, STFC) plus Innovate UK and a new organisation, Research England.

UK Research and Innovation ensures the UK maintains its world-leading position in research and innovation. This is done by creating the best environment for research and innovation to flourish.

For more information, please visit: [www.ukri.org](http://www.ukri.org)

### **Science and Technology Facilities Council (STFC)**

STFC is a world-leading multi-disciplinary science organisation. Their research seeks to understand the Universe from the largest astronomical scales to the tiniest constituents of matter, yet creates impact on a very tangible, human scale.

<https://stfc.ukri.org>

## Section 3 – Working with the Contracting Authority

### Bidder Guidance issued by the Cabinet Office

#### PSQ Explainer (for Bidders) broken into three Parts

Public procurement is governed by regulations to ensure that procurement delivers value for money, competition, transparency and integrity.

The Procurement Specific Questionnaire (PSQ) has been designed to help Contracting Authorities ensure that Bidders share the right information when participating in a procurement. This is separate from the formal tender submission (on how the bidder proposes to meet the tender requirements). The PSQ consists of three parts:

##### **Part 1 - confirmation of core Bidder information:**

Bidders participating in procurements will now be expected as a Condition of Participation to register on a central digital platform (CDP). Bidders can submit their core Bidder information and, where a procurement opportunity arises, share this information with the Contracting Authority via the CDP. It is free to use and will mean Bidders should no longer have to re-enter this information for each public procurement but simply ensure it is up to date and subsequently shared. The CDP is available at <https://www.gov.uk/find-tender>. Part 1 provides confirmation that Bidders have taken these steps.

##### **Part 2 - additional exclusions information (see sub notes 1-3):**

Procurement legislation provides for an 'exclusion regime' and a published 'debarment' list to safeguard procurement from Bidders who may pose a risk (for example, due to misconduct or poor performance). Bidders must submit their own (and their connected persons (i) exclusions information via the CDP. This includes self-declarations as to whether any exclusion grounds apply to them and, if so, details about the event or conviction and what steps have been taken to prevent such circumstances from occurring again.

As part of a procurement, Bidders will need to also share additional exclusions information for any Bidders that they are relying on to meet the procurement's conditions of participation. These could either be consortium members or key sub-contractors (but excludes any guarantors). These Bidders are 'associated persons' and their exclusions information must be shared with the Contracting Authority. We recommend this is done by ensuring that associated persons register, submit and share their information via the CDP (like the prime/main bidder).

In addition to the sub-contractors who are being relied on to meet the conditions of participation (who are associated persons), Bidders will need to share an exhaustive list of all their intended sub-contractors, which will be checked against the debarment list.

- 1) Connected persons are persons who exercise (or have a right to exercise) significant influence or control over the bidder and those over which the bidder exercises (or has the right to exercise) significant influence or control. This includes majority shareholders, directors and shadow directors, parent and subsidiary companies and predecessor companies. The majority of the exclusion grounds state that they apply to the bidder or a connected person of the bidder.

- 2) Associated persons are sub-contractors or consortium members who are being relied on by the prime/main supplier to satisfy the conditions of participation in the particular procurement. This does not include guarantors, even if they are relied on to meet conditions of participation. The main supplier may be an excluded or excludable supplier by virtue of an exclusion ground applying to an associated person (see section 57 of the PA2023). A supplier can also be an excluded or excludable supplier by virtue of an exclusion ground applying to a connected person of an associated person, for example, a director of an associated person of the supplier.
- 3) Where a supplier intends to use sub-contractors, not all of these sub-contractors will be associated persons. Only if a sub-contractor is relied on to meet conditions of participation, will they be both an associated person and an intended sub-contractor.

### **Part 3 - Conditions of participation:**

The Contracting Authority sets conditions of participation which Bidders must satisfy in order to be awarded a public contract. They can relate to the Bidders legal and financial capacity or their technical ability.

Some of the information requested in the PSQ will be for information purposes only. Other information will be assessed by the Contracting Authority. This might include a pass or fail mechanism, or a threshold which the Bidder must meet.

Bidders should note that the Contracting Authority have legislative duties to publish certain information which relate to the Supplier in their contract award notices. This information includes, but is not limited to:

- details of the winning Supplier's associated persons
- details of the winning Supplier's connected person information
- for certain procurements over £5 million, details of unsuccessful bidders

#### **The central digital platform: video guides and user manuals now available**

Onboarding for Contracting Authorities to the Find a Tender Service started from 27 January 2025. This is being coordinated across the public sector through implementation leads and sectoral leads.

From 24 February 2025, suppliers will be able to register on the central digital platform - the new enhanced Find a Tender service.

To help prospective suppliers and other stakeholders prepare we have published video guides with accompanying PDF user manuals. These guides will give you an overview of the platform, the registration process, and the information you will be asked to provide so that when the time comes your registration will be straightforward.

You can access the videos through our dedicated TPP GOV.UK supplier page: **[Transforming Public Procurement - information and guidance for suppliers](#)**, where you will also find links to the associated user manuals.

You can also access each of the videos directly using the links below:

For suppliers: How to register your organisation and first administrator on Find a Tender in three easy steps

<https://youtu.be/lnjCa4swtjA>

For suppliers: detailed walkthrough - how an administrator completes and updates supplier information

<https://youtu.be/i4ZdbMGRqeQ>

For buyers and suppliers: How to use the central digital platform (enhanced Find a Tender service) a short guide for everyone

<https://youtu.be/TSfxoZoV3yl>

For Contracting Authorities: an overview of the new transparency commitments and illustration of notices on enhanced Find a Tender service

<https://youtu.be/AIKmv5Siltc>

Please note that if you want to bid for public procurement contracts then as from the 24 February there is one place - the new Find a Tender Service - to find all public sector tenders and other notices; and that prospective suppliers must register if they want to bid for any contracts.

Bidder guidance: Where a Bidder is unsure or requires any clarification, they should check with the Central Digital Platform Team via the help options provided

Section 3 – Contact details		
3.1.	Contracting Authority Name and address	UK Research and Innovation (UKRI) Polaris House North Star Avenue Swindon SN2 1FL
3.2.	Buyer	Karam Bhogal
3.3.	Buyer contact details	<a href="mailto:coreservices@uksbs.co.uk">coreservices@uksbs.co.uk</a>
3.4.	Maximum value of the Opportunity and Term	<p>The total contract value shall not exceed £1,382,633.00 excluding VAT over the entire contract period should the option to extend be utilised.</p> <p>The maximum budget for year 1 of this contract is £482,633.00 excluding VAT.</p> <p>Following review and depending on further budget allocation, an option to extend for a further 3 years (on a 1+1+1 basis) may be considered. Each year will be valued at £300,000.00 ex VAT</p> <p>Please note, any extension period, will only cover STFC requirements highlighted in the specification and UKRI CI CoE requirements will cease in November 2026.</p> <p>However, this is an estimated spend and is not committed unless the extension is utilised.</p> <p>There is no guaranteed spend attached to this contract, the budget is an estimated maximum budget and is subject to budgetary approvals.</p>
3.5.	Process for the submission of clarifications and Bids	<p><b>All correspondence shall be submitted within the Messaging Centre of the eSourcing Portal. Guidance on how to obtain support on using the eSourcing Portal can be found in these documents. 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.</b></p>

Section 3 – Timescales		
3.6.	Date of posting of Tender Notice on the CDP	Friday 22 <sup>nd</sup> August 2025

3.7.	Latest date / time RFP clarification questions shall be received through the eSourcing Portal	Thursday 18 <sup>th</sup> September 2025 11:00 am
3.8.	Latest date / time RFP clarification answers should be sent to all Bidders by the Buyer through the eSourcing Portal	Tuesday 23 <sup>rd</sup> September 2025 11:00 am
3.9.	Latest date and time for Bidder to request access to the RFP documents	Wednesday 1 <sup>st</sup> October 2025  10:00 am
3.10.	Latest date and time RFP Bid shall be submitted through the eSourcing Portal ( <b>the Deadline</b> )	Wednesday 1 <sup>st</sup> October 2025 11:00 am
3.11.	Anticipated notification and issue of Bidder Assessment Summaries of proposed Contract award decision to successful and unsuccessful Bidders.	Monday 20 <sup>th</sup> October 2025
3.12.	Anticipated publication of the Contract Award Notice to be published after Bidder Assessment Summaries are issued to all bidders, which will start the standstill period.	Monday 20 <sup>th</sup> October 2025
3.13.	Anticipated commencement of Contract	Monday 10 <sup>th</sup> November 2025
3.14.	Completion of Contract	Monday 9 <sup>th</sup> November 2026 with the optional extension 1+1+1
3.15.	Anticipated publication of Contract Details Notice	Within 30 Days of Contract Award
3.16.	Bid Validity period required	90 Days

## Section 4 – Specification and about this Procurement

### **Pre-Market Engagement**

Pre-Market Engagement was not carried out for this tender as this is re-tender activity and there is a well-defined market.

### **Introduction**

[UK Research and Innovation \(UKRI\)](#) and [Science and Technology Facilities Council \(STFC\)](#) who are a council within UKRI are seeking to procure a strategic delivery partner to support the establishment and scaling of its Continuous Improvement (CI) Centre of Expertise (CoE).

This partner will provide expert-led training, coaching, and consultancy services to build CI capability across UKRI's 8,000+ workforce, embedding a culture of continuous improvement, innovation, and operational excellence.

The supplier will work in close collaboration with the UKRI CI CoE and STFC to co-design and deliver these services, ensuring alignment with [UKRI's strategic objectives](#) and operational context.

### UKRI

A key outcome of this partnership will be to build UKRI's internal capability to deliver [Lean Competency System \(LCS\)](#) accredited CI training in-house. This includes supporting the development of a modular training suite, preparing for LCS accreditation, and delivering train-the-trainer programmes to enable sustainable, internally led CI capability development.

This procurement follows internal discovery research and aligns with UKRI's People and Culture Change Programme. It builds on successful models such as that implemented by the [Science and Technology Facilities Council \(STFC\)](#), which combines internal CI leadership with external specialist support.

The services will contribute directly to UKRI's strategic objective to become a [world-class, efficient, effective, and agile organisation](#). The supplier will be expected to deliver high-quality, accredited training, tailored coaching, and strategic consultancy that enables UKRI staff to lead and sustain impactful CI initiatives. In addition, the supplier will support the facilitation of rapid improvement events (e.g., Kaizen and 5S), contribute insights and recommendations to inform the strategic direction of the CI CoE, and enable the development of a coordinated portfolio of CI initiatives across UKRI. The supplier will also collaborate in the design and development of a comprehensive CI toolkit and knowledge hub, ensuring that resources are practical, scalable, and aligned with UKRI's operational context and strategic goals.

### STFC

The STFC has a maturing CI programme which combines internal CI leadership with external specialist support. The requirement is for the training, coaching and certification of the STFC's staff to develop skills and aptitudes to:

- Deliver a suite of improvement projects, further embed a culture of Continuous Improvement (CI) and a mindset shift to improvement proactivity and facilitate the removal of waste in processes.
- Pilot new ways of working. Redesigning future operating models, project delivery methods and culture to improve the effectiveness of the delivery of products, processes and services, and value to both internal and external customers. STFC would like to evolve a culture which encourages experimentation, innovation, developing deep trust with their people, generating radical transparency and enabling distributed authority. In these areas, STFC want to train and deploy methods such as business agility and agile methodologies, where appropriate.

The services will contribute directly to STFC's strategic objective to operate [a world-class organisation](#). The supplier will be expected to deliver high-quality, accredited training, tailored coaching, and strategic consultancy that enables STFC staff to lead and sustain impactful CI initiatives. In addition, the supplier will support the facilitation of rapid improvement events (e.g., Kaizen and 5S), contribute insights and recommendations to inform the strategic direction of the STFC CI programme, and enable the development of a coordinated portfolio of CI initiatives across STFC. Further, the supplier will further provide accredited training and coaching in business agility and agile practices.

### **Background to the Requirement**

## Strategic Context

UKRI is undertaking a major transformation to embed a CI culture, mindset, and way of working. This initiative is directly aligned with UKRI's strategic objective to become a world-class, agile, effective, and efficient organisation.

The establishment of a UKRI CI CoE is a key enabler of this transformation, providing the structure, capability, and leadership needed to scale CI across all councils and business functions in UKRI.

## History & Drivers

In 2024, UKRI conducted an internal CI Discovery Research Exercise to assess the current state of CI across the organisation. The findings revealed a strong appetite for CI, with 75% of participants expressing a positive perception of CI and a desire to engage further. However, the research also identified significant barriers, including:

- Time and resource constraints
- Need for strategic and operational alignment
- CI being undertaken informally, voluntarily, and seen as additional work
- Inconsistent tools, language, and approaches.

These challenges have limited UKRI's ability to realise the full benefits of CI, such as improved efficiency, reduced workload overburden, and enhanced employee engagement.

The internal UKRI staff survey (2024) further reinforced the need for CI, highlighting that staff reported unmanageable workloads and change fatigue.

These insights, combined with external pressures such as the [Government Efficiency Framework](#) (2023) and the National Audit Office (NAO) report on [UK Research and Innovation: providing support through grants](#) (2025), underscore the urgency of embedding CI as a core organisational capability.

The STFC, one of the 9 councils in UKRI, has a maturing continuous improvement programme, having inaugurated its CI programme in 2021. More than 100 staff have been trained at advanced LSS level to date (YB or GB), delivering significant return on investment in external training provision. The STFC intends to further grow and widen the reach of the initiative across its functions and staff, such that all staff can access, participate in and benefit from the CI initiative.

## UKRI Recent Developments

In response, UKRI's Operational Leadership Team endorsed the creation of a CI CoE. The CoE will lead the delivery of a multi-year strategy and roadmap (2025–2028) focused on:

- Building CI capability through accredited CI training and CI project coaching
- Developing a CI toolkit and knowledge hub
- Facilitating rapid improvement events and workshops
- Supporting the transition of major UKRI transformation programmes into Business-as-Usual (BaU) via embedding a culture of CI
- Establishing a portfolio approach to CI project tracking and reporting.

The CI CoE will also play a critical role in enabling UKRI to achieve LCS accreditation and deliver certified CI training in-house from financial year 2026/27 onwards.

### **Business Activities and Functions**

UKRI is a complex, public sector organisation comprising nine councils and multiple corporate functions. Business activities span research funding, infrastructure delivery, policy development, and operational support. The CI CoE will work across this landscape to:

- Standardise CI approaches and language
- Build local CI capability through a hub-and-spoke model
- Support councils and functions in identifying and delivering CI initiatives
- Promote collaboration and knowledge sharing through a UKRI-wide CI Community of Practice.

STFC is Research Council employing 3000+ staff. Business activities span research funding, infrastructure delivery, policy development, and operational support, similar to other UKRI councils. In addition, STFC hosts the National Laboratories, with the majority of STFC staff performing scientific, engineering and technical roles that support delivery of STFCs science objectives.

### **CI Organisation and Staffing**

#### UKRI

The CI CoE is currently led by the UKRI Head of CI, supported by one UKRI CI Lead. The business case for the CI CoE includes funding for an additional CI Lead and a third-party delivery partner to accelerate delivery and build internal capability. The long-term vision is to transition to a sustainable, internally led model by 2027/28.

The delivery partner will work closely with the UKRI CI CoE team to:

- Co-design and deliver training, coaching, workshops and consultancy services
- Support the development of internal trainers and facilitators
- Provide strategic insight to inform the CoE's roadmap and service model.

There is already a strong foundation in place. In UKRI over 1,360+ employees have completed the CI Basics training delivered by the UKRI CI CoE Team, gaining foundational knowledge in Lean and CI principles. The UKRI CI CoE delivers 2–3 CI Basics courses each month, ensuring a steady pipeline of trained staff across councils and functions. In addition, there are trained CI practitioners embedded in various parts of the organisation, contributing to local improvement efforts and acting as advocates for CI.

#### STFC

The STFC CI team currently comprises the STFC Head of CI and two STFC CI Leads, with a total combined effort of 1.2 FTE.

The delivery partner will work closely with the STFC CI team to:

- Co-design and deliver training, coaching, facilitation and consultancy, focussing interventions on current organisational requirements and expected benefits/impacts
- Support the development of internal facilitators and CI practitioners, with a focus on delivering a portfolio that generates a healthy mix of benefits (financial, time and wellbeing).
- Provide strategic insight to inform the STFC's CI delivery plan and roadmap.

There is already a strong foundation in place. More than 500 individual STFC staff have engaged with training through the STFC CI programme to date, many of whom have completed the UKRI CI basics training. More than 100 staff have completed YB or GB training, and around 1/3 of these (to date) have delivered improvement projects with significant benefit to the organisation. Council-wide communication and celebration of improvements and practitioners is mature.

UKRI and STFC also benefits from an existing CI SharePoint Site and CI Toolkit and an active and growing UKRI CI Network with over 1,300 members from across UKRI, which brings together staff from across the organisation to share learning, collaborate on initiatives, and build a sense of community around improvement. This network plays a key role in sustaining momentum and promoting best practice.

Importantly, there is strong senior leadership support and advocacy for CI across UKRI. Leaders at all levels recognise the value of CI and Lean principles in helping UKRI become a more efficient, effective, and agile organisation.

As benefits have been realised and the STFC CI programme has matured, wider promotion and adoption of CI practices has been observed.

This commitment provides a solid platform for the next phase of CI development, which will be supported through this procurement.

### **Aims & Objectives**

The primary aim of this procurement is to accelerate the establishment and impact of the UKRI CI CoE by securing a strategic and tactical delivery partner who will work collaboratively with UKRI and STFC to:

- **Embed a culture of CI** across UKRI's councils and business functions, enabling staff at all levels to identify, lead, and sustain meaningful improvements in their work (UKRI & STFC).
- **Build internal CI capability and confidence**, equipping UKRI employees with the knowledge, tools, and support to apply LSS methodology and techniques to real-world challenges (UKRI & STFC).
- **Deliver high-quality, LCS accredited CI training**, including Lean Six Sigma (LSS) LCS 1a YB, and LCS 1b/1c GB programmes (depending on organisational

needs and demand), that are tailored to UKRI's and STFC's diverse operational and scientific environment (UKRI & STFC).

- **Support the development of a sustainable in-house training model**, including preparation for UKRI accreditation with LCS, development of the training syllabus and resources, and the delivery of train-the-trainer programmes to enable UKRI to independently deliver accredited LCS training in the future (UKRI).
- **Provide coaching and mentoring of UKRI and STFC employees completing CI initiatives** ensuring alignment with UKRI's strategic priorities and enabling the measurement and reporting of tangible benefits, including efficiency gains, improved service delivery, and enhanced employee engagement (UKRI & STFC).
- **Contribute to the design and evolution of the UKRI and STFC CI CoE strategy and roadmap**, providing expert insight, feedback, and innovation to inform the direction and priorities of the CoE and STFC CI programme (UKRI & STFC).
- **Enable rapid, team-based problem solving** through the facilitation of CI workshops and rapid improvement events (e.g., Kaizen, 5S), helping teams to address operational challenges and build momentum for change (UKRI & STFC).
- **Develop and co-create a comprehensive CI toolkit and knowledge hub**, including frameworks, templates, case studies, and learning resources that are accessible, practical, and aligned with UKRI's organisational context (UKRI).
- **Introduce STFC leaders to the benefits of LSS, business agility and agile delivery methods**, creating a collective understanding and language, encouraging sponsorship of improvement projects, and increasing the likelihood of embedding a culture of CI, empowerment of teams, distributed authority and radical transparency (STFC).
- **Upskill STFC staff to deliver improvements and day-to-day work following agile project delivery methodology**, ensuring pragmatic execution of CI projects with an appropriate sense of urgency (STFC).
- **Facilitate the delivery of a coordinated portfolio of CI initiatives**, ensuring alignment with STFC's strategic delivery plan and enabling the measurement and reporting of tangible benefits, including efficiency gains, improved service delivery, and enhanced employee engagement (STFC).

These aims are underpinned by a commitment to partnership working, knowledge exchange, and long-term capability building, ensuring that UKRI and STFC are equipped to sustain and scale CI practices beyond the life of the contract.

#### UKRI

See aims and objectives section.

#### STFC

##### **Embedding Continuous Improvement**

The key performance indicators include:

- All senior leader attendees have an awareness of the LSS tools, techniques and the Define-Measure-Analyse-Improve-Control (DMAIC) framework, along with the Agile project delivery methods. Understand how these methods could benefit STFC and their departments.
- Most senior leader attendees agree that the LSS/Agile approach would add value to the organisation, can identify and sponsor relevant CI opportunities
- All improvement projects undertaken by the trained cohorts are successfully completed, follow the DMAIC process, and the individuals feel confident to lead a future project

### **Redesigning our future ways of working**

The key performance indicators include:

- All attendees understand how the different business agility frameworks, methodologies and thinking discussed on the course(s) can benefit their Directorates/Departments and are able to develop plans to implement these ideas.
- All trained teams have a knowledge of delivering projects using the Agile methodology and understand the cultural aspects to embed it successfully.

### **Scope**

#### **High-Level Scope of the Procurement**

This procurement seeks to appoint a strategic delivery partner to support the UKRI CI CoE and STFC CI team in delivering a range of services that build CI capability, embed a CI culture and mindset, and enable measurable improvements across UKRI and STFC. The services will include:

- Delivery of accredited Lean Six Sigma (LSS) LCS 1a YB, and LCS 1b/1c GB Training Programme (UKRI & STFC)
- Post-training coaching to support CI project delivery by training participants (UKRI & STFC)
- Facilitation of rapid improvement events (e.g. Kaizen, 5S) (UKRI & STFC)
- Development of CI toolkits, templates, and learning resources (UKRI)
- Support for UKRI achieving and maintaining LCS accreditation (UKRI)
- Strategic consultancy to inform the UKRI CI CoE and STFC roadmap and service model (UKRI & STFC)
- Delivery of training in facilitation and change management for staff leading change initiatives (STFC)
- Agile training for individuals (STFC)
- Agile coaching for pilot teams (STFC)
- Delivery of lean business agility overview for leadership (STFC)

#### **Potential Demand Over the Contract Period**

The anticipated demand for **UKRI** includes:

- Training for up to 132 employees Lean Six Sigma (LSS) LCS 1a YB, and LCS 1b/1c GB programmes aligned to LCS principles and standards.
- Up to 550 hours of coaching support across Lean Six Sigma (LSS) LCS 1a YB, and LCS 1b/1c GB projects
- Up to 35 days for delivering 10–15 CI workshops and rapid improvement events
- Up to 300–350 hours for development of a modular CI training suite and toolkit to support Lean Six Sigma (LSS) LCS 1a YB, and LCS 1b/1c GB training provision
- Up to 280 hours to support UKRI LCS accreditation and train-the-UKRI trainer programmes

The anticipated demand for **STFC** includes:

- Training, coaching and relevant accreditation for up to 36 employees (across 3 cohorts) in YB and 10 employees (1 cohort) in GB LSS (length of course and content to be developed collaboratively with supplier)

- Up to 250 hours of coaching support across YB and GB projects
- Delivery of 3 x 3-day CI workshops or rapid improvement events (9 days total)
- Training, coaching and relevant accreditation/certification for up to 36 employees (across 3 cohorts) in facilitation and change management for staff leading change initiatives
- Delivery of introductory agile training for c. 20 individuals (1-2 cohorts), with ICAgile Fundamentals certification (or similar/equivalent)
- Up to 120 days total agile coaching, to be deployed as needed across 3 teams.
- Delivery of 1 day training for c. 24 individuals in senior leadership positions, introducing lean agile concepts.
- Up to 230 hours coaching/strategic consultancy for CI leads at STFC or department/directorate level, to establish, inform and review local CI roadmaps and strategies

Demand may fluctuate based on organisational priorities, staff availability, and uptake of services. So, there is a need to be flexible and there is scope to flex the estimation above to provide a portfolio of CI coaching, training, workshops, projects and consultancy hours based on business needs and demand.

### **Flexibility and Expansion**

The supplier must demonstrate flexibility in potentially scaling up and/or down delivery of the proposed requirements in the specification, as well as be adaptable to meet emerging requirements.

- Evolving organisational needs and strategic priorities
- Seasonal or programme-specific demand (e.g. transformation programme transitions)
- New training formats or delivery methods (e.g. hybrid or digital-first)
- Additional councils or functions requesting bespoke support

The number of cohorts and supplier hours specified are indicative and provide an estimation of UKRI's anticipated needs, but there is scope for this to be adapted based on changing organisational needs and demand.

### **Exclusions**

The following are explicitly out of scope:

- Delivery of non-CI related coaching, training, workshops, or support for the delivery of major transformation programmes
- Full outsourcing of CI services beyond the agreed scope
- Technology solutions unrelated to CI tracking, reporting, or delivery
- Services not aligned with UKRI's CI CoE and STFC strategy or values.

### **Known Constraints**

- Training should be delivered in person, predominantly at the locations listed in Appendix C or virtually, depending on organisational needs
- All materials must be compatible with UKRI's digital platforms (e.g. Microsoft 365, SharePoint) and UKRI's accessibility policies

- Supplier must comply with UKRI's internal policies and procedures.
- Supplier must work within the allocated budget envelope and reporting requirements.

### **Period of the Agreement**

For UKRI and STFC the contract will commence in November 2025 and run for a period of 12 months.

Following review and depending on further budget allocation, an option to extend for a further 3 years (on a 1+1+1 basis) may be considered. Please note, any extension period, will only cover STFC requirements highlighted in the specification and UKRI CI CoE requirements will cease on the November 2026.

### **Security and GDPR Requirements**

- The supplier must comply with UKRI's information security policies and hold Cyber Essentials certification (or equivalent).
- All data handling must be GDPR-compliant, with appropriate safeguards for personal and sensitive information.
- Any systems or platforms used must ensure secure storage, access control, and auditability.

### **Requirement**

The supplier will be required to deliver a comprehensive programme of CI services in partnership with the UKRI CI CoE. These services will support the development of CI capability, embed a CI culture and mindset, and enable measurable improvements across UKRI's councils and corporate functions.

#### **Requirement 1: LCS Training Programme and Certification**

For UKRI the supplier will deliver 11 cohorts of LCS accredited 1a training (approx. 132 participants) over a 12-month period, with flexibility to substitute one cohort for LCS 1b & LCS 1c training if required.

For STFC the supplier will deliver 3 cohorts of LSS YB training (approx. 36 participants) over a 12-month period, with an additional 1 cohort (12 participants) for GB training.

The items listed below provide an estimate of UKRI's and STFC's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements.

### **Scope of Work**

#### **Training Format**

- Delivered in person at UKRI sites where possible, predominantly at the locations listed in Appendix C, with virtual delivery considered as a secondary option.

- Training is structured and facilitated by LCS certified practitioners, ensuring alignment with LCS principles, best practices and standards.
- Designed with clear learning objectives aligned with LCS certification standards.
- Interactive in content and activities, incorporating discussions, practical exercises based on case studies, simulations, and group work to promote learning-by-doing.
- Project-focused, enabling each participant to apply their learning by delivering a live improvement project within their team or department.
- Designed with a clear assessment strategy.

### **Learning Outcomes and Indicative Training Contents**

- Understand the origins and development of Lean thinking (LCS 1a YB). Ford, Taylor, Deming, TWI, Toyota Production System, Ohno, Shingo, Womack & Jones.
- Explain underpinning and related concepts (LCS 1a YB). Scientific thinking, systems thinking, continuous improvement, Six Sigma, Theory of Constraints.
- Identify key Lean/CI principles and frameworks (LCS 1a YB). Womack & Jones' Five Principles, PDCA, DMAIC.
- Recognise core Lean elements (LCS 1a YB). Value vs. waste, value stream, flow, pull, mura, muri, muda.
- Understand the human and strategic dimensions of Lean (LCS 1a YB). Cultural change, leadership, strategic alignment.
- Understand purpose, customer/stakeholder value identification and understanding (LCS 1b GB). Kano; VoC.
- Mapping techniques (LCS 1b GB). Current state and future state; value stream mapping, SIPOC; process mapping, spaghetti diagrams; customer journey; swim lane.
- Understand quality approaches (LCS 1b GB). Seven quality tools (cause-and-effect diagram/fishbone, check sheet, control chart, histogram, Pareto chart, scatter diagram, flow chart/run chart); mistake proofing, poka yoke; checklists; variation reduction & six sigma.
- Apply problem solving techniques. (LCS 1b GB). FMEA; means-ends analysis; soft systems methodology; 8D problem solving; DMAIC; PDCA; A3; Five Whys; CATWOE; Four Frame approach; Drill Down; Cause & Effect (Fishbone).
- Apply planning and communication techniques (LCS 1b GB). A3; visual management; communication boards; project management and organisation.
- Understand demand and capacity analysis and understanding techniques (LCS 1b GB). Value/failure demand identification; ToC five steps.
- Understand Workplace organisation and optimisation techniques (LCS 1c GB). 5S; cell design; layout; 3P – production, preparation, process; ergonomics
- Understand Standard operations: SOPs; standards; leader-standard-work (LCS 1c GB). TWI (job instruction, job methods).
- Apply visual management and performance measures (LCS 1c GB). A3; display boards; Andon; team communications.
- Understand scheduling and capacity planning (LCS 1c GB). Theory of Constraints; pull systems; Kanban; Heijunka; drum buffer rope; CONWIP; runners-repeaters-strangers
- Apply enablers for flow (LCS 1c GB). Takt time; TPM; SMED; OEE; demand management; mistake proofing/poka yoke; activity timing

- Understand Management and planning (LCS 1c GB). Policy deployment/Hoshin Kanri; project management; performance management; Scrum
- Understand people, teams and sustainability (LCS 1c GB). Leadership; coaching; change management; facilitation; team management; personal communications; TWI (job relations)

### **Assessment framework and Certification**

Participants must demonstrate:

- Understanding of contents through a multiple-choice test or short written assessment.
- Completion of a live improvement project, with evidence of applied learning and measurable impact.
- Engagement in 4–5 hours (LCS 1a YB) and 8-10 hours (LCS 1b,1c GB) of coaching to support project delivery and reinforce CI principles.
- Coaching should be tailored to the complexity of each project and the participant's development needs.
- The ability to reflect on their learning and explain how CI thinking was applied in their project.

Certification must be awarded upon successful completion of the training and assessment of the participant's CI project.

### **Requirement 2: CI Coaching and mentoring (Post-Training Support for CI Projects)**

The supplier will provide structured coaching support to LCS 1a YB participants and LCS 1b/1c GB participants (permitting demand) to ensure successful delivery of their follow-on CI projects. Coaching is a critical component of embedding learning, building confidence, and enabling the practical application of CI principles and techniques across UKRI.

The items listed below provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements.

### **Scope of Work**

#### **Coaching for LCS 1a (YB) training programmes Participants**

- Provide approximately 4–5 hours of one-to-one coaching per participant across up to 11 Yellow Belt cohorts (approx. 110 - 132 participants).
- Coaching should be delivered flexibly across the project lifecycle and tailored to the complexity of each project and the participant's experience level.

#### **Coaching for LCS 1b and LCS 1c (GB) Participants**

- Provide approximately 8–10 hours of coaching per participant (approx. 10–12 participants).

- Support should focus on more advanced project scoping, data capturing and analysis, stakeholder engagement, improvements identification, evaluation and implementation.

### **Coaching Approach**

- **Individualised:** Coaching must be tailored to the participant's role, project context, and development needs.
- **Project-Focused:** Support should help participants apply CI tools and techniques to their live projects, including problem definition, root cause analysis, solution design, and implementation.
- **Developmental:** Coaches should build participants' confidence, leadership skills, and ability to influence change within their teams.
- **Flexible Delivery:** Coaching should be available in a mix of formats (e.g. virtual, in-person, predominantly at the locations listed in Appendix C) to suit participant needs and availability.

### **Requirement 3: Support LCS Accreditation and Implementation**

The supplier will provide up to 280 hours (equivalent to 35 days) of expert consultancy and delivery support to enable UKRI to achieve LCS accreditation and build internal capability to deliver accredited CI training from UKRI financial year 2026/27 onward. This work will establish a sustainable, in-house CI training programme aligned with LCS standards.

The items listed below provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements.

### **Scope of Work**

#### **Accreditation Preparation**

- Conduct a readiness assessment and gap analysis to evaluate UKRI's current in-house CI training provision against LCS standards.
- Provide hands-on support in preparing the UKRI LCS accreditation submission, including documentation, evidence collation, and alignment with LCS levels (e.g. 1a–1c).

#### **Train-the-Trainer Programme**

- Design and deliver a tailored "train-the-trainer" programme for UKRI designated internal trainers.
- Equip internal trainers with the skills, knowledge, and confidence to deliver LCS 1a–1c training to LCS standards.
- Include observation, feedback, and mentoring of internal trainers to ensure consistency and quality in training delivery.

#### **Training Syllabus and Materials Development**

- Co-develop a modular CI training syllabus aligned with LCS levels.
- Create and refine training materials including slide decks, facilitator guides, case studies, training learner workbooks, training artefacts and assessment tools.
- Ensure materials are accessible and adaptable for both in-person, predominantly at the locations listed in Appendix C, and virtual delivery and reflect UKRI's operational and scientific context.

### **Knowledge Transfer and Sustainability**

- Provide coaching, mentoring and advisory support to the UKRI CI CoE throughout the LCS accreditation process.
- Support the development of internal quality assurance mechanisms for UKRI to maintain LCS standards post-accreditation.

### **Requirement 4: UKRI CI CoE Strategic Development & STFC Strategic Coaching and Consultancy**

#### UKRI

For UKRI the supplier will provide up to 64 hours (equivalent to 8 days) of strategic consultancy support to assist in the establishment, positioning, and long-term development of the UKRI CI CoE. This work will help define the strategic direction of the CI CoE and ensure it is aligned with UKRI's organisational goals, public sector best practices, and the evolving needs of a complex, federated research environment.

#### STFC

For STFC the supplier will provide individual coaching, deployed flexibly based on individual requirements but based on 1h per working week across 5 staff (230 hours total), to be delivered virtually, or in person, predominantly at the locations listed in Appendix C, depending on organisational needs, around topics such as:

- How to coach other staff who are delivering or participating in change projects
- Creating departmental CI strategies, delivery plans and effective reporting (light touch governance)
- Stakeholder relationships, particularly senior leadership
- Departmental learning and capability mapping.

In STFC many of our CI leads within departments are not CI specialists, rather they have been deployed from other roles to support the strategic implementation of a CI programme, using their knowledge of the departments and networks to achieve effective change. These staff have the local knowledge to effect change but require support and guidance from experts to realise the CI ambitions of their staff.

The items listed below provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The

supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements."

### **Scope of Work**

#### **Strategic Review and Development**

- Review the existing UKRI CI CoE Strategy and Roadmap.
- Provide recommendations to refine and strengthen the strategy, ensuring it is actionable, measurable, and aligned with UKRI's and STFC strategic objectives.

#### **Define Strategic Pillars and Success Criteria**

- Identify and articulate the core strategic pillars of the UKRI CI CoE (e.g. capability building, cultural change, innovation enablement, performance improvement).
- Define UKRI and STFC success criteria and performance measures (e.g. KPIs, OKRs) to track progress and impact.

#### **Culture and Mindset Development**

- Provide recommendations to embed a UKRI CI culture and mindset across UKRI.
- Advise on approaches to foster a UKRI CI culture, mindset and way of working, including leadership behaviours, staff engagement, and change enablement.

#### **Benchmarking and Best Practice Alignment**

- Ensure the strategy is informed by leading CI practices in research innovation, science, and public sector organisations.
- Provide benchmarking insights and case studies to support strategic decision-making and positioning of the CI CoE.

#### **Requirement 5: Development of CI Frameworks, Tools & Templates**

The supplier will provide between 300–350 hours of expert support to design and deliver a comprehensive UKRI CI Toolkit and Knowledge Hub. This resource will enable consistent, scalable, and sustainable CI practices across UKRI and serve as a central CI reference point for UKRI employees.

The items listed below provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements."

### **Scope of Work**

The items listed below are provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand.

The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements."

### **CI Toolkit and CI Knowledge Hub Development**

- Design and develop a suite of high-quality, accessible, reusable, and user-friendly resources to support CI delivery across UKRI.
- Resources must be suitable for both CI specialists and general staff, and adaptable for in-person and virtual use.

### **Core Components**

- **Frameworks and Models:** Standardised CI models such as DMAIC, PDCA, Lean Six Sigma, and Agile integration.
- **Templates:** Practical tools including project charters, stakeholder maps, A3 reports, and action plans.
- **Visual Tools:** Process maps, value stream maps, fishbone diagrams, and other diagnostic and planning tools.
- **Training Materials:** Slide decks, facilitator guides, learner workbooks, and playbooks to support CI training and workshops.
- **Learning Activities:** Exercises and simulations to reinforce the application of theoretical concepts in training delivery.

### **Case Studies and Storytelling**

- Incorporate real-world case studies, storyboards, and testimonials from UKRI's own CI projects.
- Showcase successful initiatives, lessons learned, and tangible impacts to inspire engagement and promote peer learning.

### **Design and Accessibility**

- Ensure all materials are:
  - Easy to use and visually engaging.
  - Accessible to a diverse range of users across roles and disciplines.
  - Aligned with public sector standards and industry best practices.
  - Developed in collaboration with the UKRI CI CoE to ensure strategic relevance.

### **Requirement 6: Kaizen Events, Rapid Improvement Events, 5S and CI Workshops**

The supplier will design and facilitate 10–15 interactive CI workshops across UKRI, and STFC delivered over approximately 35 days. These workshops will be tailored to the specific needs of local teams and aligned with UKRI's strategic priorities. They will serve as high-impact interventions to address operational challenges, build CI capability, and foster a culture of continuous improvement.

The items listed below provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The

supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements.

### Scope of Work

#### Workshop Types

- **Kaizen Events:** Structured, time-bound sessions (typically 2–3 days) focused on identifying root causes and implementing immediate improvements in a specific process or operational area.
- **Rapid Improvement Events (RIEs):** Fast-paced workshops aimed at streamlining processes, eliminating waste, and improving service delivery. Often result in redesigned workflows or new standard operating procedures.
- **5S Workshops:** Practical sessions applying the 5S methodology (Sort, Set in Order, Shine, Standardise, Sustain) to physical or digital environments to improve organisation, safety, and efficiency.
- **Bespoke CI Workshops:** Custom-designed sessions based on team-specific needs, such as stakeholder engagement, process mapping, root cause analysis, or innovation sprints.

#### Delivery Expectations

- Workshops must be team-based, hands-on, and outcome-oriented, with a strong emphasis on participation, ownership, and practical application.
- Each event must include:
  - **Pre-event planning:** Scoping, data collection, stakeholder alignment.
  - **Facilitation:** Led by CI practitioners with a strong track record in public sector, research, or scientific environments.
  - **Post-event follow-up:** Action planning, coaching, and impact tracking to ensure implementation and sustainability of outcomes.

#### Documentation and Knowledge Sharing

- Outputs from each workshop must be documented and shared with the UKRI CI Centre of Expertise.
- Documentation should include workshop objectives, activities, outcomes, action plans, and lessons learned.
- These records will contribute to UKRI's CI Knowledge Hub and support the evidence base for embedding a CI culture.

#### **Requirement 7: Suite of CI Projects resulting from requirements 1; 2 & 6**

The supplier will support the delivery and coordination of a suite of CI projects across UKRI and STFC. These projects will be directly linked to LCS 1a YB, LCS 1b/1c GB training cohorts, coaching interventions, and CI workshops (e.g. Kaizen, RIEs, 5S). The aim is to ensure that learning is applied in real-world contexts, delivering measurable improvements and reinforcing CI capability development.

The items listed below are provide an estimate of UKRI's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand.

The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements.

## **Scope of Work**

### **Project Identification and Alignment**

- Support the identification and scoping of CI projects aligned with:
  - LCS 1a YB, LCS 1b/1c GB training cohorts
  - Post-training coaching
  - CI workshops and events
- Ensure projects are real-world, impact-driven, and address priority areas identified by teams or leadership.

### **Project Oversight and Integration**

Provide light-touch oversight to ensure projects are:

- Clearly defined with objectives, timelines, and success criteria.
- Aligned with UKRI's strategic goals (e.g. efficiency, collaboration, innovation).
- Integrated with coaching and workshop outputs to reinforce learning and application.

### **Requirement 8: STFC specific training and coaching**

The items listed below provide an estimate of STFC's anticipated requirements. However, they may be adapted in response to evolving organisational needs and demand. The supplier must demonstrate flexibility in scaling delivery up or down as needed and be adaptable to meet emerging requirements."

## **Scope of Work**

### **1) Change management and facilitation skills training**

The supplier will deliver 3 cohorts of training (approx. 36 participants) over a 12-month period.

### **Training Format**

- Delivered in person at STFC sites where possible, predominantly at the locations listed in Appendix C, with virtual delivery considered as a secondary option.
- Training is structured and facilitated by suitably qualified practitioners, ideally with some expertise working in scientific public sector organisations.
- Designed with clear learning objectives aligned with certification standards (where relevant).
- Interactive in content and activities, incorporating discussions, practical exercises based on case studies, simulations, and group work to promote learning-by-doing.
- To allow time for the interactive nature of these sessions, we anticipate the training will last approx. 3 days per cohort.

### **Learning Outcomes and Indicative Training Contents**

- The VUCA environment, why we need to manage change.
- Key enablers (e.g., new behaviours, new ways of thinking, empowering teams, servant leadership, psychological safety, growth mindset, ask vs. tell, etc.)
- Key techniques (communication, vision, stakeholder engagement, embedding the change)
- Frameworks and tools which can help us to apply the thinking (e.g., facilitation techniques, KanBan etc.)
- State-of-the-art thinking in this area, stimulating intrapreneurial/entrepreneurial mindsets and encouraging radical change.

### **Assessment framework and Certification**

Certification is preferred but not essential.

#### **2) Overview of agile methods for effective and efficient project delivery training**

The supplier will deliver 1 cohort of training to approximately 20 staff (depends on size of team).

### **Training Format**

- Delivered in person at STFC sites where possible, predominantly at the locations listed in Appendix C, with virtual delivery considered as a secondary option.
- Training is structured and facilitated by suitably qualified practitioners, ideally with some expertise working in scientific public sector organisations.
- Designed with clear learning objectives aligned with certification standards.
- Interactive in content and activities, incorporating discussions, practical exercises based on case studies, simulations, and group work to promote learning-by-doing.

To allow time for the interactive nature of these sessions, we anticipate the training will last approx. 2 days per cohort.

### **Learning Outcomes and Indicative Training Contents**

- Introduction to agile terminology, mindset and behaviours
- Methodology-agnostic – having completed the training, participants should feel comfortable with the key concepts and behaviours required to participate in agile teams, without focus on one particular method or framework
- Key enablers (e.g., behaviours, leadership, roles)
- Key techniques (tools e.g., KanBan)
- State-of-the-art thinking in this area, stimulating intrapreneurial/entrepreneurial mindsets and encouraging radical change.

### **Assessment framework and Certification**

Relevant certification (e.g., ICAgile) on completion.

### **3) Coaching for agile methods to effective and efficient delivery**

In the past, STFC have found a training intervention does not necessarily allow teams to get up and running with agile ways of working, particularly when deployed on atypical agile projects (e.g., hardware delivery). From previous experience, successful teams have benefitted from coaching from trained and experienced agile scrum masters.

Coaching should be tailored to the requirements of the teams, but should typically include:

- Introduction of ceremonies, with the coach initially taking on the scrum master role
- Individual coaching for the team scrum master and product owner, ensuring the team is well-supported once coaching support ends.
- Team working agreements and health checks, ensuring teams are working on the right things, as decided by the team.
- Support for team members leading experiments with ways of working.
- Definition of and collection of metrics such that the coaching intervention is proven to be a success.

Expertise in science and technology in the public sector would be beneficial.

The level of coaching support required will vary depending on the maturity of the team and the level of intervention needed, to be determined by the coach and the team once the contract has been awarded. However, it should be costed based on 40 days support per team, across 3 teams (120 days total). The 40 days would be deployed over the course of a minimum 6-month period, allowing the team time to adapt to new ways of working, and to evaluate their improvements.

### **4) Delivery of lean business agility overview for leadership training**

The supplier will deliver 1 cohort of training to approximately 24 senior leaders across STFC.

#### **Training Format**

- Delivered virtually to ensure ease of access for staff at all STFC sites.
- Training is structured and facilitated by suitably qualified practitioners, ideally with some expertise working in scientific public sector organisations.
- Designed with clear learning objectives.
- Interactive in content and activities, incorporating discussions, practical exercises based on case studies, simulations, and group work to promote learning-by-doing.

To allow time for the interactive nature of these sessions, we anticipate the training will last approx. 1 day.

#### **Learning Outcomes and Indicative Training Contents**

Leaders should leave the training with confidence to understand the language, philosophy and power of a Lean Agile culture, and their vital role in making it a success.

- Overview of Lean Agile Thinking
- Purpose-driven
- Focus on customer
- Explore versus exploit - incremental versus radical change
- Learning organisations and psychological safety
- Leadership and empowerment
- Incremental improvement using DMAIC
- Breakthrough thinking, deploying strategy, and responding to change (use of objectives and key results (OKRs))
- Continuous engagement and creating the right environment where workers are inspired, and can thrive and create
- An introduction to Lean Management Systems
- Sponsoring initiatives and measuring outcomes:
- Leader standard work
- Lean Systems Thinking
- Linking initiatives to the strategy and measuring success (Business Model Canvas, Value Streams, Strategy Map, Balanced Scorecard, OKRs)

### **Additional Information**

#### **Supplier Profile Requirements**

To ensure high-quality delivery across all CI services, the supplier must demonstrate the following capabilities and expertise:

#### **Qualifications and Expertise**

- Documented expertise delivering CI training, coaching, and consultancy in complex, federated, or public sector environments.
- Certification to at least LSS Black Belt level for all trainers and coaches involved in delivery.
- Formally accredited with LCS as certified training provider
- ICAgile or equivalent certified for trainers delivery Agile aspects of Requirement 8
- Demonstrable success in supporting organisations through LCS accreditation.

#### **Methodological Knowledge**

- Strong working knowledge of Lean, Six Sigma, Agile, and Systems Thinking methodologies.
- Ability to apply and adapt CI frameworks such as DMAIC, PDCA, 5S, and value stream mapping to diverse operational and scientific contexts.

#### **Training and Facilitation**

- Expertise designing and delivering accredited CI training with a focus on practical application and learner engagement.
- Skilled in facilitating interactive workshops (e.g. Kaizen, RIEs, 5S) that generate measurable outcomes, benefits and build internal capability.

#### **Coaching and Mentoring**

- Ability to provide structured, developmental coaching tailored to individual and project needs.
- Strong interpersonal and mentoring skills, with the flexibility to support a wide range of roles and disciplines.

### **Strategic and Advisory Support**

- Expertise in developing CI strategies, toolkits, and service models aligned with organisational goals.
- Ability to provide benchmarking insights and best practice recommendations relevant to research, innovation, science and public sector settings.

### **Collaboration and Communication**

- Ability to work closely with the UKRI CI CoE and adapt delivery to UKRI's federated structure and strategic priorities.
- Strong communication and stakeholder engagement skills, with a commitment to knowledge transfer and sustainable capability building.

### **Monitoring and Reporting**

The supplier will be required to provide regular, structured reporting and participate in progress meetings with the UKRI Contract Manager and STFC Contract manager at a frequency to be agreed. This will ensure transparency, accountability, and continuous alignment with UKRI's strategic objectives and delivery expectations.

### **Reporting Requirements**

Suppliers must maintain and submit concise, data-driven reports covering the following areas:

- **Training Delivery:** Attendance, completion rates, and pre-/post-course evaluation summaries.
- **Coaching Activity:** Maintain coaching logs tracking hours delivered, topics covered, and progress made.
- **Workshop Delivery:** Number and type of CI workshops delivered, key outputs, and follow-up actions.
- **CI Projects:** Progress updates, alignment with UKRI Strategy, training/coaching, and measurable outcomes.
- **Financials:** Budget usage, forecasting, and variance reporting.
- **Continuous Improvement:** Lessons learned, feedback received, and recommendations for refinement.

### **Assessment Framework**

The supplier must work with the UKRI CI CoE to develop and apply an assessment framework to evaluate the overall effectiveness of CI services and activities. This should include:

- Clear success criteria and performance indicators for each service area (e.g. training, coaching, workshops, projects).
- Mechanisms to gather and analyse qualitative and quantitative feedback from participants and stakeholders.
- Periodic assessment summaries to inform continuous development and strategic decision-making.
- Integration of assessment findings into regular reporting and stakeholder updates.

**Engagement and Oversight**

- Weekly progress meetings will be held with the UKRI Contract Manager to review delivery status, address risks or issues, and agree on next steps.
- All reporting must be aligned with UKRI’s performance tracking framework and support evidence-based evaluation of supplier performance and programme impact.

**Expected Outcomes**

Service Area	Expected Outcomes
<b>LCS Training Programme and Certification</b>	Participants certified to LCS 1a and LCS 1b/1c level descriptors; real-world CI projects in progress and completed; increased CI capability; training aligned with UKRI/STFC strategy.
<b>Post-Training CI project coaching and mentoring</b>	Participants apply CI frameworks, tools and techniques confidently and capably; projects deliver measurable improvements; coaching supports capability and culture development.
<b>LCS Accreditation and Train-the-Trainer Support</b>	UKRI achieves LCS accreditation; proficient internal trainers; modular training syllabus and materials developed; sustainable in-house delivery and re-accreditation model.
<b>CI Strategy Development</b>	Clear CI strategy and roadmap; defined strategic pillars and success criteria; recommendations to embed CI culture, mindset and way of working; performance measures.
<b>CI Toolkit and Knowledge Hub Development</b>	Comprehensive, user-friendly toolkit and knowledge hub; including frameworks, templates, case studies, and learning resources, reusable templates and materials; real-world case studies; accessible to all staff.
<b>CI Workshops (Kaizen, RIEs, 5S, Bespoke)</b>	10-15 workshops delivered; measurable improvements achieved; increased staff engagement; documented outputs, action plans and outcomes.
<b>CI Project Portfolio Support</b>	Coordinated CI projects aligned with training and coaching; measurable benefits tracked; increased visibility of CI impact via benefits measured and reported.

<b>Change management and facilitation training</b>	Individuals have knowledge and understanding to confidently navigate change, and to ensure they support teams working through change. The facilitation toolkit is seen more widely within STFC.
<b>Agile training</b>	Individuals are confident in understanding the behaviours and mindset needed to work in agile teams. Evidence of adoption of specific tools in STFC.
<b>Agile coaching</b>	Teams are confident in continuing with new ways of working; individuals are confident to share their learning more widely across STFC

### **Key Performance Indicators (KPIs)**

#### **Training**

- % of participants trained and certified.
- % of participants completing pre- and post-training evaluations.
- Average training satisfaction score (e.g. content, delivery, relevance).
- % of participants applying learning in a live CI project.

#### **CI Coaching**

- Total coaching hours delivered
- % of coached participants completing their CI project.
- Average coaching satisfaction score.
- % of coaching sessions resulting in measurable project progress.

#### **Agile Coaching**

- Total coaching hours delivered (agile teams).
- Average coaching satisfaction score.
- Benefits delivered (financial and non-financial), ROI.

#### **Workshops**

- Number of CI workshops delivered (Kaizen, RIEs, 5S, bespoke).
- % of workshops resulting in implemented improvements.
- % of workshop participants reporting increased confidence in using CI tools.

#### **CI Projects**

- Number of CI projects initiated, in progress, and completed.
- % of projects achieving defined success criteria (e.g. time, cost, quality improvements).
- % of projects aligned with UKRI strategic priorities.

- Reporting CI projects tangible and intangible benefits such as but not limited to ROI and wellbeing impact.

### **LCS Accreditation**

- Progress toward LCS accreditation (milestones achieved).
- Number of internal trainers certified and delivering accredited training.
- % of in-house training delivered post-accreditation.

### **CI Resources & Knowledge Hub**

- Number of CI tools, templates, and resources developed and published.
- % of resources accessed or downloaded by staff.
- User satisfaction with toolkit usability and relevance.

### **Engagement and Culture**

- Number of UKRI teams supported through CI activities.
- Uptake and engagement with CI communications (e.g. newsletter opens, event attendance).
- Growth in CI Network membership and participation.
- % of staff reporting increased awareness or confidence in CI practices (via pulse surveys).

### **Monitoring and Evaluation**

- Timeliness and completeness of supplier reporting.
- % of services evaluated using the CI assessment framework.
- Number of lessons learned and the related improvement initiatives implemented
- Stakeholder satisfaction with overall CI programme delivery.

### **Accessibility and assisted digital**

As a public sector body, UKRI has a [legal requirement](#) for its websites and services to meet accessibility standards. Meeting these standards not only helps members of the public to access our work, but also UKRI colleagues who use these websites and services on a daily basis.

As a supplier you will be aware of how your product/service aligns with the relevant Government Digital Service (GDS) standards and guidelines to ensure compliance, usability, and accessibility for all users. Suppliers providing digital services must ensure and provide evidence that their technologies comply with the most recent version of the Web Content Accessibility Guidelines (WCAG) AA level (currently 2.2 is compulsory for government services) and that these are tested for usability.

*Guidance (this is called web accessibility, but that is not restricted to websites, it includes all digital user facing services) -*

<https://ukri.sharepoint.com/sites/thefsource/SitePages/web-accessibility.aspx>

### Appendix B - Term / Acronym

Term / Acronym	Full Form / Definition
5S	Sort, Set in Order, Shine, Standardise, Sustain – a workplace organisation method
A3	A structured problem-solving and reporting tool
Agile	A flexible, iterative approach to project management and product development
BaU	Business as Usual – standard operational activities post-transformation
CATWOE	Customers, Actors, Transformation, Worldview, Owner, Environment – a soft systems analysis tool
CI	Continuous Improvement
CoE	Centre of Expertise
DMAIC	Define-Measure-Analyse-Improve-Control – a Six Sigma process improvement cycle
FMEA	Failure Modes and Effects Analysis – a structured approach to identify and mitigate risks
FTE	Full-time equivalent
GDPR	General Data Protection Regulation – UK/EU data protection law
Kaizen	A Japanese term for continuous, incremental improvement
KPIs	Key Performance Indicators – metrics used to evaluate success

LCS 1a* YB	Lean Competency System Level descriptors – Awareness Yellow Belt
LCS 1b* GB	Lean Competency System Level descriptors – Diagnosis & Analysis Green Belt
LCS 1c* GB	Lean Competency System Level descriptors – Improvement & Implementation Green Belt
LCS	Lean Competency System – a structured accreditation framework for CI training
Lean	A methodology focused on reducing waste and increasing value
LSS	Lean Six Sigma – a methodology combining Lean and Six Sigma principles
Muda, Mura, Muri	Lean terms for waste (Muda), unevenness (Mura), and overburden (Muri)
NAO	National Audit Office – UK body responsible for auditing public spending
OKRs	Objectives and Key Results – a goal-setting framework
PDCA	Plan-Do-Check-Act – a four-step iterative method for CI
Poka Yoke	Mistake-proofing – a Lean technique to prevent errors
RIE	Rapid Improvement Event – a short-term, focused CI workshop
SIPOC	Suppliers, Inputs, Process, Outputs, Customers – a high-level process mapping tool
Six Sigma	A data-driven methodology for eliminating defects and improving quality

STFC	Science and Technology Facilities Council is one of the councils within UKRI
TPS	Toyota Production System – origin of Lean manufacturing principles
TWI	Training Within Industry – foundational training method in Lean
UKRI	UK Research and Innovation
UKSBS	UK Shared Business Services – provides procurement and business services to UKRI
VoC	Voice of the Customer – method to capture customer needs and expectations

While coloured belts are commonly used to represent different levels of expertise in Six Sigma and Lean Six Sigma, the Lean Competency System (LCS) uses a level-based framework to describe an individual's knowledge and practical capability according to learning outcomes detailed in the section "Learning Outcomes and Indicative Training Contents" of Requirement 1.

There is no globally standardised definition for each belt level, and the LCS does not provide a direct mapping between its levels and belt colours. However, to maintain consistency and avoid confusion, LCS-accredited organisations that choose to reference belt colours on LCS certificates must adhere to the following guidance, which reflects widely accepted practice:

LCS Level 1a – Lean Awareness

Equivalent to a White/Yellow Belt course (YB)

LCS Level 1b – Diagnosis & Analysis

Part of the equivalent of a Yellow/Green Belt course (GB)

LCS Level 1c – Improvement & Implementation

Also part of the equivalent of a Green Belt course (GB)

This alignment helps provide clarity for learners and employers while preserving the integrity of the LCS framework.

**Appendix C - UKRI and STFC Office Locations**

UK Research and Innovation

Polaris House  
Swindon  
SN2 1FL

UK Research and Innovation  
Caxton House  
Tothill Street  
London  
SW1H 9NA

Research England  
Westward House  
Lime Kiln Close  
Stoke Gifford  
Bristol  
BS34 8SR

Science and Technology Facilities Council  
Chilbolton Observatory  
Drove Road  
Chilbolton  
Stockbridge  
Hampshire  
SO20 6BJ

Science and Technology Facilities Council  
Daresbury Laboratory (DL)  
Keckwick Lane  
Daresbury  
WA4 4AD

Science and Technology Facilities Council  
Rutherford Appleton Laboratory (RAL)  
Harwell Campus  
Didcot  
OX11 0QX

Science and Technology Facilities Council  
Boulby Underground Science Facility  
Boulby Mine  
Saltburn-by-the-Sea

Cleveland  
TS13 4UZ

Science and Technology Facilities Council  
UK Astronomy Technology Centre (UKATC)  
Royal Observatory, Edinburgh  
Blackford Hill  
Edinburgh  
EH9 3HJ

**Social Value**

1. The Supplier will be expected to align to the principles, obligations and aspirations set out in the Social Value Act (2012). The Supplier shall identify and deliver on Social Value initiatives as identified and agreed. The Supplier will be responsible for recording and reporting performance against agreed Social Value scorecards.
2. Based on the Social Value Model UKRI have identified “Equal Opportunity” as the Key Theme most relevant to this Contract. Information about the Key Themes is presented in the table below:

Table of Social Value Key Themes:

Key Themes		
Theme:	<b>Equal Opportunity</b>	
Policy Outcome:	Reduce the disability employment gap	Tackle workforce inequality
Delivery Objectives (Activities that):	<ul style="list-style-type: none"> <li>• Demonstrate action to increase the representation of disabled people in the contract workforce.</li> <li>• Support disabled people in developing new skills relevant to the contract, including through training schemes that result in recognised qualifications.</li> <li>• Influence staff, suppliers, customers and communities through the delivery of the contract to support disabled people.</li> </ul>	<ul style="list-style-type: none"> <li>• Demonstrate action to identify and tackle inequality in employment, skills and pay in the contract workforce.</li> <li>• Support in-work progression to help people, including those from disadvantaged or minority groups, to move into higher paid work by developing new skills relevant to the contract.</li> <li>• Demonstrate action to identify and manage the risks of modern slavery in the delivery of the contract, including in the supply chain</li> </ul>

<p>Reporting Metrics:</p>	<ul style="list-style-type: none"> <li>• Total percentage of full-time equivalent (FTE) disabled people employed under the contract, as a proportion of the total FTE contract workforce, by UK region.</li> <li>• Number of full-time equivalent (FTE) disabled people employed under the contract, by UK region.</li> <li>• Total percentage of disabled people on apprenticeship schemes (Level 2, 3, and 4+) under the contract, as a proportion of the all people on apprenticeship schemes (Level 2, 3, and 4+) within the contract workforce, by UK region.</li> <li>• Number of disabled people on apprenticeship schemes (Level 2, 3, and 4+) under the contract, by UK region.</li> <li>• Total percentage of disabled people on other training schemes (Level 2, 3, and 4+) under the contract, as a proportion of the all people on other training schemes (Level 2, 3, and 4+) within the contract</li> </ul>	<ul style="list-style-type: none"> <li>• Total percentage of full-time equivalent (FTE) people from groups under-represented in the workforce employed under the contract, as a proportion of the total FTE contract workforce, by UK region.</li> <li>• Number of full-time equivalent (FTE) people from groups under-represented in the workforce employed under the contract, by UK region.</li> <li>• Total percentage of people from groups under-represented in the workforce on apprenticeship schemes (Level 2, 3, and 4+) under the contract, as a proportion of the all people on apprenticeship schemes (Level 2, 3, and 4+) within the contract workforce, by UK region.</li> <li>• Number of people from groups under-represented in the workforce on apprenticeship schemes (Level 2, 3, and 4+) under the contract, by UK region.</li> <li>• Total percentage of people from groups under-represented in the workforce on other training</li> </ul>
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	<p>workforce, by UK region.</p> <ul style="list-style-type: none"> <li>• Number of disabled people on other training schemes (Level 2, 3, and 4+) under the contract, by UK region.</li> </ul>	<p>schemes (Level 2, 3, and 4+) under the contract, as a proportion of the all people on other training schemes (Level 2, 3, and 4+) within the contract workforce, by UK region.</p> <ul style="list-style-type: none"> <li>• Number of people from groups under-represented in the workforce on other training schemes (Level 2, 3, and 4+) under the contract, by UK region.</li> <li>• Percentage of all companies in the supply chain under the contract to have committed to the five foundational principles of good work.</li> <li>• Number of companies in the supply chain under the contract to have committed to the five foundational principles of good work.</li> <li>• Percentage of the supply chain for which supply chain mapping has been completed to the appropriate tier or to source in order to reduce the risks of modern slavery.</li> <li>• Number of people-hours devoted to supporting victims of modern slavery under the contract.</li> </ul>
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The Contract duration shall be for a period of 12 months with optional extensions of a further 3 years on an annual basis from commencement of the Contract.

**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. The Contracting Authority will not accept any variation to any accepted terms and conditions by any Bidder once the closing date and time for clarifications and the closing date and time for bid submissions has passed. Any failure to rescind modified terms and conditions sent in, will result in the award decision reverting to the second placed Bidder(s) and the original award decision reversed, with the original Bidder award decision bid being excluded from consideration on grounds of false statements made in the bid received, resulting in a non-compliant bid having failed a Mandatory pass / Fail question.

**Debarment**

The Contracting Authority will consult the Governments Debarment list in regard to its relevance to your bid(s) submission, under the procurement Regulations that apply to this procurement. This consultation may result in your bid submission failing to be considered

further and your bid(s) being excluded from further consideration under this procurement, dependent upon the nature of the Contracting Authorities findings. By participating in this procurement opportunity and submitting a bid submission, all Bidders who are successful in being awarded a contract(s) agree that they shall be naturally obliged during the award stage, prior to contract signature, to advise the Contracting Authority immediately if any circumstances surrounding the award decision change, in consideration of this requirement.

### **Conflicts of Interest (Col)**

The Contracting Authority and UKSBS take the matter of Col very seriously as part of its procurement due process life cycle, not only its own staff and third parties associated with this procurement, but also with those Bidders competing. The Contracting Authority will manage and monitor Col throughout this procurement lifecycle, so as due process is compliantly undertaken and will address and suitably manage any Col, as and when these are identified.

### **Capability and Capacity to undertake the procurement**

The Contracting Authority will only allocate suitably qualified and experienced staff to undertake this procurement, based upon the complexity and the value of this procurement opportunity. All procurements follow standard operating procedures and policies as well as peer and line manager reviews (as applicable) as part of the procurement lifecycle.

### **Bid submissions and interfaces between the CDP and E-Sourcing platform (unique identifier information)**

The Contracting Authority require all Bidders (and as applicable other parts of the Bidders organisation see Bidder guidance) who wish to be considered for this opportunity to have registered on the CDP, so as the Contracting Authority can utilise the unique identification number and the content that is required by the Contracting Authority to undertake its evaluation of all bids received. This not only treats all Bidders equally but also aligns to the Governments "tell us once" approach so as to reduce the burden on Bidders in regard to each opportunity that arises. If the CDP is down and would prevent any Bidder from uploading its information in good time before the closing date and time for receipt of bids and the CDP cannot guarantee that this will be functional before the closing time and date, then the Contracting Authority will provide the necessary documentation to the Bidder upon request so as these can be received either via the E-sourcing platform as an attachment or an alternative email based way of submission. Please ensure that you contact the Contracting Authority immediately if this situation arises, if the CDP is anticipated to impact on your ability to make a submission and please do ensure that you allow the Contracting Authority a sufficiency of time to be able to provision this information. Please note that the Contracting Authority will be unable to accept any submission in regard to this area, that is provided for reasons other than is clearly stated above.

## Section 5 – Evaluation model

### 5.1. Introduction

- 5.1.1. The evaluation process will be conducted to ensure that Bids are evaluated fairly to ascertain which Bidders can demonstrate the required legal and financial capacity and the technical skills and if appropriate, experience to ensure the successful performance of the Contract.
- 5.1.2. The evaluation team may comprise staff from UKSBS and the Contracting Authority, and any specific external stakeholders or third parties that the Contracting Authority deem required.

### 5.2. Evaluation of Bids

- 5.2.1 Evaluation of Bids shall be based on a Conditions of Participation questionnaire held by self-certified Bidder inputs on the CDP as well as within this procurement documentation including additional questionnaire questions (as applicable) plus the Award criteria as clearly defined in the e-sourcing tool and procurement documentation.

Bidders should note that the responsibility of the accuracy of any bid submission and associated information that is presented to the Contracting Authority, as part of the Conditions of Participation questionnaire via the CDP and as submitted against specific questions, relevant and proportionate to the procurement documentation via the eSourcing Portal including Award based submissions, shall remain the sole responsibility of the Bidder(s) to ensure that this reflects and satisfies the requirements of the procurement documentation, when received by the Contracting Authority in order to carry out the due process of evaluation. For absolute clarity should a failing by any Bidder be as result of the information being incorrect, incomplete, inaccurate, false and or misleading as received after the closing date and time, then the Contracting Authority shall be under no obligation to clarify this, and this may result in any Bidder being excluded from any award under this procurement opportunity dependent upon the specific subject matter.

- 5.2.2 If the Contracting Authority find that any Bidders proposed bid that has a reliance on other parties e.g. a PSC, and Associated Person and or Subcontractor will result in a failed condition of bidding this opportunity, then the bidder will be allowed to provide evidence in regard to self-cleaning. If the grounds for self-cleaning are not to the absolute satisfaction of the Contracting Authority, then an alternative e.g. Subcontractor must be provided must be provided within 7 days from a formal request to do so via the Contracting Authority. The Contracting Authority will not permit any revision and re submission to affect the original commercial price, that was provided in the Bidders submission. The replacement will then be subject to the specific non-commercial criteria, as was clearly articulated within the evaluation criteria within these procurement documents.

Any Bidder failing to provide evidence of self-cleaning to the absolute satisfaction of the Contracting Authority within the above reasonable and proportionate time set by the Contracting Authority, will result in a bid submission failing to be considered further and your bid(s) being excluded from further consideration under this procurement.

- 5.2.3 The Contracting Authority reserve the right to not enter into any Contract with any Bidder that has an organisation in its bid submission, that is on the Government Debarment list. Please ensure that your organisation and any other organisation you are bidding with are not on the Debarment list before submitting a bid for this procurement opportunity, by completing the information required on the CDP.

### 5.3. CONDITIONS OF PARTICIPATION QUESTIONNAIRE

- 5.3.1. The Conditions of Participation Questionnaire shall be marked against the following Conditions of Participation pass / fail and scoring criteria.

In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, that cannot be regulatorily rectified e.g. a PSC or subcontractor being replaced, or not providing to the absolute discretion of the Contracting Authority any evidence in regards to self-cleaning that any Bidder provided in its bid or potentially under formal clarification then the Contracting Authority reserves the right to exclude the Bidder from further consideration and will only provide an assessment summary to the extent that the tender was assessed against the criteria before it was identified as failing to meet this requirement. The Contracting Authority will not be providing full assessment summaries in these instances but will discharge the balance of its regulatory obligations under this procurement opportunity.

<b>Conditions of Participation Pass/fail criteria via the Central Government Digital Platform (CDP)</b>		
<b>Evaluation Envelope</b>	<b>Q No.</b>	<b>Question subject</b>
<b>Procurement Specific Questionnaire: Potential Supplier Information</b>		
<b>Qualification Questionnaire Part 2: Exclusion Grounds</b>		
Part 1, 2 and 3	CDP	Main Bidder details / Consortia / SPV / Partnerships / PSC / Subcontractors / Associated and Connected persons that create the organisational make-up of the Bidder Mandatory and Discretionary grounds for exclusion and debarment information as provided within the Central Governments Digital Platform (CDP).
<b>Qualification Questionnaire Part 3: Conditions of Participation Questions (General and Project Specific via the eSourcing Platform)</b>		
Part 1	PSQ_1	Organisation Name
Part 1	PSQ_2	CDP / Unique identifier number
Part 1	PSQ_3	Bidding status
Part 1	PSQ_5	Debarment List
Part 1	PSQ_6	CDP Download Submission
Part 2A	PSQ_7	Associated Persons Conditions of Participation Reliance
Part 2B	PSQ_11	List of Intended Sub-Contractors
Part 3A	PSQ_13	Financial Capacity Conditions of Participation
Part 3A	PSQ_14	Supplier Guarantor
Part 3A	PSQ_15	Insurance
Part 3A	PSQ_15.1	Insurance in Place

Part 3A	PSQ_17	Data Protection
Part 3A	PSQ_18	Relevant experience and contract examples
Part 3A	PSQ_19	Experience of sub-Contractor management
Part 3A	PSQ_21	Health and Safety
Part 3B	PSQ_30	Modern Slavery Statement
Part 3B	PSQ_32	Confirmations
Part 4	SEL1.10	Information Security
Part 4	SEL2.12	UK General Data Protection Regulation
Part 4	SEL2.19	Contracts with suppliers from Russia or Belarus
Part 4	SEL2.20	Non-UK or Non-Treaty state suppliers and subcontracting arrangements
Part 4	SEL2.21	Subcontracting UK or Treaty based suppliers
Part 4	FOI1.1 – 1.2	Freedom of Information / EIR / Supplier Assessment Summaries
Part 4	DEC1.1	Declaration
	In the event of a Bidder failing to meet the requirements of a Mandatory pass / fail criteria, the Contracting Authority reserves the right to Exclude the Bidder and not consider evaluation of the any of the Conditions of Participation questionnaire stage scoring methodology, nor the Award stage scoring methodology or Mandatory Pass / Fail criteria.	

- 5.3.2. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.
- 5.3.3. The evaluation model below shall be used for this RFP which will be determined to two decimal places.
- 5.3.4. Questions marked 'for information only' do not contribute to the scoring model.
- 5.3.5. During the evaluation stage, only Bidders who achieve a Pass for all the Mandatory and Discretionary requirements of the Conditions of Participation questionnaire e.g. Excluded or Excludable and PSC (notwithstanding any Debarment status) within the RFP as well as procurement specific questions, will be considered for a contract award. A failure to meet the Conditions of Participation questionnaire requirements depending upon the nature and any such available resolution of the failure, may result in exclusion from the procurement opportunity.

#### 5.4. AWARD questionnaire

- 5.4.1. The award questionnaire shall be marked against the following Mandatory or discretionary pass / fail criteria. Each Mandatory pass / fail question includes a clear definition of the requirements of a successful response to the question.

Award Pass / Fail criteria		
Evaluation Envelope	Q No.	Question subject
Part 5	AW1.1	Form of Bid
Part 5	AW1.2	Bid validity period
Part 5	AW1.3	Certificate of bona fide Bid

Part 5	AW3.2	Conflict of Interest Declaration
Part 5	AW3.2.1	Conflict of Interest Declaration and Supporting Information
Part 5	AW4.1	Compliance to the Contract Terms and Conditions
Part 5	AW4.2	Changes to Contract Terms
Part 5	AW6.1	Compliance to Specification
Technical	PROJ1.1	Accessibility and assisted digital
Commercial	AW5.3	Firm and Fixed Price
Commercial	AW5.4	Maximum Budget
-	-	Request for Proposal response – received on time within the 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 exclude the Bidder and not consider evaluation of the any of the Conditions of Participation questionnaire stage scoring methodology, nor the Award stage scoring methodology or Mandatory pass / fail criteria.		

- 5.4.2. The Award stage of due process shall be marked against the following Award criteria to establish the Most Advantageous Tender(s) (MAT).
- 5.4.3. The evaluation model below shall be used for this RFP which will be determined to two decimal places.
- 5.4.4. Any questions marked 'for information only' do not contribute to the scoring model.
- 5.4.5. Do not exceed the page limits specified within each of the Non-Commercial criteria, any additional content provided beyond the specified page limit will not be considered or scored during the evaluation process. Where Bidders include a cover page and/or annex, this will be taken into consideration within the page limit and therefore this is discouraged. Where a Non-Commercial criterion requires an additional attachment such as an organogram or risk register, Bidders are to note the eSourcing Portal only permits 1 document upload per question therefore Bidders must attach their response as a Zip folder.

## Award 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 RFP. The Contracting Authority considers these weightings to be in line with existing best practice for a procurement opportunity of this type.

Evaluation Envelope	Q No.	Question subject	Maximum Marks	
			Overall	Breakdown
Commercial	AW5.1	Price	20%	20%
Technical	PROJ1.2	Understanding and Delivery Approach	80%	30%
Technical	PROJ1.3	Team composition, skills, expertise, and capacity		20%
Technical	PROJ1.4	Training Programme and Certification Detail and Evaluation		20%
Technical	PROJ1.5	Social value		10%

## Award Evaluation of criteria

### Non-Commercial Elements

Each question will be evaluated 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. As there will be multiple evaluators their individual scores and commentary will be recorded, then a consensus meeting will be convened by the evaluators to determine your score. Note this will include a chairperson or lead and all evaluators are of equal status.

### Example

Evaluator 1 scored your bid as 60

Evaluator 2 scored your bid as 60

Evaluator 3 scored your bid as 40

The convened meeting came to a consensus that the final recorded score to given to your submission against this question should be 60, with the justification and reasons for this score recorded.

Once the consensus process has been finalised, all justifications recorded and all non-priced scores are agreed, this will then be subject to an independent commercial moderation review.

**Commercial Elements** will be evaluated on the following criteria.

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.

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:

(Maximum marks available in this example being 12.5)

Bidder A Score =  $50000/50000 \times 12.5 = 12.5$

Bidder B Score =  $50000/80000 \times 12.5 = 7.81$

Bidder C Score =  $50000/100000 \times 12.5 = 6.25$

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.

The lowest score possible is 0.

The scores achieved for the Non-Commercial and Commercial Criteria will be combined to give a Bidders total score and ranking.

### Award criteria in the event of a tied place for an award decision

If as a result of the application of the aforementioned scored criteria applicable to Commercial and Non-Commercial has been undertaken and suitable consensus, moderation and due diligence (as appropriate and stated) has been undertaken and has occurred to ratify this position, then results in a tied place where more than one Bidder has attained a total score that is equal to another Bidder under this procurement procedures due process, then the Contracting Authority shall make an award decision on the basis of the Bidder who provided a bid that attained the highest score under Non Commercial criteria, as this aligns to the PA2023 and its associated regulations that are applicable to this procurement, in order to achieve the Most Advantageous Tender award decision.

For example:

Bidder A scores 12.50 for Commercial and 45.00 for Non-commercial

Bidder B scores 15.10 for Commercial and 42.40 for Non-commercial

The result is a tied place at score of 57.50 for both Bidders A&B

The Contracting Authority therefore will make an award decision based upon the Bidder who score the highest on under Non-Commercial criteria in a tied place, as per the example above being that the contract award, is made in the favour of Bidder A who is awarded the Contract(s).

This evaluation criteria will therefore not be subject to any averaging.

## Commercially Sensitive Bidder Content – Assessment Summaries

### Commercial information provided as part of the bidding process

Notwithstanding the Contracting Authorities obligations to comply with the Freedom of Information Act (FOI) and the request for a confirmation of the same as part of your bid submission, contained within this procurement. The Contracting Authority is regulatorily obliged when issuing assessment summaries to issue a copy of the winning Bidders assessment summary to the unsuccessful Bidder(s), along with their own assessment summary as part of due process. Bidders should therefore ensure that they duly highlight this in the FOI exemption form, any and all areas of its bid that any Bidder deems to be commercially sensitive. Bidders shall clearly articulate what is sensitive and provide a commentary and justification for this not to be released, such as grounds that could or would prejudice the legitimate commercial interest of an individual Bidder e.g. a trade secret or unique selling points that would prejudice the Bidders unique system or delivery approach that may contain copyright and or prejudice fair competition between Bidders e.g. future mini competitions under a framework or similar procurement opportunities in the future.

Bidders should note that any claim for blanket confidentiality is naturally discouraged and cannot be accepted by the Contracting Authority, any uncertainties in regard to this area must be formally clarified during the clarification period.

### Bidders are to note

For absolute clarity if no areas of the bid are highlighted or justified as commercially sensitive as required above, then this will be accepted and understood by the Contracting Authority that the Bidder does not have any commercially sensitive information in its bid and authorises the Contracting Authority to incorporate this information, as relevant to any assessment summary feedback obligations that have to be discharged as part of due process.

## 5.5. Evaluation process

5.5.1. 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"> <li>RFP logged upon opening in alignment with UKSBS's procurement procedures in the eSourcing Portal.</li> <li>Any RFP Bid received after the closing date will be rejected unless circumstances attributed to UKSBS, the Contracting Authority or the eSourcing Portal beyond the Bidders control are responsible for late submission.</li> </ul>
Compliance check	<ul style="list-style-type: none"> <li>Check debarment question and debarment list for all Bidders, Subcontractors, PSC.</li> <li>Check all Mandatory / Discretionary grounds and other such requirements are acceptable to the Contracting Authority.</li> <li>Check compliance with the Conditions of participation both via unique identifier number on the CDP and in the Bidders submission.</li> <li>Bids maybe subject to clarification by the Contracting Authority or subject to exclusion and rejection of the Bid, dependent upon the</li> </ul>

	<p>extent or severity of the noncompliance identified and, on a case,-by-case basis so as to maintain the proper conduct and impartiality of the procurement.</p>
Conflicts of Interests	<ul style="list-style-type: none"> <li>The Evaluation team members will have Col re visited by UKSBS prior to being given access to the bids received in the eSourcing Portal.</li> </ul>
Scoring of the Bid	<ul style="list-style-type: none"> <li>The Evaluation team members will each independently score the Bid(s) and will provide a thorough commentary, of their scoring justification against the specific criteria.</li> </ul>
Clarifications	<ul style="list-style-type: none"> <li>The Evaluation team may possibly require written clarifications to be issued to Bidders submissions, in order to ensure the proper conduct of the evaluation.</li> </ul>
Re - scoring of the Bid and Clarifications	<ul style="list-style-type: none"> <li>Following Clarification responses, the Evaluation team reserve the right to independently re-score the Bid based upon the formal clarifications and provide a commentary of their re-scoring justification against the Conditions of Participation questionnaire and Award criteria.</li> </ul>
Consensus meeting	<ul style="list-style-type: none"> <li>To conduct a consensus meeting to agree the Non-Commercial evaluation scores.</li> <li>To ensure that equal treatment of all bids has been done with impartiality.</li> <li>To confirm contents of the Assessment Summaries to provide details of scoring and feedback on the unsuccessful Bidders response in comparison with the successful Bidders Assessment Summary suitably redacted, whilst confirming the winning bidders Assessment Summary content</li> </ul>
Moderation meeting (if required to reach an award decision)	<ul style="list-style-type: none"> <li>To review the scoring outcomes of the Commercial / Non-commercial evaluation.</li> <li>To agree final scoring for each Bid, relative rankings of the Bids</li> <li>To ensure that equal treatment of all bids has been done with impartiality.</li> <li>To confirm contents of the Assessment Summaries to provide details of scoring and feedback on the unsuccessful Bidders response in comparison with the successful Bidders Assessment Summary suitably redacted, whilst confirming the winning bidders Assessment Summary content</li> </ul>
Due diligence of the Bid	<ul style="list-style-type: none"> <li>The Contracting Authority may (as applicable) request the following from Bidders once initial and perceived award decisions have been made. <ul style="list-style-type: none"> <li>Confirmation by the Bidder via an insurance provider that cover documents can be in place at the time of contract signature by the Bidder</li> <li>Request for bone fide email / physical evidence of documents / accreditations referenced in the Request for Proposal response Bid and or Clarifications from the Bidder</li> <li>Taking up of Bidder references from the Bidders previous contracted parties</li> <li>Confirmation that the Col statement made remains valid.</li> <li>Confirmation that the Debarment / PSC statement remains valid.</li> <li>Financial Credit check for the Bidder (usually undertaken by UKSBS)</li> </ul> </li> </ul>

Validation of unsuccessful Bidders	<ul style="list-style-type: none"> <li>To undertake a feedback validation of the Bidder Assessment Summaries for the unsuccessful Bidders bid and the successful Bidders Assessment Summary content to be provided.</li> </ul>
Issuing of Bidder Assessment Summaries	<ul style="list-style-type: none"> <li>The issue of the Supplier / Unsuccessful Bidder Assessment Summaries, so as to advise all bidders of the outcome of the procurement and to start the regulatory standstill period. The Contracting Authority will also be publishing a Contract Award Notice on the CDP.</li> </ul>

## Section 6 – Evaluation Response Questionnaires

**PLEASE NOTE THE QUESTIONS MAY NOT BE NUMBERED SEQUENTIALLY**

### **6.1. Technical and Commercial Questionnaire**

6.2.1 Bidders should note that the procurement specific Technical and Commercial Questionnaire is located within the **eSourcing Portal**.

**Guidance on how to register and use the eSourcing Portal is available at**

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

## Section 7 – General information

### 7.1. Introduction

- 7.1.1. The Contracting Authority wishes to establish a Contract(s) for the provision of Advanced CI Training and Certification. The Contracting Authority is managing this procurement process in accordance with the Procurement Act 2023 and the Procurement Regulations 2024 applicable to this procurement procedure (as may be amended from time to time) (the “Regulations”). This is a Services Contract being procured under the Open Procedure.
- 7.1.2. The Contracting Authority is procuring the Contract for its exclusive use.
- 7.1.3. UKSBS and the Contracting Authority logo, trademarks and other identifying marks are proprietary and may not be incorporated in the Companies response without the Contracting Authority’s written permission.
- 7.1.4. The Bidder shall indemnify and keep indemnified UKSBS and the Contracting Authority against all actions, claims, demands, proceedings, damages, costs, losses, charges, and expenses whatsoever in respect of any breach by the Bidder(s) of this document.
- 7.1.5. If there is any doubt with regard to any perceived ambiguity of any question or content contained in this questionnaire / procurement documentation, in regard to what is being requested, then PLEASE ASK a formal clarification question, but please ensure that your question is via the formal clarification process in writing to the UKSBS representative nominated. No approach of any kind in connection with this opportunity should be made to any other person within or associated with UKSBS or the Contracting Authority. All information secured outside of this named contact shall have no legal standing or worth and should not be relied upon when preparing or submitting any bid(s).
- 7.1.6. It remains the responsibility of all Bidders to keep UKSBS and the Contracting Authority suitably and promptly informed of any matter that may affect continued consideration and evaluation of your bid submission(s) during the evaluation stage up to the contract award signing stage e.g. any Debarment ground status, mandatory or discretionary grounds including any proposed partners, PSC, subcontractors(as applicable) or changes that may impact the proper conduct of the Contracting Authorities evaluation of all bids(s) received.
- 7.1.7. Prior to commencing formal evaluation, Submitted Responses will be checked to ensure that Bidders at that time are not on the Governments debarment list, this includes e.g. PSC etc. within the parameters of the bid submission. This will then lead onto the bids full compliance with the Pass / Fail criteria within the Evaluation model. Non-compliant Submitted Responses may be excluded for consideration of award dependent upon the factors that are established by the Contracting Authority. Submitted Responses which are deemed by the Contracting Authority to be fully compliant will proceed to evaluation. These will be evaluated using the criteria and scores detailed in the matrix set out in [Section 5](#).
- 7.1.8. Whilst it is the Contracting Authority’s intention to purchase the majority of its Services under this Contract Arrangement from the Supplier(s) appointed this does not confer any exclusivity on the appointed Suppliers. The Contracting Authority

reserve the right to purchase any Services (including those similar to the Services covered by this procurement) from any Supplier outside of this Contract.

- 7.1.9. The Contracting Authority reserves the right not to conclude a Contract as a result of the current procurement process. Bidders should review the contents of Section 7 paragraph 7.8.1 when considering submitting their Response.
- 7.1.10. The Services covered by this procurement exercise have NOT been sub-divided into Lots.
- 7.1.11. The Contracting Authority shall utilise the eSourcing Portal available at <https://beisgroup.ukp.app.jaggaer.com/> to conduct this procurement. There will be no electronic auction following the conclusion of the evaluation of the Request for Proposal (RFP) responses. Bidders will be specifically advised where attachments are permissible to support a question response within the eSourcing Portal.

All enquiries with respect to access to the eSourcing Portal and problems with functionality within the portal must be submitted to eSourcing Portal Helpdesk

**Phone** 08000 698 632

**Email** [customersupport@jaggaer.com](mailto:customersupport@jaggaer.com)

Please note: the eSourcing Portal is a free self-registration portal. Bidders can complete the online registration at the following link:

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

- 7.1.12. Please utilise the messaging system within the eSourcing Portal located at <https://beisgroup.ukp.app.jaggaer.com/> within the timescales detailed in [Section 3](#). If you have any doubt as to what is required or will have difficulty in providing the information requested. Bidders should note that any requests for clarifications may not be considered by the Contracting Authority if they are not articulated by the Bidder within the discussion forum within the eSourcing Portal.
- 7.1.13. Bidders should that they read this document, and all attachment, messages and the response envelopes located within the eSourcing Portal carefully before completing the Response submission. Failure to comply with any of these instructions for completion and submission of the Submitted Response may result in the rejection and exclusion of the bid Response. Bidders are advised therefore to acquaint themselves fully with the extent and nature of the Services and contractual obligations. These instructions constitute the Conditions of Participation and Conditions of Response. Participation in the RFP process automatically signals that the Bidder accepts these Conditions as part of the bidding process.
- 7.1.14. All material issued in connection with this RFP shall remain the property of the Contracting Authority and shall be used only for the purpose of this procurement. All Due Diligence Information shall be either returned to the Contracting Authority or securely destroyed by the Bidder (at the Contracting Authority's option) at the conclusion of the procurement.
- 7.1.15. The Bidder shall ensure that each and every sub-contractor, consortium member and adviser abide by the terms of these instructions and the Conditions of Participation and Conditions of Response.

- 7.1.16. The Bidder shall not make contact with any other employee, agent or consultant of UKSBS or the Contracting Authority or Customer who are in any way connected with this procurement during the period of this procurement, unless formally instructed otherwise by the Contracting Authority.
- 7.1.17. The Contracting Authority shall not be committed to any course of action as a result of:
- 7.1.17.1. issuing this RFP or any invitation to participate in this procurement.
  - 7.1.17.2. an invitation to submit any Response in respect of this procurement.
  - 7.1.17.3. communicating with a Bidder or a Bidder's representatives or agents in respect of this procurement; or
  - 7.1.17.4. any other communication between UKSBS or the Contracting Authority (whether directly or by its agents or representatives) and any other party.
- 7.1.18. Bidders shall accept and acknowledge that by issuing this RFP the Contracting Authority shall not be bound to accept any Response and reserves the right not to conclude a Contract for some or all the Services for which Responses are invited.
- 7.1.19. The Contracting Authority reserves the right to amend, add to or withdraw all or any part of this RFP at any time during the procurement. The Contracting Authority will suitably discharge its notices obligations in regard to any changes or Termination.
- 7.1.20. Bidders should not include in the Response any extraneous information which has not been specifically requested in the RFP including, for example, any sales literature, standard terms of trading etc. Any such information not requested but provided by the Bidder shall not be considered by the Contracting Authority, as part of its evaluation or scores apportioned.
- 7.1.21. If the Bidder is a consortium, the following information must be provided: full details of the consortium; and the information sought in this RFP in respect of each of the consortium's constituent members as part of a single composite response. Potential Providers should provide details of the actual or proposed percentage shareholding of the constituent members within the consortium as indicated in the relevant section of the Conditions of Participation questionnaire SEL1.9 specifically refers. If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided as indicated in the relevant section of the RFP. However, please note the Contracting Authority reserves the right to require a successful consortium to form a single legal entity in accordance with the Regulations applicable to this procurement opportunity. The Contracting Authority recognises that arrangements in relation to consortia may (within limits) be subject to future change. Potential Providers should therefore respond in the light of the arrangements as currently envisaged. Potential Providers are reminded that any future proposed change in relation to consortia must be notified to the Contracting Authority so that it can make a further assessment by applying the Conditions of Participation questionnaire criteria to the new information provided and consider rejection of the Response if the Contracting Authority reasonably consider the change to have a material impact of the delivery of the viability of the Response.

## **7.2. Bidder conference**

- 7.2.1. A Bidders' Conference will not be held in conjunction with this procurement.

## **7.3. Confidentiality**

- 7.3.1. Subject to the exceptions referred to in paragraph 7.3.2, the contents of this RFP are being made available by the Contracting Authority on condition that:
- 7.3.1.1. Bidders shall at all times treat the contents of the RFP and any related documents (together called the 'Information') as confidential, save in so far as they are already in the public domain.
  - 7.3.1.2. Bidders shall not disclose, copy, reproduce, distribute, or pass any of the Information to any other person at any time or allow any of these things to happen.
  - 7.3.1.3. Bidders shall not use any of the Information for any purpose other than for the purposes of submitting (or deciding whether to submit) a Response; and
  - 7.3.1.4. Bidders shall not undertake any publicity activity within any section of the media in relation to this procurement
- 7.3.2. Bidders may disclose, distribute, or pass any of the Information to the Bidder's advisers, sub-contractors or to another person provided that either:
- 7.3.2.1. This is done for the sole purpose of enabling a Response to be submitted and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were the Bidder; or
  - 7.3.2.2. The disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement or to any Contract arising from it; or
  - 7.3.2.3. The Bidder is legally required to make such a disclosure
  - 7.3.2.4. Any such disclosure if the procedure is run under the requirement of a Non-Disclosure Agreement or Contract, shall not be undertaken until such time as the recipient has signed and agreed to this same obligation and terms.
- 7.3.3. In paragraphs 7.3.1 and 7.3.2 above the term 'person' includes but is not limited to any person, firm, body, or association, corporate or incorporate.
- 7.3.4. UKSBS and the Contracting Authority may disclose detailed information relating to Responses to its employees, agents or advisers and they may make any of the Contract documents available for private inspection by its officers, employees, agents, or advisers. UKSBS and the Contracting Authority also reserve the right to disseminate information that is materially relevant to the procurement to all Bidders, even if the information has only been requested by one Bidder, subject to the duty to protect each Bidder's commercial confidentiality in relation to its Response (unless there is a requirement for disclosure as explained in paragraphs 7.4.1 to 7.4.3 below).
- 7.3.5. 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. Subject

to section 7.4 below, the information will not be disclosed outside Government. Bidders taking part in this RFP consent to these terms as part of the competition process.

- 7.3.6. The Government revised its Government Security Classifications (GSC) classification scheme on the 2<sup>nd</sup> of 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 procurement will be subject to the new GSC from 2nd April 2014. The link below to the Gov.uk website provides information on the new GSC:

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

- 7.3.7. The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this RFP to reflect any changes introduced by the GSC. In particular where this RFP 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**

- [Find high value contracts in the public sector - GOV.UK](#)
- [Equalities Act introduction](#)
- [Bribery Act introduction](#)
- [Freedom of information Act](#)

#### **7.4. Freedom of information**

- 7.4.1. 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), UKSBS and the Contracting Authority may be required to disclose information submitted by the Bidder to the to the Contracting Authority.
- 7.4.2. In respect of any information submitted by a Bidder that it considers to be commercially sensitive the Bidder shall complete the Freedom of Information declaration question defined in the Question FOI1.2 and identify such material and the justification of the sensitivity. This information is required to allow the Contracting Authority to complete and issue assessment summaries once an award decision(s) have been made, see also additional information and guidance in this documentation in regard to commercially sensitive information.
- 7.4.3. 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.

- 7.4.4. Where a Bidder receives a request for information under the FoIA or the EIR during the procurement, this should be immediately passed on to the Contracting Authority and the Bidder should not attempt to answer the request without first consulting with the Contracting Authority.
- 7.4.5. Bidders are reminded that the Government's transparency agenda requires that sourcing documents, including RFP templates such as this, are published on a designated, publicly searchable CDP via the internet and, that the same applies to other sourcing documents issued by the Contracting Authority, and any contract entered into by the Contracting Authority with its preferred Supplier(s) once the procurement is complete (as applicable by the regulations). By submitting a response to this RFP Bidders are agreeing that their participation and contents of their Response may be made public, with due consideration by the Contracting Authority to commercially sensitive information declarations made under the template provided.

## **7.5. Response Validity**

- 7.5.1. Your Response should remain open for consideration for a minimum period of 90 days. A Response valid for a shorter period will be rejected.

## **7.6. Timescales**

- 7.6.1. [Section 3](#) of the RFP 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.

## **7.7. The Contracting Authority's Contact Details**

- 7.7.1. Unless stated otherwise in these Instructions or in writing from UKSBS 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 Portal to the designated UKSBS contact.
- 7.7.2. Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Bid Response outside of the eSourcing Portal, unless the eSourcing Portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all Bidders as to how to submit your Response. Failure to follow this requirement will result in Exclusion of the Bid Response and further consideration for the procurement opportunity.

## **7.8. Preparation of a Response**

- 7.8.1. Bidders must obtain for themselves at their own responsibility and expense all information necessary for the preparation of Responses. Bidders are solely responsible for all costs, expenses and other liabilities arising in connection with the

preparation and submission of their Response and all other stages of the Conditions of Participation questionnaire and Conditions of Response to allow the Contracting Authority to undertake the evaluation process. Under no circumstances will UKSBS or the Contracting Authority, or any of their advisers, be liable for any such costs, expenses or liabilities borne by Bidders or their sub-contractors, supply chain or third parties in this preparation or process.

- 7.8.2. Bidders are required to complete and provide all information required by the Contracting Authority in accordance with the Conditions of Participation and Conditions of Response and the RFP. Failure to comply with the Conditions and the RFP may lead the Contracting Authority to exclude a bidders Response.
- 7.8.3. The Contracting Authority relies on Bidders' own analysis and review of information provided. Consequently, Bidders are solely responsible for obtaining the information which they consider is necessary in order to make decisions regarding the content of their Responses and to undertake any investigations they consider necessary in order to verify any information provided to them during the procurement.
- 7.8.4. Bidders must form their own opinions, making such investigations and taking such advice (including professional advice) as is appropriate, regarding their Responses, without reliance upon any opinion or other information provided by the Contracting Authority or their advisers and representatives. Bidders should notify the Contracting Authority promptly of any perceived ambiguity, inconsistency, or omission in this RFP, any of its associated documents and/or any other information issued to them during the procurement via a formal clarification.
- 7.8.5. Bidders must ensure that each response to a question is within any specified page limit. Any responses with pages in excess of the page limit will only be consider up to the point where they meet the page limit, any additional pages beyond the volume defined in the page limit will not be considered by the evaluation panel as part of the evaluation and scoring process.
- 7.8.6. Bidders must ensure that each response to a question is not cross referenced to a response to another question. In the event of a Bidder adding a cross reference it will not be considered in evaluation process.

## **7.9. Submission of Responses**

- 7.9.1. The Response must be submitted as instructed in this document through the e-sourcing tool. Failure to follow the instruction within each Section of this document, to omit responses to any of the questions or to present your response in alignment with any guidance notes provided may render the Response non-compliant and it may be rejected.
- 7.9.2. The Contracting Authority may at its own absolute discretion extend the closing date and the time for receipt of Responses specified [Section 3](#).
- 7.9.3. Any extension to the RFP response period will apply to all Bidders and will be covered in a published notice.
- 7.9.4. Any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Failure to adhere to this requirement will result in the Response being rejected and not being considered further in the evaluation process.

- 7.9.5. The Contracting Authority do not accept responsibility for the premature opening or mishandling of Responses that are not submitted in accordance with the instructions of this document.
- 7.9.6. The Response and any documents accompanying it must be in the English language
- 7.9.7. Bidders must submit their response through the e-sourcing tool, unless explicitly requested by the Contracting Authority either in the procurement documents or via a formal clarification from the Contracting Authority. Responses received by any other method than requested will not be considered for the opportunity.
- 7.9.8. Responses will be submitted any time up to the date indicated in [Section 3](#). Responses received before this deadline will be retained in a secure environment, unopened until this deadline has passed.
- 7.9.9. Responses received after the date indicated in [Section 3](#) 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
- 7.9.9.1. The Bidder must demonstrate irrefutable evidence in writing they have made best endeavours to ensure the Response was received on time and that the issue was beyond their control.
  - 7.9.9.2. Any request for a late Response to be considered must be emailed to the Buyer in [Section 3](#) in advance of 'the deadline' if a Bidder believes their Response will be received late.
  - 7.9.9.3. The Contracting Authority reserves the right to accept or exclude any late Response without justification to the affected Bidder and make no guarantee it will consider any request for a late Response to be considered.
- 7.9.10. Do not seek changes to the Bid after responses have been submitted and the deadline (date and time) for receipt of responses has passed.

## 7.10. Canvassing

- 7.10.1. Any Bidder who directly or indirectly canvasses any employee, or agent of UKSBS, the Contracting Authority, or its members or any of its employees concerning the establishment of the Contract or who directly or indirectly obtains or attempts to obtain information from any such officer, member, employee, or agent or concerning any other Bidder, Response or proposed Response will be disqualified.

## 7.11. Disclaimers

- 7.11.1. Whilst the information in this RFP, Due Diligence Information and supporting documents has been prepared in good faith, it does not purport to be comprehensive, nor has it been independently verified.
- 7.11.2. Neither UKSBS, the Contracting Authority, nor their advisors, nor their respective directors, officers, members, partners, employees, other staff or agents:
- 7.11.2.1. makes any representation or warranty (express or implied) as to the accuracy, reasonableness, or completeness of the RFP; or
  - 7.11.2.2. accepts any responsibility for the information contained in the RFP or for their fairness, accuracy or completeness of that information nor shall any of them be liable for any loss or damage (other than in

respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.

- 7.11.3. Any persons considering making a decision to enter into contractual relationships with the Contracting Authority following receipt of the RFP should make their own investigations and their own independent assessment of the Contracting Authority and its requirements for the Services and should seek their own professional financial and legal advice. For the avoidance of doubt the provision of clarification or further information in relation to the RFP or any other associated documents (including the Schedules) is only authorised to be provided following a query made in accordance with Paragraph 7.15 of this RFP.

## **7.12. Collusive behaviour**

### **7.12.1. Any Bidder who:**

- 7.12.1.1. fixes or adjusts the amount of its Response by or in accordance with any agreement or arrangement with any other party; or
- 7.12.1.2. communicates to any party other than UKSBS, or the Contracting Authority the amount or approximate amount of its proposed Response or information which would enable the amount or approximate amount to be calculated (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the Response or insurance or any necessary security); or
- 7.12.1.3. enters into any agreement or arrangement with any other party that such other party shall refrain from submitting a Response; or
- 7.12.1.4. enters into any agreement or arrangement with any other party as to the amount of any Response submitted; or
- 7.12.1.5. offers or agrees to pay or give or does pay or give any sum or sums of money, inducement or valuable consideration directly or indirectly to any party for doing or having done or causing or having caused to be done in relation to any other Response or proposed Response, any act or omission,

shall (without prejudice to any other civil remedies available to the Contracting Authority and without prejudice to any criminal liability which such conduct by a Bidder may attract) be disqualified and not considered further for this opportunity.

## **7.13. No inducement or incentive**

- 7.13.1. The RFP is issued on the basis that nothing contained in it shall constitute an inducement or incentive nor shall have in any other way persuaded a Bidder to submit a Response or enter into the Contract or any other contractual agreement.

## **7.14. Acceptance of the Contract**

- 7.14.1. The Bidder in submitting the Response undertakes that in the event of the Response being accepted by the Contracting Authority and the Contracting Authority confirming in writing such acceptance to the Bidder, the Bidder will within 2 days of being called upon to do so by the Contracting Authority execute the Contract in the form set out in the Contract Terms or in such amended form as may subsequently be agreed.
- 7.14.2. The Contracting Authority shall be under no obligation to accept the lowest priced or any Response.

## **7.15. Queries relating to the Response**

- 7.15.1. All requests for clarification about the requirements or the process of this procurement shall be made in through the eSourcing Portal unless the eSourcing Portal is unavailable due to system maintenance or failure, in this instance all clarifications shall be by email to the contact defined in [Section 3](#).
- 7.15.2. The Contracting Authority will endeavour to answer all questions as quickly as possible but cannot guarantee a minimum response time.
- 7.15.3. In the event of a Bidder requiring assistance uploading a clarification to the eSourcing Portal they should use the contact details defined in [Section 3](#).
- 7.15.4. No further requests for clarifications will be accepted after 7 days prior to the date for submission of Responses.
- 7.15.5. In order to ensure equality of treatment of Bidders, the Contracting Authority intends to publish the questions and clarifications raised by Bidders together with the Contracting Authority's responses (but not the source of the questions) to all participants on a regular basis.
- 7.15.6. Bidders should indicate if a query is of a commercially sensitive nature – where disclosure of such query and the answer would or would be likely to prejudice its commercial interests. However, if the Contracting Authority at its sole discretion does not either; consider the query to be of a commercially confidential nature or one which all Bidders would potentially benefit from seeing both the query and the Contracting Authority's response, the Contracting Authority will:
- 7.15.6.1. invite the Bidder submitting the query to either declassify the query and allow the query along with the Contracting Authority's response to be circulated to all Bidders; or
  - 7.15.6.2. request the Bidder, if it still considers the query to be of a commercially confidential nature, to withdraw the query prior to the end of the closing date and time for Bidder clarifications.
- 7.15.7. The Contracting Authority reserves the right not to respond to a request for clarification or to circulate such a request where it considers that the answer to that request would or would be likely to prejudice a Bidders commercial interest.

## **7.16. Amendments to Response Documents**

- 7.16.1. At any time prior to the deadline for the receipt of Responses, the Contracting Authority may modify the RFP by amendment. Any such amendment will be numbered and dated and issued by the Contracting Authority to all prospective Bidders. In order to give prospective Bidders reasonable time in which to take the amendment into account in preparing their Responses, the Contracting Authority may, at its discretion, extend the time and/or date for receipt of Responses and will duly update notices.

## **7.17. Modification and withdrawal**

- 7.17.1. Bidders may modify their Response where allowable within the eSourcing Portal. No Response may be modified after the deadline for submission of Responses.

7.17.2. Bidders may withdraw their Response at any time prior the deadline for submission of Responses. The notice to withdraw the Response must be in writing and communicated to the procurement lead or team as identified by contact details within this document.

#### **7.18. Right to exclude (notwithstanding as referred elsewhere in the RFP)**

- 7.18.1. The Contracting Authority reserves the right to exclude a Bidder were
- 7.18.1.1. the Bidder fails to comply fully with the requirements of this RFP or procurement and presents the response in a format contrary to the requirements of this document; and/or
  - 7.18.1.2. the Bidder is guilty of serious misrepresentation in relation to its Response; expression of interest; or the Response process; and/or
  - 7.18.1.3. there is a change in identity, control, financial standing or other factor impacting on the Conditions of Participation questionnaire and/or Award stage / evaluation process affecting the Bidder.

#### **7.19. Right to cancel, clarify or vary the process**

- 7.19.1. The Contracting Authority reserves the right to:
- 7.19.1.1. cancel the evaluation process at any stage; and/or
  - 7.19.1.2. may require the Bidder to clarify its Response in writing and/or provide additional information. Failure to respond adequately may result in the Bidder being excluded for any award.

#### **7.20. Notification of award**

- 7.20.1. The Contracting Authority will notify the successful Bidder(s) of the Contract award formally and will publish a Contract Award Notice on the CDP and other such notices in accordance with the Regulations associated with this procurement.
- 7.20.2. As required by the Regulations associated with this procurement all successful and unsuccessful Bidders will be notified of the award decision(s) made and provided with Bidder assessment summaries, as applicable to the outcome of this procurement with regards to your bid(s) response.

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

#### **DO:**

- 8.1. Do read thoroughly and ensure comply with the procurement document instructions and outcomes sought when participating in this procurement opportunity. Any failure to do so may lead to your bid being deemed as non-compliant and or being rejected.
- 8.2. Do provide the Bid on time, complete and in the required format. Remember that the date/time given for a bid response is the last date that it can be accepted; we are regulatorily bound to Exclude late submissions. Responses received after the date indicated in the RFP 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 or due to an outage in the eSourcing Portal, an alternative way to submit bids has been formally advised by the Contracting Authority.

- 8.3. Do ensure you have read all the training materials to utilise eSourcing Portal prior to responding to this Bid. If you send your Bid by email or post unless instructed formally to do so by the Contracting Authority, then it will be rejected.
- 8.4. 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 exclude your Bid.
- 8.5. Do ensure you utilise the eSourcing Portal messaging system to raise any clarifications to the RFP. 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. Ensure that you raise all clarifications before the closing date and time for receipt of clarifications, as we will be unable to respond after this time date and time.
- 8.6. Do ensure you utilise and engage the eSourcing Portal helpline and assistance, if you are unsure or are having difficulties utilising the eSourcing Portal for registration and to be able to submit a bid. Do not contact the Buyer in regard to how to utilise the system, the eSourcing Portal provider has dedicated experts and is responsible for assisting all Bidders to use the system effectively, in its performance and service provision of the eSourcing Portal.
- 8.7. Do ensure that you allow a sufficiency of time to register on the CDP and Contracting Authorities eSourcing Portal and allow a sufficiency of time to answer all the questions, don't leave this till the last moment and miss the date and time to submit, as the Contracting Authority wishes to generate as much competition that benefits the public purse.
- 8.8. Do answer the questions fully, it is not enough simply to cross-reference to a 'policy', web page or another part of your Bid (unless the question specifically requests and allows you to do so) the evaluation team have timeline to assess all bids and if they can't find the answer, they are unable to score it.
- 8.9. Do seriously consider who the Contracting Authority is and what they want as an outcome of the procurement, a generic answer does not necessarily meet every Contracting Authority's needs. If you are in any doubt or unsure about any aspect of the procurement, then please ensure that you utilise the assistive clarification process provided.
- 8.10. Do reference your documents correctly, specifically where supporting documentation is requested e.g. referencing the specific question(s) they apply to.
- 8.11. Do provide clear, concise, and ideally generic contact details; telephone numbers, e-mails and as applicable details, so as this provides a contingency for bidding during holidays and potential staff absence e.g. sickness.
- 8.12. Do complete all questions in the Conditions of Participation questionnaire both via the registration steps on the CDP, as well as any RFP procurement specific questions and uploaded document requirement questions under this procurement or this may result in the rejection of your Bid.

- 8.13. Do ensure that the Response and any documents accompanying it, are in the English Language, the Contracting Authority reserve the right to Exclude any full or part responses that are not in English.
- 8.14. Do check and recheck your Bid before uploading this to the eSourcing Portal and ensure that your bid has been uploaded complete and correctly.
- 8.15. Do ensure that you advise in your bid submission if you are either (i) under investigation in regard to Debarment (ii) appealing a decision of Debarment.
- 8.16. Do keep the Contracting Authority aware in any changes that may have an impact upon your bid submission (including other parties associated and relied upon within your bid e.g. sub-contractors proposed) and the proper conduct of the procurement, such as but not limited to Debarment status / PSC/ Financial and Technical matters.
- 8.17. Do make sure that your organisation is registered on the CDP so as you are able to provide your bid and any other unique identifier number if this is relevant to your submission.

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

### DO NOT

- 8.18. Do not just cut and paste from a previous document and forget to change the previous details relevant to this procurement or leave in such things as the previous Contracting Authorities name.
- 8.19. 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.
- 8.20. Do not share the Procurement documents, they may be confidential or potentially sensitive in nature to the Contracting Authority and should not be shared with anyone without the Buyers written permission, especially if a non-disclosure contract condition is incorporated and imposed within the procedure.
- 8.21. Do not seek to influence the procurement process by requesting meetings or contacting UKSBS or the Contracting Authority to discuss your Bid. If your Bid requires clarification the Buyer will contact you. All information secured outside of the formal Buyer communications via the eSourcing Portal shall have no Legal standing or worth and should not be relied upon when submitting your bid submission.
- 8.22. Do not contact any UKSBS, Contracting Authority or third party staff associated with the procurement without the Buyers written permission or we may exclude your Bid.
- 8.23. Do not collude to fix or adjust the price or withdraw your Bid with another Party as we will exclude your Bid.
- 8.24. Do not offer UKSBS or the Contracting Authority staff any inducement or we will exclude your Bid.
- 8.25. Do not provide if requested to do so or seek to provide changes to the Bid after responses have been submitted and the deadline for Bids to be submitted has passed, unless requested to do so under a formal clarification by the Contracting Authority via the eSourcing Portal.
- 8.26. Do not cross reference answers to external websites (unless the question specifically allows you to do so) or other parts of your Bid, the cross references and website links will not be considered during the evaluation process.
- 8.27. Do not exceed page limits, the additional pages will not be considered during the evaluation process.
- 8.28. Do not make your Bid conditional on acceptance of your own Terms of Contract, as your Bid may be rejected, as defined within the procurement documentation.
- 8.29. 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 bid response by any way other than via the eSourcing Portal. Responses received by any other method than requested, will not be considered as received compliantly and will be rejected.

- 8.30. Do ensure that your organisation or any other party that you are intending to submit a joint or sub contractual basis / bid submission with, is not on the Governments Debarment list, nor contains a PSC that will not be acceptable to the Contracting Authority.
- 8.31. Do not bid on the basis of not providing all the information that has been requested by the Contracting Authority by the closing date and time. If you are unsure or require clarity, please use the formal clarification option available to all Bidders.

## Some additional Bidder guidance

- 9.1. All enquiries with respect to access to the eSourcing portal and problems with functionality within the portal must be submitted to eSourcing Helpdesk

**Phone** 08000 698 632

**Email** [customersupport@jaggaer.com](mailto:customersupport@jaggaer.com)

- 9.2. Please note: the eSourcing Portal is a free self-registration portal. Bidders can complete the online registration at the following link:

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

- 9.3. All enquiries with respect to access to the CDP and problems with functionality within the portal must be submitted to Digital Platform Team / Helpdesk not the Contracting Authority to resolve.

Please note: the CDP is a free self-registration portal. Bidders can complete the online registration at the following link:

[Find high value contracts in the public sector - GOV.UK](#)  
(Governments Central Digital Platform)

- 9.4. 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.
- 9.5. Question numbering is not always sequential and all questions which require submission are included in the procurement documents in excess of the CDP.
- 9.6. Any Contract offered may not guarantee any volume of work or any exclusivity of supply.
- 9.7. We do not guarantee to award any Contract as a result of this procurement
- 9.8. All documents issued or received in relation to this procurement shall be the property of the Contracting Authority / UKSBS.
- 9.9. We can amend any part of the procurement documents at any time prior to the latest date / time Bids shall be submitted through the eSourcing Portal.
- 9.10. If you are a SPV, Consortium, Partnership you must provide details of the organisational structure and complete details, as required within the CDP.
- 9.11. Bidders will be expected to comply with the Freedom of Information Act 2000, or your Bid will be rejected.
- 9.12. Bidders should note the Government's transparency agenda requires your information and any Contract (as applicable) entered into to be published on a designated, publicly searchable web site. By submitting a response to this RFP Bidders are agreeing that their Bid and any Contract may be made public

- 9.13. Your bid will be valid for [modify duration if not 90~~0~~] days or your Bid will be rejected.
- 9.14. 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 exclude your Bid.
- 9.15. 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.
- 9.16. If you fail mandatory pass / fail criteria this may result in the exclusion of your bid dependent upon the specific question and or circumstances.
- 9.17. Bidders are required to use IE8, IE9, Chrome or Firefox in order to access the functionality of the eSourcing Portal.
- 9.18. 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.
- 9.19. 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 eSourcing Portal.
- 9.20. 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.
- 9.21. 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 RFP consent to these terms as part of the competition process.
- 9.22. The Government revised its Government Security Classifications (GSC) classification scheme on the 5th of August 2024 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>

- 9.23. The Contracting Authority reserves the right to amend any security related term or condition of the draft contract accompanying this RFP to reflect any changes introduced by the GSC. In particular where this RFP 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.
- 9.24. USEFUL INFORMATION LINKS  
[Equalities Act introduction](#)  
[Bribery Act introduction](#)  
[Freedom of information Act](#)
- 9.25. Unless stated otherwise in these Instructions or in writing from UKSBS 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 UKSBS contact.
- 9.26. Bidders should be mindful that the designated Contact or other persons associated with this opportunity, should not under any circumstances be sent a copy of their Response outside of the eSourcing portal, unless the portal cannot receive your response due to an outage, should this happen then Contracting Authority will suitably formally instruct all Bidders as to how to submit your Response. Failure to follow this requirement will result in exclusion of your Bid.

## Appendix A – Glossary of Terms

TERM	MEANING
“Bid”, “Response”, “Submitted Bid”, or “RFP Response”	means the Bidders formal offer in response to this Request for Proposal.
“Bidder(s)”	means the organisation(s) responding to this Request for Proposal.
“Bidders Assessment Summaries”	Means the feedback defined as Supplier Assessment Summaries in the PA 2023
“Buyer”	means the person in UKSBS who is responsible for conducting the procurement for and on behalf of the Contracting Authority.
“Central Purchasing Body”	means a duly constituted public sector organisation which procures Goods and or Services for and on behalf of Contracting Authorities.
“Conditions of Participation or Conditions of Response”	means the new PA 2023 (replacing the old public procurement regime regulations) both on line via the CDP platform for parts 1&2 and part 3 via the eSourcing Portal.  means the requirements set out to be met by Bidders in accordance with the Contracting Authority requests for information, during the Conditions of Participation and the conditions surrounding the application of the evaluation criteria up to contract award stage (as applicable unless otherwise stated) as set out in this RFP relating to the Bidders submission for consideration by the Contracting Authority.
“Central Digital Platform or CDP”	means the Government's new Central Digital Platform for all procurements (as applicable) competed under the new PA 2023 that all Bidders must successfully register on as applicable to each procurement dependant upon the organisational structure.
“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 CDP. Procurement documents and Notice
“Contracting Authority”	means a public body regulated under the Public Procurement Regulations as applicable to this procurement, for and or on whose behalf the procurement is being run by UKSBS.
“Customer”	means the legal entity (or entities) for which any Contract agreed will be made accessible to, in excess of the Contracting Authority.
“Debarment”	means the mechanism under which a Minister of the Crown can put any supplier on the centrally published debarment list. This must be following an investigation, whereby the minister is satisfied that a supplier is an excluded supplier or an excludable supplier and should be added to the debarment list.
“Due Diligence Information”	the Contracting Authority may *request the following requirements at the award decision stage of the Procurement: <ul style="list-style-type: none"> <li>○ Submission of insurance documents from the Bidder</li> </ul>

	<ul style="list-style-type: none"> <li>○ Request for evidence of documents / accreditations referenced in the / Invitation to Quote response / Bid and / or Clarifications from the Bidder</li> <li>○ Taking up of Bidder references from the Bidders Customers.</li> <li>○ Financial Credit check for the Bidder (*carried out by UKSBS not requested from the bidder)</li> </ul>
"EIR"	mean the Environmental Information Regulations 2004 (as amended 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 Regulations.
"eSourcing Portal"	means the online system that all potential Bidders must register on prior to registering an interest in a procurement opportunity and ultimately to provide a bid submission via.
"Excludable supplier"	means a Bidder is an 'excludable supplier' where the contracting authority considers, firstly, that a <b>discretionary exclusion</b> ground applies to the supplier or an associated person and, secondly, that the circumstances giving rise to the exclusion ground are continuing or likely to occur again. A supplier will also be an excludable supplier where a Minister of the Crown has already determined this – i.e. where the supplier or an associated person is on the debarment list because of a discretionary exclusion ground.
"Excluded supplier"	means a Bidder is an 'excluded supplier' where the contracting authority considers, firstly, that a <b>mandatory exclusion</b> ground applies to the supplier or an associated person and, secondly, that the circumstances giving rise to the exclusion ground are continuing or likely to occur again. A supplier will also be an excluded supplier where a Minister of the Crown has already determined this – i.e., where the supplier or an associated person is already on the debarment list because of a mandatory exclusion ground.
"FoIA"	means the Freedom of Information Act 2000 (as amended from time to time) 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.
"Goods / Services "	means any Goods and or Services set out at within <a href="#">Section 4 Specification</a>
"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 UKSBS that will be dealing with the procurement
"Order"	means an order served by any Contracting Body on the Supplier (as applicable).
"PA2023"	means the Procurement Act 2023 and its associated Statutory Instruments that apply to this procedure, e.g. The Procurement Regulations 2024.
"Procurement Documents"	Means the documentation and information that is provided to all Bidders so as to provide a bid(s) against the procurement opportunity.
"PSC"	means Persons of Significant Control associated with your bid submission.

<b>“Reserved rights”</b>	means as if stated within these procurement documents reserved rights of the Contracting Authority to reconfigure the service provision, purchase additional Supplier Goods and or Services.
<b>“Supplier(s)”</b>	means in non UKSBS terms Cabinet Office e.g. a Government PPN or a specific Departments terminology question to an organisation(s) / Bidder who is bidding for this opportunity or a supplier who is not bidding this opportunity but may be subcontracted in remoteness to this opportunity e.g. UK / Treaty suppliers. In UKSBS terms it means in all procurement oppertuntites after an award decision(s) have been reached, the Bidder(s) / organisation(s) who have been awarded the Contract(s) then become a Supplier.
<b>“Tender exercise”</b>	means the activities and implications surrounding the procurement, in the GDPR aspects section of the procurement documents.
<b>“UKSBS”</b>	means UK Shared Business Services Ltd herein after referred to as UKSBS.
<b>“Unique Identifier”</b>	means Unique identifiers defined in regulation 8 of the Procurement Regulations 2024. In the case of a Bidder, it is the unique code which is submitted to the CDP and is recognised by that platform or, where no such code is submitted and recognised, it is the unique code which is allocated by that platform when the Bidder registers on the CDP.