

# Request for Proposal

## Question bank



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

**Subject: UKRI Policy Fellowships Training and Mentoring Programme**

**Sourcing Reference Number: CSP250477**

## Section 6 – Response Evaluation Questionnaires

### Introduction

Bidders should note that the bid response evaluation questionnaire Part 3 is located within the **eSourcing portal**. **Parts 1&2 are per your own submission onto the Governments Digital Platform (CDP) which may require you to provide this in a PDF format to the Contracting Authority if interoperability between the CDP and the E-Sourcing provider is not functional, at the time the procurement is run.**

Guidance on how to register and use the eSourcing portal is available at <https://beisgroup.ukp.app.jaggaer.com/>

**PLEASE NOTE THE QUESTIONS ARE NOT NUMBERED SEQUENTIALLY**

**UKRI Policy Fellowships Training and Mentoring Programme**

**CSP250477**

**OPEN PROCEDURE**

### **Bidder Guidance:**

1. The “authority” or “we” or “us” means the named Contracting Authority or anyone acting for and on behalf of the Contracting Authority, that is seeking to invite suitable organisations to participate in this procurement process.
2. “You” / “Your” refers to the potential Bidder completing this standard Conditions of Participation Questionnaire i.e. the legal entity responsible for the information provided. The term “ Bidder(s) and Supplier(s)” is intended to cover any economic operator as defined by the Procurement Act 2023 and its associated regulations that apply to this procurement (referred to as the “regulations”) and could be a registered company; the lead contact for a group of economic operators; charitable organisation; Voluntary Community and Social Enterprise (VCSE); Special Purpose Vehicle; or other form of entity.
3. Please ensure that all information in relation to the Conditions of Participation Questionnaire are as required contained on the CDP, prior to the bid closing date / time and any specific questions contained herein are completed in full, and in the format requested. If any question does not apply to you, please state ‘N/A’. Should you need to provide additional information in response to the questions in section 3 of this document, please submit a clearly identified annex (as requested/applicable).
4. The authority recognises that arrangements set out in section 1 & 2 on the CDP and potentially section 3 of the Conditions of Participation questionnaire contained herein, in relation to a group of economic operators (for example, a consortium) and/or use of sub-contractors, may potentially be subject to change due to say e.g. a mandatory or discretionary ground or debarment status. The lead contact should notify the authority immediately of any change in the proposed arrangements, as provided in your submission. Any failure to notify the Contracting Authority may be considered, depending upon the individual nature and circumstances of the change by the Contracting Authority, as providing misleading or false information and may lead to your bid submission being excluded from further consideration for any award.
5. It is essential that all Bidders ensure before bidding, that your entire bid proposal (Consortia / Partnership / SPV including subcontractors) does not fail the regulations

test of “Debarment”, “Excluded”, “Excludable”, including Associated Persons and or Persons of Significant Control grounds. Bidders should also refer throughout the procurement documents for additional Bidder assistance and guidance and seek formal clarification via the eSourcing platform if you are at all unsure.

The Contracting Authority may decline to consider bids (or otherwise exclude from participating in the procurement) from suppliers who are constituted or organised under the law of Russia or Belarus, or whose ‘Persons of Significant Control’ information states Russia or Belarus as the place of residency, unless the supplier (or any member of their supply chain they rely on to deliver the contract):

- is registered in the UK or in a country the UK has a relevant international agreement with reciprocal rights of access to public procurement; and/or
- has significant business operations in the UK or in a country the UK has a relevant international agreement with reciprocal rights of access to public procurement.

Bidder guidance: For the mandatory exclusion grounds only, you must complete the declaration for all relevant persons and entities. There are two categories of persons and entities:

- members of your administrative, management or supervisory board;
- entities and persons who have powers of representation, decision or control.

You must decide, depending on the nature and structure of the entity or person who is bidding, which entities and persons this applies to in your particular circumstances. Clearly, members of your administrative, management or supervisory board should be easily identifiable and will cover company directors (or equivalent for other types of corporate entities) and members of an executive board.

The second category of those with powers of representation, decision or control, is likely to be more complicated. As an illustration, entities or persons with 25% or more shareholding (or equivalent for other types of corporate entities) are likely to have powers of representation, decision or control, although those with a lower shareholding may still have the relevant powers depending on their particular rights. Similarly, your ultimate parent company (or equivalent for other types of corporate entities) is likely to have powers of representation, decision or control. Depending on your particular structure, intermediate parent companies who do not have a direct shareholding, directors or members of an executive board of your immediate parent company (for example in the case of an SPV set up specifically to bid for a particular contract), and holders of mortgages or liens may be covered. It isn't necessary to identify which entities and persons you think are covered but you must be satisfied that your declaration is made in respect of all of those that are covered.

Bidder Guidance: Bidders should refer to PPN 007 via the following link for more background and guidance via the following link, if you are in any doubt as to the Contracting Authorities obligations. This PPN does not affect other rights of exclusion via the Legislation associated with this procurement opportunity.

[PPN 007: Contracts with Russia and Belarus - GOV.UK](#)

The Public Procurement Review Service that forms part of the Procurement Review Unit allows government Suppliers and potential government Suppliers to raise concerns anonymously about unfair public sector procurement practice. The government can then investigate and resolve these concerns for Contracting Authorities. To use the Public Procurement Review Service, [read the terms](#) and email [publicprocurementreview@cabinetoffice.gov.uk](mailto:publicprocurementreview@cabinetoffice.gov.uk) or phone 0345 010 3503.

The Contracting Authority confirms that it will keep confidential and will not disclose to any third parties any information obtained from a named Bidders customer contact, other than to the Cabinet Office and/or Contracting Authorities obligations hereby advised herein and defined by the regulations, or pursuant to an order of the court or demand made by any competent authority or body where the authority is under a legal or regulatory obligation to make such a disclosure e.g. a Freedom of Information Request.

## **6.1. Qualification / Conditions of Participation Questionnaire**

6.1.1. Bidders should note that the Conditions of Participation for Parts 1&2 of this procurement procedure require your organisation that intends to bid for this procurement opportunity to register its details on the CDP as a condition of participation.

**Guidance on how to register and use the CDP are via the following link**

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

### **Bidder guidance:**

For absolute clarity a condition of participation is a mandatory requirement in order to be considered for this procurement opportunity.

Bidders must ensure that they provide as a condition of participation prior to the bid submission deadline on the CDP:

- identification of the Bidders associated person(s); and confirmation that each associated person's information, connected person(s), and exclusion grounds information has also been shared via the CDP, which may require you to provide this in a PDF format to the Contracting Authority if interoperability between the CDP and the E-Sourcing provider is not functional, at the time the procurement is run and a confirmation of the Bidders intended sub-contractors names..

Prime/main Bidders must complete the following steps prior to the bid submission deadline:

- \*Register on the CDP (create a PDF if interoperability is not functional)
- submit their most up to date core Bidders information on the CDP, This includes the Bidders:
  - basic information
  - connected person information
  - exclusion grounds information (this includes exclusion information about the Bidders and its connected persons)
- provide that information to the Contracting Authority via the CDP by securing a unique Identifier number / PDF submission.

\*Associated persons do not need to share their economic and financial standing information (unless relied upon to meet conditions of participation related to financial capacity).

If Prime/main Bidders, intend to rely on other Bidders to meet a condition of participation, must ensure that these other Bidders submit and share their connected person and exclusion ground information via the CDP, prior to the bid submission deadline as well.

Bidders that may be consortium members or sub-contractors and, so long as they are not guarantors, they are classified as associated persons. Contracting Authorities are obliged

under the procurement Act 2024 to determine if a prime/main Bidder is an excluded or excludable Bidders by virtue of an associated person being an excluded or excludable Bidder (see section 57 of the Procurement Act 2024). Collecting an associated person's relevant information via the CDP / PDF will support Contracting Authority in determining this, otherwise it will not be possible for the Contracting Authority to evaluate your bid submission. It is essential as a condition of participation that this is done prior to the bid submission deadline.

The Contracting Authority hereby advises and declares to all bidders that as a condition of participation, any organisation bidding accepts without reservation that, that for any bidders awarded a contract, certain details about connected person(s) information must be published in the contract award notice (under regulation 27).

Please note that the Contracting Authority does not have any involvement in regard to the Running and or maintenance control over the CDP, therefore any queries in regards to using this system will need to be via the Cabinet Office CDP Technical help options.

- 6.1.2. Bidders should note that the balance of the procurement opportunities specific Conditions of Participation and Specification, plus award-based questions 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/>**

**PLEASE NOTE QUESTIONS ARE NOT ALWAYS NUMBERED SEQUENTIALLY**

## **Parts 1&2 (Conditions of Participation Questionnaire) – CDP**

This information will be accessed by the Contracting Authority via your organisations unique identifier number through our eSourcing provider against your submission on the CDP / PDF if interoperability between the CDP and the E-sourcing providers portal. Bidders are reminded that it is the organisations responsibility to ensure that the information provided is accurate, up to date and factually correct. Bidders must ensure that the questions are all answered in **full**. Note that every organisation that is being relied on to meet the Conditions of Participation stage shall complete Parts 1 and Part 2 (self-declaration) under the Conditions of Participation Questionnaire as applicable to your organisations structure in bidding this procurement opportunity.

Bidders are required to ensure that they read thoroughly these RFP and RFPQ documents complete with the specification and outcome sought by the Contracting Authority, prior to making your bid submission. If your organisation is in any doubt about what to provide in Parts 1& 2 or you are experiencing technical issues completing this aspect, then this will need to be discussed with the CDP technical help team, not the Contracting Authority nor the eSourcing provider.

## **Part 3 (Conditions of Participation Questionnaire) – eSourcing Provider**

In regard to part 3 of the Conditions of Participation Questionnaire, if your organisation is in any doubt about what to provide in Part 3, or indeed a general question with regards to the outcome sought, then please ensure that you seek a formal clarification with the Contracting Authority, via the eSourcing platform.

If you are experiencing technical issues completing section 3 or any other part of this RFP and RFPQ, please refer to the eSourcing providers help section and contact details in the RFP document. Please do not contact the Contracting Authority in regard to technical assistance in utilising the eSourcing platform.

If any Bidder is found to be an Excluded or Excludable Bidder or non-compliant with any of the Mandatory or Discretionary Grounds, that cannot be remedied to the satisfaction of the Contracting Authority e.g. self-cleaning grounds or an appeal in regard to Debarment, then this shall result in exclusion from further consideration and or any potential award of contract under this procedure. This paragraph nor the RFP are exhaustive in regard to the rights of the Contracting Authority may use under the regulations and ministerial advice and guidance via the Cabinet Office as amended from time to time, that apply to this procurement in regard to the rights to exclude any Bidder.

Associated persons do not need to share their economic and financial standing information (unless relied upon to meet conditions of participation related to financial capacity).

If any Bidder is found to be on the Cabinet Offices PRU unit Debarment list, then this shall result in exclusion from further consideration and or any potential award of contract under this procedure.

For additional Bidder assistance and guidance in regard to the completion and bidding process under this RFP and RFPQ, please refer to the procurement documents provided.

**Bidder guidance** If you are in doubt as to how to answer any question in the procurement documents, please ensure that you seek a formal clarification with the Contracting Authority via the eSourcing portal.

Any reference to “Bidder(s)”, organisation(s) shall mean those named, providing a Bid submission in this procurement procedure.

## PART 1 – PRELIMINARY QUESTIONS

Part 1	Preliminary Questions	
Question Number	Question	Response
Guidance	<p>Please note, all questions denoted with a <b>*(red star)</b> are Mandatory for Bidders to respond to. Failure to provide a response may result in your bid being disqualified.</p> <p>Please confirm that you:</p> <ul style="list-style-type: none"> <li>• are completing the following information on the eSourcing platform for the organisation structure that is bidding this procurement opportunity.</li> <li>• understand that failure to complete mandatory questions, or provide relative supporting information where required to support / validate your response, may result in your bid response being disqualified</li> <li>• understand that if any Bidder is found to be non-compliant or provides misleading or false information, this will result in exclusion from further consideration and or any potential award of contract under this procedure.</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
PSQ_1*	What is your Organisation name	Text
PSQ_2*	<p>You must be registered on the central digital platform (CDP).</p> <p>What is your central digital platform unique identifier?</p>	Text
PSQ_3*	<p>Please confirm if you are bidding as a single supplier (with or without sub-contractors) or as part of a group or consortium.</p> <p>Where you confirm you are bidding as part of a group or consortium, please provide further details in PSQ_3.1</p> <p>Where you confirm you are bidding as a single supplier, please move to PSQ_5</p>	Single Supplier <input type="checkbox"/> Group / Consortium <input type="checkbox"/>
PSQ_3.1	<p>If you are bidding as part of a group or consortium (including where you intend to establish a legal entity to deliver the contract), please provide:</p> <ol style="list-style-type: none"> <li>a. the name of the group/consortium</li> <li>b. the proposed structure of the group / consortium, including the legal structure where applicable</li> <li>c. the name of the lead member in the group / consortium</li> <li>d. your role in the group / consortium (e.g. lead member, consortium member, sub-contractor)</li> </ol>	Attachment
PSQ_4*	Please confirm which lot(s) you wish to bid for	Lot 1 <input type="checkbox"/> Lot 2 <input type="checkbox"/>



PSQ_5*	<p>Are you on the debarment list?</p> <p>If yes, it is mandatory to provide full details within PSQ_5.1</p> <p>If no, please move to PSQ_6</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
PSQ_5.1	<p>If yes, please provide full details of the Debarment / Investigation, if this is not provided within the CDP PDF upload.</p> <p>Where bidders have responded yes, the Contracting Authority will at its sole discretion, review the information provided to determine if your submission is compliant and can be progressed further, or if this must be disqualified in line with Procurement Regulations 2024</p> <p>Failure to provide the required supporting information may result in your bid being disqualified</p>	Attachment
PSQ_6*	<p>You must submit up-to-date core supplier information on the CDP and share this information with us via the CDP (either a share code or PDF download).</p> <p>This includes:</p> <ul style="list-style-type: none"> <li>a. basic information</li> <li>b. economic and financial standing information</li> <li>c. connected person information (these are persons with the right to exercise, or who actually exercise, significant influence or control over the supplier, or persons whom the supplier has the right to exercise, or actually exercises, significant influence or control over, for example: directors, majority shareholders and parent and subsidiary companies)</li> <li>d. exclusion grounds information</li> </ul> <p>Please confirm that your details are correct within the CDP and that you have shared this information with us within PSQ_6.1</p> <p>Yes – Pass No – Fail</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
PSQ_6.1*	Please provide a PDF download of your CDP supplier information.	Attachment

## PART 2 – ADDITIONAL EXCLUSIONS INFORMATION

Part 2A	Associated Persons	
Question Number	Question	Response
Guidance	<p>Please note, all questions denoted with a * are Mandatory for Bidders to respond to. Failure to provide a response may result in your bid being disqualified.</p> <p>Please confirm that you:</p> <ul style="list-style-type: none"> <li>• are completing the following information on the eSourcing platform for the organisation structure that is bidding this procurement opportunity.</li> <li>• understand that failure to complete mandatory questions, or provide relative supporting information where required to support / validate your response, may result in your bid response being disqualified</li> <li>• understand that if any Bidder is found to be non-compliant or provides misleading or false information, this will result in exclusion from further consideration and or any potential award of contract under this procedure.</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
PSQ_7*	<p>Are you relying on any associated persons to satisfy the conditions of participation? (these are other suppliers who might be sub-contractors or consortium members but not a guarantor).</p> <p>If yes, it is mandatory to complete PSQ_8, PSQ_9 &amp; PSQ_10.</p> <p>If no, please move to PSQ_11</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
PSQ_8	For each supplier / associated person, please confirm which condition(s) of participation you are relying on them to satisfy.	Text
PSQ_9	<p>For each associated person, you must confirm they are registered on the CDP and have shared with us their information (either a share code or PDF download):</p> <ol style="list-style-type: none"> <li>basic information</li> <li>economic and financial standing information (if they are being relied upon to meet conditions of participation regarding financial capacity)</li> <li>connected person information</li> <li>exclusion grounds information</li> </ol> <p>Please confirm the name of each supplier / associated person and that you have shared this CDP download information with us within PSQ_9.1</p> <p>Yes – Pass</p>	Text

	No – Fail	
PSQ_9.1	<p>For each supplier / associated person, please provide the share code or PDF download of the CDP supplier information.</p> <p>The eSourcing Portal only permits 1 document upload per question therefore bidders must attach their response as a Zip folder where multiple attachments are being submitted.</p>	Attachment
PSQ_10	<p>Are any of your associated persons on the debarment list?</p> <p>Where bidders have responded yes, the Contracting Authority will at its sole discretion, review the information provided to determine if your submission is compliant and can be progressed further, or if this must be disqualified in line with Procurement Regulations 2024</p> <p>Failure to provide the required supporting information may result in your bid being disqualified</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
PSQ_10.1	<p>If yes, please provide full details of the Debarment / Investigation, if this is not provided within the CDP PDF upload.</p> <p>Where bidders have responded yes, the Contracting Authority will at its sole discretion, review the information provided to determine if your submission is compliant and can be progressed further, or if this must be disqualified in line with Procurement Regulations 2024</p> <p>Failure to provide the required supporting information may result in your bid being disqualified</p>	Attachment

Part 2B	List of all intended Sub-Contractors	
Question Number	Question	Response
PSQ_11*	<p>Do you intend to sub-contract the performance of all or part of the contract?</p> <p>If you are not intending to sub-contract the performance of all or part of the contract, then you are not required to respond to PSQ_11.1 and PSQ_12.</p> <p>If a sub-contractor is unknown at the start of the procurement (or brought in during it), this should be made clear by the supplier and relevant details of the sub-contractor should be provided once their identity and role is confirmed. This information should be shared with the contracting authority as soon as possible and at least by final tenders.</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>

	If you respond yes to this question, it is mandatory to complete PSQ_11.1 and PSQ_12	
PSQ_11.1	<p>Where you have confirmed yes to PSQ_11, please provide:</p> <ul style="list-style-type: none"> <li>a. a list of all suppliers who you intend to sub-contract the performance of all or part of the contract to (either directly or in your wider supply chain)</li> <li>b. their unique identifier (if they are registered on the CDP), or otherwise, a Companies House number, charity number, VAT registration number, or equivalent</li> <li>c. a brief description of their intended role in the performance of the contract</li> </ul> <p>The eSourcing Portal only permits 1 document upload per question therefore bidders must attach their response as a Zip folder where multiple attachments are being submitted.</p>	Attachment
PSQ_12	<p>Please confirm if any intended sub-contractor is on the debarment list.</p> <p>Where bidders have responded yes, the Contracting Authority will at its sole discretion, review the information provided to determine if your submission is compliant and can be progressed further, or if this must be disqualified in line with Procurement Regulations 2024</p> <p>Failure to provide the required supporting information may result in your bid being disqualified</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
PSQ_12.1	<p>If yes, please provide full details of the Debarment / Investigation, if this is not provided within the CDP PDF upload.</p> <p>Where bidders have responded yes, the Contracting Authority will at its sole discretion, review the information provided to determine if your submission is compliant and can be progressed further, or if this must be disqualified in line with Procurement Regulations 2024</p> <p>Failure to provide the required supporting information may result in your bid being disqualified</p>	Attachment

## PART 3 – QUESTIONS RELATING TO CONDITIONS OF PARTICIPATION

Part 3A	Financial Capacity	
Question Number	Question	Response
Guidance	<p>Please note, all questions denoted with a * are Mandatory for Bidders to respond to. Failure to provide a response may result in your bid being disqualified.</p> <p>Please confirm that you:</p> <ul style="list-style-type: none"> <li>are completing the following information on the eSourcing platform for the organisation structure that is bidding this procurement opportunity.</li> <li>understand that failure to complete mandatory questions, or provide relative supporting information where required to support / validate your response, may result in your bid response being disqualified</li> <li>understand that if any Bidder is found to be non-compliant or provides misleading or false information, this will result in exclusion from further consideration and or any potential award of contract under this procedure.</li> </ul>	Yes <input type="checkbox"/> No <input type="checkbox"/>
PSQ_13*	<p><b>Financial Capacity Conditions of Participation</b></p> <p>Please confirm you understand and agree to the Contracting Authority undertaking a Financial Assessment / Credit Check through Dun and Bradstreet to validate the financial stability of your organisation or guarantor (where applicable) to deliver this Contract.</p> <p>Where your Financial Assessment / Credit Check score falls below the credit rating threshold specified in the terms and conditions, the bidder will be required to provide the Financial information as requested by the Contracting Authority.</p> <p>Yes – Pass No – Fail</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
PSQ_14*	<p>Are you relying on another supplier to act as a guarantor?</p> <p>If yes, please complete PSQ_14.1.</p> <p>If no, please move to PSQ_15</p>	Yes <input type="checkbox"/> No <input type="checkbox"/>
PSQ_14.1	Where you are relying on another supplier to act as a guarantor, please provide their name and evidence of their economic and financial standing	Attachment

PSQ_15*	<p>Please confirm whether you already have, or can commit to obtain, prior to the award of the contract, the levels of insurance cover indicated below:</p> <ol style="list-style-type: none"> <li>Employer's (Compulsory) Liability Insurance* = £5 million per claim</li> <li>Public Liability Insurance = £5 million per claim</li> <li>Professional Indemnity Insurance = £2 million per claim</li> <li>Product Liability insurance = £5 million per claim</li> <li>Loss, damage or destruction of any of UKRI's property under the custody and control of the Supplier = £5 million per claim</li> </ol> <p>*There is a legal requirement for certain employers to hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. See the Health and Safety Executive website for more information:  <a href="http://www.hse.gov.uk/pubns/hse39.pdf">www.hse.gov.uk/pubns/hse39.pdf</a>.</p> <p>Mandatory Pass / Fail</p> <p><b>Yes</b> – Pass  <b>No</b> – Fail</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
PSQ_15.1*	<p>Insert details of your insurances already in place or which would be obtained following contract award, including information on how you will obtain the insurance - e.g. a quote.</p>	Text

Part 3A	Legal Capacity	
Question Number	Question	Response
PSQ_17*	<p>Please confirm that you have in place, or that you will have in place by the award of the contract, the human and technical resources to perform the contract to ensure compliance with the UK General Data Protection Regulation and to ensure the protection of the rights of data subjects.</p> <p>Mandatory Pass / Fail</p> <p><b>Yes</b> – Pass  <b>No</b> – Fail</p>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
PSQ_17.1	<p>If yes, please provide details of the technical facilities and measures (including systems and processes) you have in place, or will have in place by contract award, to ensure compliance with UK data protection law and to ensure the protection of the rights of data subjects. Your response should include, but should not be limited to facilities and measures:</p> <ul style="list-style-type: none"> <li>to ensure ongoing confidentiality, integrity, availability and resilience of processing systems and services</li> </ul>	Attachment

	<ul style="list-style-type: none"> <li>• to comply with the rights of data subjects in respect of receiving privacy information, and access, rectification, deletion and portability of personal data</li> <li>• to ensure that any consent-based processing meets standards of active, informed consent, and that such consents are recorded and auditable</li> <li>• to ensure legal safeguards are in place to legitimise transfers of personal data outside the UK (if such transfers will take place)</li> <li>• to maintain records of personal data processing activities</li> <li>• to regularly test, assess and evaluate the effectiveness of the above measures</li> </ul>	
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Part 3A	Technical Ability	
Question Number	Question	Response
PSQ_18*	<p><b>Relevant experience and contract examples</b></p> <p>Please provide details of up to three contracts to meet conditions of participation relating to technical ability set out in the relevant notice or procurement documents, in any combination from either the public or private sectors (which may include samples of grant-funded work).</p> <p>Where this procurement is for goods or services, the examples must be from the past three years.</p> <p>The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided.</p> <p>For consortium bids, or where you have indicated that you are relying on an associated person to meet the technical ability, you should provide relevant examples of where the associated person has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed, or a special purpose vehicle is to be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or members of the special purpose vehicle or sub-contractors (three examples are not required from each member).</p> <p>Please complete the attached document with the information requested, where this information is not provided within your CDP download</p> <p>If you cannot provide at least one example, you must complete PSQ_18.1</p>	Attachment

PSQ_18.1	If you cannot provide at least one example of previous contracts that are relevant to the requirement, in no more than 500 words please provide an explanation for this and how you meet the conditions of participation relating to technical ability – e.g. your organisation is a new start-up, or you have provided services in the past but not under a contract.	Text
PSQ_19*	<p><b>Experience of sub-contractor management</b></p> <p>Where you intend to sub-contract a proportion of the contract, please demonstrate how you have previously maintained healthy supply chains with your sub-contractor(s) (which may be the intended sub-contractor(s) for this procurement, or any others used previously).</p> <p>The description should be limited to 500 words and include, but is not limited to, details of your supply chain management tracking systems to ensure performance of the contract and including prompt payment and whether you are a signatory of the UK Prompt Payment Code (or have given commitments under other equivalent schemes)</p>	Attachment
PSQ_21*	<p><b>Health and safety</b></p> <p>Please describe the arrangements you have in place to manage health and safety effectively and control significant risks relevant to the contract (including risks from the use of contractors, where relevant). Please use no more than 500 words.</p>	Attachment

Part 3B	Tackling Modern Slavery in Supply Chains (PPN 009)	
Question Number	Question	Response
PSQ_30 *	<p><b>Modern Slavery Statement</b></p> <p>Please confirm if your organisation is:</p> <p>A. Supplier is ‘a relevant commercial organisation’* and is compliant with the requirements contained within section 54 of the Modern Slavery Act 2015 and associated guidance</p> <p>B. Supplier is not ‘a relevant commercial organisation’* but has a turnover of more than £36 million</p> <p>C. Supplier is not ‘a relevant commercial organisation’* and has a turnover of less than £36 million</p>	<p>A <input type="checkbox"/></p> <p>B <input type="checkbox"/></p> <p>C <input type="checkbox"/></p>



	<p><i>*‘Relevant commercial organisations’ are defined as commercial organisations that carry on a business or part of business in the UK, supply goods or services and have an annual turnover of £36 million or more.</i></p> <p>If A, please complete PSQ_30.1</p> <p>If B, please complete PSQ_30.2</p> <p>If C, please complete PSQ_30.3</p>	
PSQ_30.1	<p>Where you have confirmed <b>A</b> to PSQ_30:</p> <p>(a)‘Supplier is ‘a relevant commercial organisation’* and is compliant with the requirements contained within section 54 of the Modern Slavery Act 2015 and associated guidance.’</p> <p>Please provide a link of copy of your statement which includes information relating to:</p> <ul style="list-style-type: none"> <li>a. the organisation’s structure, its business and its supply chains</li> <li>b. its policies in relation to slavery and human trafficking</li> <li>c. its due diligence processes in relation to slavery and human trafficking in its business and supply chains</li> <li>d. the parts of its business and supply chains where there is a risk of slavery and human trafficking taking place, and the steps it has taken to assess and manage that risk</li> <li>e. its effectiveness in ensuring that slavery and human trafficking is not taking place in its business or supply chains, measured against such performance indicators as it considers appropriate</li> <li>f. the training and capacity building about slavery and human trafficking available to its staff</li> </ul> <p>(a)Compliant with the MSA and Attachment / Link provided. Attachment / Link provided containing the required information – <b>Pass</b></p> <p>(b)Non-compliant with the MSA (explanation / assurances) Supplier is ‘a relevant commercial organisation’ and is non-compliant with the requirements contained in section 54 of the Modern Slavery Act 2015 and associated guidance and/or its statement does not include the information relating to a to f above. However, a satisfactory explanation has been provided and/or have provided assurances that they will be compliant (where applicable) in advance of contract award.</p>	Attachment

	<p><b>Note:</b> In this circumstance where a supplier has provided a response this will be a – <b>**provisional pass</b>, subject to verification by the Contracting Authority prior to award of contract, if the supplier has provided assurances that they will be compliant in advance of contract award.</p> <p>(b) Provides assurances to be compliant and meets the needs of the section 54 of the Modern Slavery Act 2015 prior to any contract award and to the sole satisfaction of the Contracting Authority Attachment / link provided containing the required information – <b>Pass</b>  (a) &amp; (b) Attachment / <b>**Assurances / Link not provided – Fail</b>  Any failure to provide Assurances to the satisfaction of the Contracting Authority – <b>Fail</b></p>	
PSQ_30.2	<p>Where you have confirmed <b>B</b> to PSQ_30:</p> <p><b>(a)</b> ‘Supplier is not ‘a relevant commercial organisation’* but has a turnover of more than £36 million’</p> <p><i>*‘Relevant commercial organisations’ are defined as commercial organisations that carry on a business or part of business in the UK, supply goods or services and have an annual turnover of £36 million or more.</i></p> <p>Please provided a link of copy of an equivalent statement or document which demonstrates the following information:</p> <ul style="list-style-type: none"> <li>a. the organisation’s structure, its business and its supply chains</li> <li>b. its policies in relation to slavery and human trafficking</li> <li>c. its due diligence processes in relation to slavery and human trafficking in its business and supply chains</li> <li>d. the parts of its business and supply chains where there is a risk of slavery and human trafficking taking place, and the steps it has taken to assess and manage that risk</li> <li>e. its effectiveness in ensuring that slavery and human trafficking is not taking place in its business or supply chains, measured against such performance indicators as it considers appropriate</li> <li>f. the training and capacity building about slavery and human trafficking available to its staff</li> </ul> <p>(a)Compliant with the MSA and attachment / link provided. Attachment / link provided containing the required information – <b>Pass</b></p>	Attachment

	<p>(b) Supplier is not 'a relevant commercial organisation' but has a turnover of over £36 million and has not provided a link to an equivalent statement or document and/or the statement or document does not include information relating to a to f above. However, a satisfactory explanation has been provided and/or they have provided assurances that they will be compliant (where applicable) in advance of contract award</p> <p><b>Note:</b> In this circumstance where a supplier has provided a response this will be a – <b>**provisional pass</b>, subject to verification by the Contracting Authority prior to award of contract, if the supplier has provided assurances that they will be compliant in advance of contract award.</p> <p>(b) Provides assurances to be compliant and meets the needs of the section 54 of the Modern Slavery Act 2015 prior to any contract award and to the sole satisfaction of the Contracting Authority Attachment / link provided containing the required information – <b>Pass</b></p> <p>(a) &amp; (b) Attachment / **Assurances / Link not provided – <b>Fail</b></p> <p>Any failure to provide assurances to the satisfaction of the Contracting Authority – <b>Fail</b></p>	
PSQ_30.3	<p>Where you have confirmed <b>C</b> to PSQ_30:</p> <p>'Supplier is not 'a relevant commercial organisation'* and has a turnover of less than £36 million'</p> <p>Please provided a link of copy of any published statements on modern slavery or other relevant documents containing information of a similar type / level to the points detailed below (where available):</p> <ol style="list-style-type: none"> <li>the organisation's structure, its business and its supply chains</li> <li>its policies in relation to slavery and human trafficking</li> <li>its due diligence processes in relation to slavery and human trafficking in its business and supply chains</li> <li>the parts of its business and supply chains where there is a risk of slavery and human trafficking taking place, and the steps it has taken to assess and manage that risk</li> <li>its effectiveness in ensuring that slavery and human trafficking is not taking place in its business or supply chains, measured against such performance indicators as it considers appropriate</li> <li>the training and capacity building about slavery and human trafficking available to its staff</li> </ol>	Attachment

	<p>Where the information requested is not available, please attach a statement that confirms <i>"We are not a relevant commercial organisation subject to Section 54 of the Modern Slavery Act 2015"</i></p> <p>Attached statement provided – <b>Pass</b></p> <p>Attached statement not provided – <b>Fail</b></p>	
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Part 3B	Confirmations	
Question Number	Question	Response
PSQ_32*	<p>I confirm that:</p> <ul style="list-style-type: none"> <li>to the best of my knowledge the answers submitted, and information contained in this document are complete, accurate and not misleading (Part 1, 2 &amp; 3)</li> <li>upon request and without delay I will provide any additional information requested of us</li> <li>I understand that the response to this questionnaire will be used to assess whether our organisation is entitled to participate in, or continue to participate in, this procurement</li> <li>I understand that our organisation may be excluded from the procurement if requested information has not been provided, if any of this response or any follow up responses are incomplete, inaccurate or misleading, if confidential information has been accessed or if we have unduly influenced your decision-making in this procurement</li> </ul>	<p>Yes <input type="checkbox"/></p> <p>No <input type="checkbox"/></p>
	Name – By way of signature, please enter your name	
	Date – Date confirmed	
	Role – Enter your role within your organisation	
	Phone Number – Enter your phone number	
	Email – Enter your email	
	Postal Address - Enter postal address	

## PART 4 – QUESTIONS PART 3: QUESTIONS (PROCUREMENT SPECIFIC) UKSBS SPECIFIC QUESTIONS.

SEL1.10	<p><b>Information Security</b></p> <p>The information security requirement may include conducting a security assessment based on the Cloud Security Principles on suppliers who access, process or store Personally Identifiable Information (PII), sensitive or confidential data.</p> <p>In addition to this, we require suppliers to have at least one of the following accreditations:</p> <ol style="list-style-type: none"> <li>1. Cyber Essentials certification</li> <li>2. Cyber Essentials Plus certification</li> <li>3. ISO 27001 certification</li> <li>4. ISO 27017 for cloud services</li> <li>5. IASME Governance standard certification</li> <li>6. SOC 2 Type 2 report</li> <li>7. CSA STAR certification</li> </ol> <p>In the absence of any of the above certifications, in <b>SEL1.10.1</b> Bidders should attach for review a copy of their Information Security Policy, that has been approved, and which is in use internally, demonstrating the effective management of risks to the confidentiality, integrity and availability of information.</p> <p>Please refer to the link below for the full NCSC guidance on the cloud security principles:  <a href="https://www.ncsc.gov.uk/collection/cloud/the-cloud-security-principles/responses-to-the-cloud-security-principles">https://www.ncsc.gov.uk/collection/cloud/the-cloud-security-principles/responses-to-the-cloud-security-principles</a></p>
Bidder Guidance	<p>Bidders can answer</p> <p><b>Yes</b> – the requirements are currently in place</p> <p><b>Intend</b> – the requirements are not in place, and we intend to have them in place for commencement of the contract.</p> <p><b>No</b> – the requirements are not in place, and we have no intention of having them in place for commencement of the contract</p> <p>A response of '<b>Yes</b>' or '<b>Intend</b>' will result in a <b>pass</b> and a response of '<b>No</b>' will result in a <b>fail</b> against this question.</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p><b>Options List</b></p> <p><b>Yes</b> – the requirements are currently in place</p> <p><b>Intend</b> – the requirements are not in place, and we intend to have them in place for commencement of the contract.</p>

	<b>No</b> – the requirements are not in place, and we will not have them in place for commencement of the contract
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<b>SEL1.10.1</b>	<b>Supporting Documentation for SEL1.10</b>
Bidder Guidance	<p>Where a Bidder has responded 'Yes' to SEL1.10 please provide a copy of the valid certificate or in the absence of any of the listed certifications a copy of your Information Security Policy, that has been approved and which is in use internally, demonstrating the effective management of risks to the confidentiality, integrity and availability of information.</p> <p>This information should be provided as an attachment to this question.</p> <p>Any Bidder responding Yes to SEL1.10 but not providing evidence may not be considered.</p> <p>Bidders that responded "Intend" to SEL1.10 will be asked to provide evidence of meeting these requirements in order for the contract to be awarded. Failure to evidence compliance to these requirements prior contract award will result in the contract not being awarded to the Bidder.</p>
Scoring Criteria	For Information Only
Answer Type	<b>Attachment</b>

<b>SEL2.12</b>	<p><b>United Kingdom General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018</b></p> <p><b>The UK GDPR is a mandatory requirement for all contracts or agreements both in the Public, Private and Third sectors that involves the transfer, storing and processing of personal data. The UK GDPR sits alongside the Data Protection Act 2018 as the UK's data privacy law that governs the processing of personal data domestically.</b></p> <p><b>The UK GDPR was drafted as a result of the UK leaving the EU, which resulted in the EU's GDPR not applying domestically to the UK any longer. The UK GDPR sits alongside the Data Protection Act 2018. It is mandatory for Bidders to demonstrate that they are able to meet the technical requirements and obligations prescribed by the UK GDPR and Data Protection Act 2018 and that they will adhere to their processing obligations and as detailed in the supporting Schedule 6.</b></p> <p><b>All contracts or agreements that are awarded by the Contracting Authority (the data controller) shall contain terms and conditions that oblige the successful Bidder and any Bidder supply chain (data processor or sub-processors) used under this Contract(s) to comply with their information law obligations and indemnify the Contracting Authority (data controller). Please note that the appointment of any sub-processor/s should only occur after authorisation is received in writing from the Data Controller or UKSBS.</b></p> <p><b>Further information and helpful guidance relating to the UK GDPR is available from the Information Commissioners Office (ICO) at:</b>  <a href="https://ico.org.uk/">https://ico.org.uk/</a></p>
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Bidder Guidance	<p>The Contracting Authority actively encourages all Bidders to ensure that they visit the ICO website via the advised link and understand the implications of information legislation in the UK (including Data Protection Act, UK GDPR and other relevant legislation) and have your Data Protection Officer complete this section if you have one or alternatively seek external professional advice before completing this section of your bid</p> <p>Bidders can answer</p> <p><b>Yes</b> – We can demonstrate full compliance as is required by the UK GDPR now and will adhere to the processing obligations detailed within Schedule 6 – <b>Pass</b></p> <p><b>No</b> – We will not be compliant prior to any award – <b>Fail</b></p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – We can demonstrate full compliance as is required by the UK GDPR and Data Protection Act 2018 now and will adhere to the processing obligations detailed within Schedule 6 – <b>Pass</b></p> <p><b>No</b> – We will not be compliant prior to any award – <b>Fail</b></p>

<b>SEL2.13</b>	<p><b>Data Storage</b></p> <p><b>Please confirm where UK GDPR data, as detailed within the Schedule 6 will be stored for the duration of this Contract, including any additional Countries that data may be transferred to / accessed from throughout the life of this Contract.</b></p>
Bidder Guidance	<p>Bidders are required to confirm where UK GDPR data, as detailed within the Schedule 6, will be stored for the duration of this Contract, including any additional Countries that data may be transferred to / accessed from throughout the life of this Contract.</p> <p>Please note, where successful Bidders confirm that data may be stored, transferred, or accessed outside of the UK, there may be a requirement to include additional Contract Clauses to ensure UK GDPR and Data Protection Act 2018 Compliance prior to Contract Award.</p>
Scoring Criteria	For Information Only
Answer Type	Text

<b>SEL2.19</b>	<p><b>Public Procurement Policy Note 007 - Contracts with suppliers from Russia or Belarus</b></p> <p>The Government introduced its first Public Procurement Policy Note 01/22 'Contracts with suppliers from Russia or Belarus' in response to the invasion of Ukraine by Russia, which was met with unprecedented global condemnation. The UK Government has introduced financial and investment sanctions aimed at encouraging Russia to cease actions which destabilise Ukraine.</p>
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	<p>The revised PPN 007 again requires the Contracting Authority to decline to consider (or otherwise exclude from participating in the procurement) bids from suppliers (or their sub-contractors) who are constituted or organised under the law of Russia or Belarus, or whose 'Persons of Significant Control' information states Russia or Belarus as the place of residency or where materials in the supply chain originate from those states in accordance with Procurement Policy Note PPN 007.</p> <p>Unless exceptions within the PPN apply, the Contracting Authority may exclude from this competition any tenders that are deemed from suppliers (including any subcontractors) who are constituted or organised under the law of Russia or Belarus, or whose 'Persons of Significant Control' information states Russia or Belarus as the place of residency; or materials within the supply chain originate from those states.</p> <p><b>Question 1-</b> Please confirm if the country or territory of origin of any supplies to be used within the supply chain for this contract opportunity is the Russian Federation or the Republic of Belarus.</p> <p><b>Question 2-</b> Please confirm if your own (or your subcontractors) location of business activities or interests of a contractor is constituted or organised under the law of Russia or Belarus, or whose 'Persons of Significant Control' information states Russia or Belarus as the place of residency</p> <p>If you answer Yes to either of the questions above, then you must clearly set out in your attachment provided, why you believe one of the exceptions within PPN 007 apply.</p>
Bidder Guidance	<p>The Bidder shall replicate the above 2 questions in an attachment and answer <b>Yes</b> or <b>No</b> to each of the above, along with an in-depth explanation to any question answered as <b>Yes</b> to achieve a Pass, subject to the satisfaction of the Contracting Authority during its evaluation process and any clarity sought.</p> <p>A failure to provide a supporting justification of an exemption to the satisfaction of the Contracting Authority, may result in your exclusion from further consideration under this procurement.</p> <p>An answer of <b>No</b> is based upon no direct supplies, suppliers (including any subcontractors) who are constituted or organised under the law of Russia or Belarus, or whose 'Persons of Significant Control' information states Russia or Belarus as the place of residency; or materials within the supply chain originate from those states. This statement of <b>No</b> for each question will achieve a Pass</p> <p>A failure to provide a Yes or No upload response may result in your exclusion from further consideration under this procurement.</p> <p>The Contracting Authority may seek at its own discretion further clarification from any bidder in regard to any attachment provided, that seeks to rely upon any exemptions provided in PPN 007.</p> <p>Bidder guidance: Bidders should review PPN007 for further guidance on this area.</p>
Scoring Criteria	Mandatory Pass / Fail



Answer Type	Attachment
SEL2.20	<p><b>Non-UK or Non-Treaty state suppliers and subcontracting arrangements</b></p> <p>The Contracting Authority may at its sole discretion under the PA 2023 and its associated regulations that apply to this procurement; to disregard and excluded any bid it receives in regard to this procurement opportunity from any Bidder that:</p> <p>Is not a United Kingdom Bidder treaty state Bidder or Intends to sub-contract the performance of all or part of the contract to a supplier that is not a United Kingdom supplier or treaty supplier.</p> <p><b>Question 1-</b> Please confirm if you are a United Kingdom Based or a Treaty state Bidder.</p> <p>Option 1 - Yes, we are a United Kingdom Based or a Treaty state Bidder.</p> <p>Option 2 - No, we are not a United Kingdom Based or a Treaty state Bidder.</p> <p><b>Question 2-</b> Do you intend to sub-contract the performance of all or part of the contract to a supplier that is not a United Kingdom supplier or treaty supplier.</p> <p>Option 1 - No, we do not intend to sub-contract the performance of all or part of the contract to a supplier that is not a United Kingdom supplier or treaty supplier.</p> <p>Option 2 – Yes, we intend to sub-contract the performance of all or part of the contract to a supplier that is not a United Kingdom supplier or treaty supplier.</p>
Bidder Guidance	<p>The Bidder shall replicate the above 2 questions and the Option chosen in an attachment and select either Option 1 or Option 2 to each of the above.</p> <p>Any Bidder that Answers Option 1 to both questions is not required to provide an in-depth explanation and will achieve a Pass</p> <p>Any Bidder that has answered as Option 2 to either or both Questions shall provide an in-depth explanation as to this option selected.</p> <p>Any bidder submission selecting any Option 2, complete with an in-depth explanation, shall be subject at the sole discretion and satisfaction of the Contracting Authority to decide, if during its evaluation process and any clarity sought, as to if the Contracting Authority will score a Pass or Fail.</p> <p>Any failure to provide a supporting explanation to the satisfaction of the Contracting Authority, may also result in your exclusion from further consideration under this procurement.</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Attachment

<b>SEL2.21</b>	<b>Subcontracting UK or Treaty based suppliers</b>  Please confirm if you intend to rely upon and use a United Kingdom or treaty-based subcontractor(s) as part of your bid submission as a part of the conditions of participation.
Bidder Guidance	If you have stated Yes, please ensure that you have uploaded the full details on the CDP / or provided this in PDF, prior to the bid deadline to achieve a Pass.  If you have stated, No and do not intend to subcontract any part of the procurement outcome and have not uploaded any details on the CDP, this will achieve a Pass.  This Question must be answered, even if you have been asked to provide specific subcontractor details elsewhere in this questionnaire.
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Attachment if interoperability of the CDP to the E-sourcing provider is not available.

<b>FOI1.1</b>	<b>FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR)</b>  <b>Information provided in the course of the procurement process may be disclosed under Freedom of Information Act 2000 or Environmental Information Regulations 2004.</b>  <b>Please note that some of the information provided may be protected under the FOIA exemptions and EIR exceptions. More information on applying the exemptions or exceptions can be found under the information Commissioners Office (ICO) website <a href="http://ico.org.uk">http://ico.org.uk</a></b>  <b>Please confirm you have been informed that information provided under this Bid may be disclosed under the FOI Act 2000 and Environmental Information Regulations 2004 (both as amended) and agree to it being published irrespective of submitting a successful or unsuccessful Bid.</b>
Bidder Guidance	The Bidder shall answer <b>Yes</b> or <b>No</b>  <b>Yes – Pass</b> <b>No – Fail</b>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Option List  <b>Yes – Pass</b> <b>No – Fail</b>

<b>FOI1.2</b>	<b>FREEDOM OF INFORMATION ACT 2000 (FOI) AND / OR ENVIRONMENTAL INFORMATION REGULATIONS 2004 (EIR) EXEMPTIONS / SUPPLIER ASSESMENT SUMMARIES</b>
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	<p><b>Please complete this section <u>only</u> if you have agreed for your information to be disclosed under the FOI Act or EIR in Question FOI1.1.</b></p> <p><b>If you have not agreed to your information to be disclosed under the FOI Act or EIR in Question FOI1.1, please complete the text field 'N/A' (Not applicable)</b></p> <p><b>If you have agreed for your information to be disclosed under the FOI Act or EIR in Question FOI1.1, please tell us what exemptions or exceptions may apply to your information and why?</b></p> <p><b>Information in regard to the issue of supplier assessment summaries should your bid be successful should also be advised in this document, this saves on duplication.</b></p>
Bidder Guidance	<p>The Bidder shall provide details of their proposed exemptions/exception in the fields below.</p> <p>The Bidder shall note that if the Contracting Authority believes that the suggested exemptions or exceptions have not been applied properly, the Contracting Authority will disclose the requested information unless another exemption or exception can be applied by the Contracting Authority.</p> <p>Be aware that by completing FOI1.1 and answering 'yes' you have agreed for the Contracting Authority to disclose the provided information under the Freedom of Information Act 2000 or Environmental Information Regulation 2004; therefore, you will not be approached for consent.</p> <p>Bidders are required to complete the Text table fields below, highlighting your proposed exemptions to this question.</p> <p>If you are not relying on any exemptions or exceptions, please complete each field 'N/A' (not applicable).</p>
Scoring Criteria	For information only
Answer Type	Confidential Information and justification for exemption/exception under FOI Act / EIR 2004
	Text
	Commercially sensitive information and justification for exemption/exception under FOI Act / Disclosure of winning bidders Assessment Summary
	Text

<b>DEC1.1</b>	<p><b>DECLARATION</b></p> <p>I declare that to the best of my knowledge the answers submitted, and information contained on the CDP (Parts 1&amp;2) / or provided in PDF format and in this completed document (Part 3) are factually correct and accurate.</p> <p>I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document except where this documentation can be accessed by the Contracting Authority via a national</p>
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	<p>database in any country free of charge or the Contracting Authority already possesses the documentation.</p> <p>I understand that the information will be used in the Conditions of Participation process to assess my suitability to participate further in this procurement.</p> <p>I understand that the authority may exclude this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.</p> <p>I am aware of the consequences of serious misrepresentation.</p> <p>Bidder guidance – Mandatory Pass / Fail question</p> <p><b>Yes – I understand and declare acceptance to the above statements.</b>  <b>No – I do not understand and/or I do not declare acceptance to the above statements.</b></p>
Answer Type	<p>Option List</p> <p><b>Yes – Pass</b>  <b>No – Fail</b></p>
<p>Contact details of those making the declaration</p> <p>Contact name</p> <p>Name of organisation</p> <p>Role in organisation</p> <p>Phone number</p> <p>Email address</p> <p>Postal address</p>	

## Section 6 – Questions (Procurement Specific)

### 6.2. Technical and Commercial Questionnaire

- 6.2.1 Bidders should note that the 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/>**

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

## PART 5 – COMMERCIAL QUESTIONNAIRE LOT 1 AND LOT 2

### RFP Governance

AW1.1	<p><b><u>FORM OF BID</u></b></p> <p>I declare that to the best of my knowledge the Bid answers submitted against this RFP are correct. I understand that the information will be used in the process to assess my organisation's suitability to be invited to bid for the Contracting Authority's requirement and I am signing on behalf of my organisation. I understand that the Contracting Authority may exclude this Bid if there is a failure to answer all relevant questions fully or if I provide false/misleading information.</p> <p>I understand that the Government's transparency agenda requires that sourcing documents, including RFP templates such as this, are published on a designated, publicly searchable web site, and, that the same applies to other documents issued by the Contracting Authority, including the RFP, and any contract entered into by the Contracting Authority or its Customers with its preferred Bidder(s) once the procurement is complete in line with the Legislation that applies to this RFP.</p> <p>By submitting a Bid response to this RFP, I agree that our participation may be made public.</p> <p>I understand that the answers given in this response may be published on CDP (but elements may be redacted under Freedom of Information Act 2000 (FOIA) or Environmental Information Regulations 2004 (EIR).</p> <p>By submitting a Bid response to this RFP, I agree and accept the justification for the Contracting Authority's evaluation criteria.</p> <p>By submitting a response to this RFP, I agreed and accept that the Contracting Authority reserves the right to change without notice the procedure for awarding the Contract, to reject any or all bids for the Contract, to stop the process and not award the Contract (in whole or in part) at any time without any liability on its part.</p> <p>By submitting a response to this RFP, I agree and accept that nothing in this process is intended to form any express or implied contractual relationship between the Parties unless and until a Contract is awarded. The Contracting Authority is not liable for any costs resulting from cancellation of this process nor any costs incurred by Bidders taking part in this procurement process.</p> <p>I understand that where sourcing documents issued by the Contracting Authority or contracts with its Supplier(s) fall to be disclosed The Contracting Authority will redact them as it thinks</p>
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	<p>necessary, having regard (inter alia) to the exemptions/exceptions in the FOIA or EIR.</p> <p>I understand that the Contracting Authority is duly bound to provide <b>Assessment</b> summaries of the winning bidder(s) to the unsuccessful bidders, and we have provided, as were appropriate areas of our bid that we deem commercially sensitive in our submission.</p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>AW1.2</b>	<p><b>BID VALIDITY PERIOD</b></p> <p>Our Bid offer shall remain open for acceptance for a minimum period of 90 days from the closing date for receipt of Bids. Unless formally extended by mutual consent and until a formal contract is prepared and executed, being signed by both parties. This Bid and a written acceptance thereof shall not constitute a binding contract between us until such time as the contract is executed.</p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>AW1.3</b>	<p><b>CERTIFICATE OF BONA FIDE BID</b></p> <p>The essence of procurement is that the customer shall receive bona fide competitive Bids, from all those Bidding. In recognition of this principle, we certify that this is a bona fide Bid, intended to be competitive and that we have not fixed or adjusted the amount of Bid by or under or in accordance with any agreement with any other person.</p> <p>We also certify that we have not done, and we undertake that we will not do at any time before the hour and date specified for the return of this Bid any of the following:</p> <p>(a) Communicate to a person other than the person calling for these Bids the amount or approximate amount of the proposed Bid, except where the disclosure, in confidence, of the approximate amount of the Bid was necessary to</p>
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	<p>obtain insurance premium quotations for the preparation of the Bid;</p> <p>(b) Enter into any agreement or arrangement with any other person that he shall refrain from bidding or as to the amount of any Bid to be submitted;</p> <p>(c) Offer to pay or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or have caused to be done in relation to any other Bid or proposed Bid for the said supply / service any act or thing of the sort described above.</p> <p>In this certificate, the word "person" includes any persons and anybody or association, corporate or unincorporated, and any "agreement or arrangement" includes any such transaction, formal or informal, and whether legally binding or not.</p> <p>We acknowledge that the Contracting Authority will be entitled to cancel the contract and to recover from us the amount of any loss resulting from such cancellation if we or our representatives (whether with our without our knowledge) shall have practiced collusion in Bidding for this contract or any other contract with the Contracting Authority or shall employ any corrupt or illegal practices either in the obtaining or execution of this contract or any other contract with the Contracting Authority.</p> <p>We agree that the Contracting Authority may disclose the Bidders information / documentation (submitted to the Contracting Authority during this Procurement) more widely within Government for the purpose of ensuring effective cross-Government procurement processes, including value for money and related purposes.</p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>AW3.2</b>	<p><b>Conflict of Interest</b></p> <p>Please confirm you have nothing to declare with respect to any current or potential interest or conflict in relation to this procurement, or other party that forms part of your submission (where applicable) which could be reasonably perceived to affect the actual or perceived deliverables.</p>
Bidder Guidance	By conflict of interest, we mean, anything which could be reasonably perceived to affect the impartiality of this procurement, or to indicate a professional or personal interest in the outcomes from this procurement.



	<p>The Bidder shall answer <b>Yes</b> or <b>No with justification</b>.</p> <p><b>Yes</b>, we can confirm we are not in a position of a conflict of interest – Pass</p> <p><b>No with justification</b>, we declare all interests and have given full details in response to AW3.2.1. Please refer to AW3.2.1 for details of what amounts to a valid justification - Pass</p> <p>If your situation changes during the procurement process, you must promptly notify the Contracting Authority via the eSourcing Portal if any conflicts of interest arise, or any additional information arise in relation to the conflict of interest you have declared.</p> <p>For absolute clarity should a Bidder select 'Yes' you are not required to respond to AW3.2.1, however if you select 'No with Justification' you will be required to complete AW3.2.1 in order to be considered.</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b>, we can confirm we are not in a position of a conflict of interest – Pass</p> <p><b>No with justification</b>, we declare all interests and have given full details in response to AW3.2.1. Please refer to AW3.2.1 for details of what amounts to a valid justification.</p>
<b>AW3.2.1</b>	<p>Where a Bidder has answered question AW3.2 with 'No with justification' they must provide full details of any current or potential interest or conflict in relation to this procurement (including any subcontractors, SPV, Partnership, Consortium member etc. that the bid submission relies upon where applicable) which could be reasonably perceived to affect the actual or perceived deliverables.</p> <p>Bidders are also required to give a full account of the actions or processes that it will use to ensure that a conflict of interest is avoided. In any statement of mitigating actions, Bidders are to outline how they propose to achieve a robust, impartial and credible approach to the procurement.</p> <p>Bidder must provide a response to this question unless a Bidder has responded 'Yes' to AW3.2 then you are not required to respond to this question.</p>
Bidder Guidance	<p>By conflict of interest, the Contracting Authority means, anything which could be reasonably perceived to affect the impartiality of this procurement opportunity, or to indicate a professional or personal interest in the outcomes from this procurement.</p> <p>If your situation changes during the procurement process, you must promptly notify the Contracting Authority via the eSourcing Portal if any conflicts of interest arise or any additional information arise in relation to the conflict of interest you have declared.</p>

	<p>Where there is an actual or potential conflict of interest, it is suggested the bidding organisation design a working arrangement such that the deliverables cannot be influenced (or perceived to be influenced) by the organisation which is the owner of an actual or potential conflict of interest. For example, consideration should be given to maintain an impartial approach to the procurement opportunity.</p> <p>Bidders are required to give a full account of the actions or processes that it will use to ensure that a conflict of interest is avoided. In any statement of mitigating actions, Bidders are to outline how they propose to achieve a robust, impartial and credible approach to the procurement.</p> <p>The information received will be subject a Pass or Fail, according to whether based on the information provided there remains a conflict of interest which may affect the impartiality of the procurement opportunity and the deliverables.</p> <p>Failure to declare or avoid a conflict of interest at this or a later stage may result in exclusion from the procurement process.</p> <p>Any Bidder selecting 'No with Justification' to AW3.2 and failing to upload an attachment to this question detailing the information above may not be considered further for this opportunity.</p> <p>Bidder guidance: Under the PA2023 and the TPR2024 and its associated legislation the Contracting Authority is obliged to maintain a monitor of Conflicts of Interest during the performance under any contract awarded. On this basis it is essential that any Conflict of Interest identified and resolved at the bidding stage does not revert to its previous position during this time.</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Attachment

### Compliance to the Contract Terms

<b>AW4.1</b>	<b>Please confirm your acceptance of the Contract Terms that can be found within the Instructional Attachments section within this question.</b>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b>, <b>No with justification</b> or <b>No</b></p> <p><b>Yes</b>, we accept the terms and condition in their entirety – Pass</p> <p><b>No with justification</b> – Pass. Complete the document upload attached to AW4.2 with details of what amounts to a valid justification.</p> <p><b>No</b> – Fail</p>

	For absolute clarity should a Bidder select 'Yes' or 'No' you are <b>not</b> required to respond to AW4.2, however if you select 'No with Justification' you will be required to complete AW4.2 in order to be considered.
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Option List  <b>Yes</b> , we accept the terms and condition in their entirety – Pass <b>No with justification</b> – Pass. Complete the document upload attached to AW4.2 with details of what amounts to a valid justification. <b>No</b> – Fail

<b>AW4.2</b>	<p><b>Where a Bidder has answered question AW4.1 with 'No with justification' they must detail the justification and the proposed change to the clause.</b></p> <p><b>Where a Bidder has responded 'Yes' or 'No' to AW4.1 you are not required to respond to this question.</b></p>
Bidder Guidance	<p>A justification for not accepting a specific clause or series of clauses from the attached Contract Terms is that the Bidder would be in breach of legal requirements or statutory regulations by complying with that clause or series of clauses (i.e. for the avoidance of doubt, being unable to comply with a clause or series of clauses because of an internal policy reason will not be considered to be a justification for a legal requirement or statutory regulation).</p> <p>Where the Bidder has answered question AW4.1 as "no with justification", the Bidder shall provide a Contract mark-up utilising track change detailing the relevant clause, the proposed changes to the clause and the justification for the changes. In this case, the Bidder shall score a pass if (but only if) the Contracting Authority considers both the following requirements are satisfied:</p> <ul style="list-style-type: none"> <li>• the reasons stated as justifying the Bidder's statement that it cannot accept the Contract Terms due to legal requirements or statutory regulations are valid; and</li> <li>• the changes submitted do not create significant risk for the Contracting Authority and are reasonably necessary and proportionate to ensure the Bidder complies with the legal requirements and statutory regulations.</li> </ul> <p>In the event of a Bidder answering Yes or No to Question AW4.1 and then providing a proposed mark-up, rejection of a clause or a justification for a change then the response will be a Fail.</p> <p>Any Bidder selecting 'No with Justification' to AW4.1 and failing to upload an attachment to this question detailing the information above may not be considered further.</p> <p><b>Bidders are to note that any requested modifications to the Contracting Authority Terms and Conditions on the grounds of statutory and legal matters only, should be raised as a formal clarification during the permitted clarification period.</b></p>

Scoring Criteria	Mandatory Pass / Fail
Answer Type	Attachment

<b>AW6.1</b>	<b>Please confirm your compliance to the requirements of Section 4 Specification for the Lot(s) you are bidding for.</b>
Bidder Guidance	The Bidder shall answer <b>Yes</b> or <b>No</b>  <b>Yes</b> – Pass <b>No</b> – Fail
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Option List  <b>Yes</b> – Pass <b>No</b> – Fail

## LOT 1 – Training

## TECHNICAL QUESTIONNAIRE FOR LOT 1

<b>L1 – PROJ1.1</b>	<b>Approach to Public Policy Engagement training delivery</b>
Bidder Guidance	<p>Please advise how you will deliver the Public Policy Engagement training, including how you will ensure that the training will equip participants with the skills, knowledge and experience required to enable them to engage effectively with policy makers.</p> <p>Please ensure that the response covers the following as a minimum:</p> <ul style="list-style-type: none"> <li>• The proposed training methodology including suggested number, length (day/half day) of workshops, whether workshops will be face-to-face, online or a mixture of both, and the frequency of face-to-face or online interactions and the reason this chosen methodology will ensure the most successful outcome. Bidders are encouraged to suggest additional and / or alternative innovative activities and provide a rationale for their inclusion.</li> <li>• Describe how the training programme will encourage the cohort approach</li> <li>• Describe how the training programme will help to achieve the core/aims objectives of the policy fellowship scheme</li> <li>• A high-level overview of the proposed training content and how this will be developed, to include any support and additional information that will be required from UKRI.</li> <li>• How you will flex delivery to meet the needs of both experienced and less experienced fellows, while still maintaining a coherent cohort approach.</li> <li>• How you will ensure training content is updated to reflect current policy landscape and developments in higher education research policy, which may affect knowledge exchange and research impact.</li> <li>• An outline of the intended learning outcomes, and how the success of delivery will be measured.</li> <li>• How you intend to cover all areas the training programme should cover as outlined in the Scope of the Specification.</li> <li>• How this training programme provision will offer additional learnings beyond the programme existing opportunities such as host organisation modules, or open access policy engagement resources.</li> </ul> <p>This question is limited to <b>10</b> sides of A4 <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Any bidder which achieves a score of less than 60 in this question will not be considered for appointment.</b></p> <p><b>Maximum Mark: 30.00%</b></p>

Answer Type	Attachment
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<b>L1 – PROJ1.2</b>	<b>Contract Management and Continuous Improvement</b>
Bidder Guidance	<p>Please describe your approach to successfully managing this contract.</p> <p>Please ensure that the response covers the following as a minimum:</p> <ul style="list-style-type: none"> <li>• An effective management structure that has appropriate expertise and plans in place to deliver and manage the contract.</li> <li>• The processes you will use to maintain an effective working relationship with UKRI</li> <li>• How roles and responsibilities will be defined to manage contract performance and continuous improvement, including the main points of contact and escalation procedures.</li> <li>• How you will adapt the training content based on feedback and evaluations.</li> <li>• How you will evaluate the impact of your training, including how you will share evidence of impact and insights with UKRI and its partners</li> <li>• How you plan to work with other providers to ensure that the Training elements of the cohort programmes are delivered in a coordinated and effective way.</li> </ul> <p>This question is limited to <b>5</b> sides of A4 <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Any bidder which achieves a score of less than 60 in this question will not be considered for appointment.</b></p> <p><b>Maximum Mark: 20.00%</b></p>
Answer Type	Attachment

<b>L1 – PROJ1.3</b>	<b>Project Team and Capability to Deliver</b>
Bidder Guidance	<p>Please demonstrate how you will apply your knowledge, skills and expertise that are essential to the successful delivery of this project to effectively deliver the requirements detailed in the specification.</p> <p>Please provide your methodology as to how you will maintain your ability to deliver these throughout the lifetime of the project.</p> <p>Please ensure your response covers the following as a minimum:</p> <ul style="list-style-type: none"> <li>• The key roles within the team, and what skills and expertise they would bring to this project including demonstration that enough time has been committed by individuals in the team to deliver the programme of work proposed.</li> </ul>

	<ul style="list-style-type: none"> <li>• Your awareness of the challenges faced by policy makers in engaging with researchers across the breadth of the UKRI's thematic disciplines</li> <li>• Demonstrate your understanding of researcher/academic development within all areas of UKRI's disciplines and demonstrate expertise in design and delivery of professional development programmes of this kind.</li> <li>• How the project team will focus on relationships with senior policy makers and influencers, to identify and draw on contributors to the training proposed.</li> <li>• Cover for staff absence, planned and Unplanned.</li> <li>• Dissemination of information / amendments</li> <li>• Procedures and practises</li> <li>• External support that would be needed and from whom, to deliver the training. this should include any support from UKRI and its partners.</li> <li>• A detailed forward plan of all proposed activities for the programme and outline the programme content. Detailed plans should also include how the programme meets objectives 1-5 as stated within the specification.</li> <li>• Provide a Risk register relating to the requirement and a description of the probability occurring, the impact of the risk, and your risk management process for delivering the service.</li> </ul> <p><b>Bidders are to note that the Risk Register does not contribute to the page count allowed for this question.</b></p> <p>This question is limited to <b>6</b> sides of A4 <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Any bidder which achieves a score of less than 60 in this question will not be considered for appointment.</b></p> <p><b>Maximum Mark: 20.00%</b></p>
Answer Type	Attachment

<b>L1 – PROJ1.4</b>	<p><b>Social Value – Equality, Diversity and Inclusion</b></p> <p><b>Please outline your approach for supporting equality, diversity, and inclusion, and how this will be embedded within in the UKRI Policy Fellowships Training and Mentoring Programme</b></p>
Bidder Guidance	<p>Bidders should demonstrate how they are engaging and supporting our community, while promoting EDI and creating an environment which promotes dignity and respect for all; covering the following as a minimum:</p> <ul style="list-style-type: none"> <li>• How you will ensure EDI considerations are integrated within the overall programme to ensure the processes are fair and do not present barriers to participation or disadvantage any protected groups from participation</li> </ul>

	<ul style="list-style-type: none"> <li>• How the overall programme will be inclusive, supportive, and welcoming</li> <li>• How you plan to attract participants from under-represented groups</li> <li>• Accessibility requirements of all groups involved</li> <li>• Removal of barriers to engagement and power imbalances</li> <li>• Approach to developing an ethics plan</li> <li>• Safeguarding approach</li> <li>• Approach to developing an Equality Impact Assessment</li> <li>• The on-going process of review and analysis of the approach taken to ensure possible challenges or barriers are mitigated</li> </ul> <p>Suppliers should ensure proposals are in line with UKRI EDI Policies: UKRI's equality, diversity and inclusion strategy – UKRI - <a href="#">UKRI-250321-EqualityDiversityInclusionPolicy-V2.0.pdf</a></p> <p>The question is limited to <b>3</b> sides of A4, font 11pt Arial. <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Maximum Mark: 10.00%</b></p>
Answer Type	<b>Attachment</b>

<b>L1 – AI1.1</b>	<p><b><u>Artificial Intelligence</u></b></p> <p><b>AI tools can be used to improve the efficiency of your bid writing process; however, they may also introduce an increased risk of misleading statements via ‘hallucination’.</b></p> <p><b>Please confirm if you have used AI or machine learning tools, including large language models, to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions</b></p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> –with justification provided in question AI1.2</p> <p><b>No</b></p>
Scoring Criteria	Mandatory For Information Only
Answer Type	<p><b>Option List</b></p> <p><b>Yes</b> – with justification provided in question AI1.2</p> <p><b>No</b></p>

<b>L1 – AI1.2</b>	<p><b>Where a Bidder has answered question AI1.1 with ‘Yes’, please detail any instances where AI or machine learning tools, including large language models, have been used to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions</b></p>
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	<b>Where a bidder has responded 'No' to AI1.1 you are not required to respond to this question.</b>
Bidder Guidance	<p>Where a Bidder has answered question AI1.1 with 'Yes', please detail any instances where AI or machine learning tools, including large language models, have been used to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions</p> <p>Where a bidder has responded 'No' to AI1.1 you are not required to respond to this question.</p> <p>Where AI tools have been used to support the generation of tender responses, please also confirm that they have been checked and verified for accuracy.</p>
Scoring Criteria	For Information Only
Answer Type	Text

## COMMERCIAL QUESTIONNAIRE FOR LOT 1

<b>L1 – AW5.1</b>	<p><b>Please confirm your bid submission price for completion of all the Services as detailed in the Section 4 Specification.</b></p> <p><b>All prices shall be in £ GBP and exclusive of VAT.</b></p>
Bidder Guidance	<p>Bidders shall provide their bid submission price for completion of all Services as detailed in the Section 4 Specification.</p> <p>The scoring methodology for this question shall be:</p> <p>Price will be evaluated using proportionate pricing (lowest bid / bid * mark). A Bidder's score will be based on the lowest total score received divided by their total cost and then multiplied by the marks available.</p> <p>For example, if the total basket price for three bid responses is received and Bidder A has quoted £50,000 as their total price, Bidder B has quoted £80,000 and Bidder C has quoted £100,000 then the calculation will be as follows:</p> <p>(Maximum marks available in this example being 12.5)</p> <p>Bidder A Score = <math>50000/50000 \times 12.5 = 12.5</math>  Bidder B Score = <math>50000/80000 \times 12.5 = 7.81</math>  Bidder C Score = <math>50000/100000 \times 12.5 = 6.25</math></p> <p>This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.</p> <p>The lowest score possible is 0.</p>
Scoring Criteria	<b>Maximum Mark: 20.00%</b>
Answer Type	<b>Numeric (GBP£)</b>

<b>L1 – AW5.2</b>	<p><b>Based on the Bidders AW5.1 bid submission price for completion of all the Services as detailed in the Section 4 Specification, Bidders are now required to complete the attached Excel AW5.2 Pricing Schedule document with a breakdown of all the costs that make up their final bid price.</b></p> <p><b>All prices shall be in £ GBP and exclusive of VAT.</b></p> <p><b>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</b></p>
Bidder Guidance	<p>Based on the Bidders AW5.1 bid submission price for completion of all the Services as detailed in the Section 4 Specification, Bidders are now required to complete the attached Excel AW5.2 Pricing Schedule document with a breakdown of all the costs that make up their final bid price.</p>

	<p>All prices shall be in £ GBP and exclusive of VAT.</p> <p>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</p> <p>The total submitted within your excel pricing schedule must equal the total price submitted in AW5.1</p>
Scoring Criteria	For Information Only
Answer Type	Attachment

<b>L1 – AW5.3</b>	<b>Please confirm your price shall remain firm and fixed for the full term of the Contract.</b>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>L1 – AW5.4</b>	<p><b><u>Maximum Budget</u></b></p> <p><b>As stated within the tender documents, the maximum budget for Lot 1 will be £210,000.00 ex VAT.</b></p> <p><b>Please confirm that your final price submitted within AW5.2 will fall within this budget.</b></p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>AW5.5</b>	<p><b>The Contracting Authority is committed to delivering payments to suppliers within the timescales stated within our Contract terms and intend to embrace e-invoicing.</b></p> <p><b>Further information and helpful guidance regarding e-invoicing and iSupplier is available on the UKSBS website at:</b>  <a href="https://www.uksbs.co.uk/services/Finance/Pages/iSupplier.aspx">https://www.uksbs.co.uk/services/Finance/Pages/iSupplier.aspx</a> </p>
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	<b>Please confirm if you are successfully awarded this contract, that your implementation team will work with the Contracting Authority to ensure that e-invoicing is established within 28 days of Contract award by the Contracting Authority.</b>
Bidder Guidance	The Bidder shall answer Yes or No  <b>Yes</b> – we will utilise an e-invoicing option – Pass <b>No</b> – we will not utilise an e-invoicing option – Fail
Scoring Criteria	Mandatory Pass / Fail
Answer Type	Option List  <b>Yes</b> – we will utilise an e-invoicing option - Pass <b>No</b> – we will not utilise an e-invoicing option – Fail

## LOT 2 – Mentoring

## TECHNICAL QUESTIONNAIRE FOR LOT 2

<b>L2 – PROJ1.1</b>	<b>Approach to Public Policy Engagement mentoring delivery</b>
Bidder Guidance	<p>Please advise how you will deliver Public Policy Engagement mentoring to researchers, including how you will ensure personal and professional development is accelerated, how you will provide tailored support to increase their impact during the fellowship, and inform their future career development.</p> <p>Please ensure that the response covers the following as a minimum:</p> <ul style="list-style-type: none"> <li>• The proposed mentoring methodology including suggested number, length (day/half day) of meetings, whether meetings will be face-to-face, online or a mixture of both, and the frequency of face-to-face or online interactions and the reason this chosen methodology will ensure the most successful outcome. Bidders are encouraged to suggest additional and / or alternative innovative activities and provide a rationale for their inclusion.</li> <li>• Describe how the mentoring programme will encourage the cohort approach</li> <li>• Describe the mentoring programme will help to achieve the core aims/objectives of the Policy Fellowship Programme</li> <li>• How you will flex delivery to meet the needs of both experienced and less experienced fellows, while still maintaining a coherent cohort approach.</li> <li>• A high-level overview of the proposed mentoring content and how this will be developed, to include any support and additional information that will be required from UKRI</li> <li>• How you will ensure mentoring content is updated to reflect current policy landscape and developments in higher education research policy, which may affect knowledge exchange and research impact.</li> <li>• How you intend to cover all areas the mentoring programme should cover as outlined in the Specification.</li> <li>• How this mentoring programme provision will offer additional opportunities beyond learnings that are already available e.g. mentors provided to ECRs through home institutions.</li> </ul> <p>This question is limited to <b>10</b> sides of A4 <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Any bidder which achieves a score of less than 60 in this question will not be considered for appointment.</b></p> <p><b>Maximum Mark: 30.00%</b></p>
Answer Type	Attachment

<b>L2 – PROJ1.2</b>	<b>Contract Management and Continuous Improvement</b>
Bidder Guidance	<p>Please describe your approach to successfully managing this contract.</p> <p>Please ensure that the response covers the following as a minimum:</p> <ul style="list-style-type: none"> <li>• An effective management structure that has appropriate expertise and plans in place to deliver and manage the contract.</li> <li>• The processes you will use to maintain an effective working relationship with UKRI</li> <li>• How roles and responsibilities will be defined to manage contract performance and continuous improvement, including the main points of contact and escalation procedures.</li> <li>• How you will adapt the mentoring content based on feedback and evaluations.</li> <li>• How you will evaluate the impact of your mentoring, including how you will share evidence of impact and insights with UKRI and its partners.</li> <li>• How you plan to work with other providers to ensure that the Mentoring elements of the cohort programmes are delivered in a coordinated and effective way.</li> </ul> <p>This question is limited to <b>5</b> sides of A4 <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Any bidder which achieves a score of less than 60 in this question will not be considered for appointment.</b></p> <p><b>Maximum Mark: 20.00%</b></p>
Answer Type	<b>Attachment</b>

<b>L2 – PROJ1.3</b>	<b>Project Team and Capability to Deliver</b>
Bidder Guidance	<p>Please demonstrate how you will apply your knowledge, skills and expertise that are essential to the successful delivery of this project to effectively deliver the requirements detailed in the specification.</p> <p>Please provide your methodology as to how you will maintain your ability to deliver these through the lifetime of the project.</p> <p>Please ensure your response covers the following as a minimum:</p> <ul style="list-style-type: none"> <li>• The key roles within the team, and what skills and expertise they would bring to this project including demonstration that enough time has been committed by individuals in the team to deliver the programme of work proposed.</li> <li>• Your awareness of the challenges faced by policy makers in engaging with researchers across the breadth of the UKRI's thematic disciplines.</li> </ul>

	<ul style="list-style-type: none"> <li>• Demonstrate your understanding of researcher/academic development within all areas of UKRI's disciplines and demonstrate expertise in design and delivery of professional development programmes of this kind.</li> <li>• How the project team will focus on relationships with senior policy makers and influencers, to identify and draw on contributors to the mentoring approach proposed.</li> <li>• Cover for staff absence both planned and unplanned</li> <li>• Dissemination of information / amendments</li> <li>• Procedures and practises</li> <li>• External support that would be needed and from whom, to deliver the training. this should include any support from UKRI.</li> <li>• A detailed forward plan of all proposed activities for the programme and outline the programme content. Detailed plans should also include how the programme meets objectives 1-5 as stated within the specification.</li> <li>• Provide a Risk register relating to the requirement and a description of the probability occurring, the impact of the risk, and your risk management process for delivering the service.</li> </ul> <p><b>Bidders are to note that the Risk Register does not contribute to the page count allowed for this question.</b></p> <p>This question is limited to <b>6</b> sides of A4 <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Any bidder which achieves a score of less than 60 in this question will not be considered for appointment.</b></p> <p><b>Maximum Mark: 20.00%</b></p>
Answer Type	Attachment

<b>L2 – PROJ1.4</b>	<p><b>Social Value – Equality, Diversity and Inclusion</b></p> <p><b>Please outline your approach for supporting equality, diversity, and inclusion, and how this will be embedded within in the UKRI Policy Fellowships Training and Mentoring Programme</b></p>
Bidder Guidance	<p>Bidders should demonstrate how they are engaging and supporting our community, while promoting EDI and creating an environment which promotes dignity and respect for all, covering the following as a minimum:</p> <ul style="list-style-type: none"> <li>• How you will ensure EDI considerations are integrated within the overall programme to ensure the processes are fair and do not present barriers to participation or disadvantage any protected groups from participation</li> <li>• How the overall programme will be inclusive, supportive, and welcoming</li> <li>• How you plan to attract participants from under-represented groups</li> <li>• Accessibility requirements of all groups involved</li> <li>• Removal of barriers to engagement and power imbalances</li> </ul>

	<ul style="list-style-type: none"> <li>• Approach to developing an ethics plan</li> <li>• Safeguarding approach</li> <li>• Approach to developing an Equality Impact Assessment</li> <li>• The on-going process of review and analysis of the approach taken to ensure possible challenges or barriers are mitigated</li> </ul> <p>Suppliers should ensure proposals are in line with UKRI EDI Policies: UKRI's equality, diversity and inclusion strategy – UKRI - <a href="#">UKRI-250321-EqualityDiversityInclusionPolicy-V2.0.pdf</a></p> <p>The question is limited to <b>3</b> sides of A4, font 11pt Arial. <b>Any additional content provided beyond this will not be considered or scored during the evaluation process.</b> Responses should be submitted in Font Arial 11pt using single line spacing. Please use the Normal margin setting 2.54cm</p>
Scoring Criteria	<p>Scoring shall be based on 0-100 scoring methodology.</p> <p><b>Maximum Mark: 10.00%</b></p>
Answer Type	Attachment

<b>L2 – AI1.1</b>	<p><b><u>Artificial Intelligence</u></b></p> <p>AI tools can be used to improve the efficiency of your bid writing process; however, they may also introduce an increased risk of misleading statements via ‘hallucination’.</p> <p><b>Please confirm if you have used AI or machine learning tools, including large language models, to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions</b></p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> –with justification provided in question AI1.2</p> <p><b>No</b></p>
Scoring Criteria	Mandatory For Information Only
Answer Type	<p>Option List</p> <p><b>Yes</b> – with justification provided in question AI1.2</p> <p><b>No</b></p>

<b>L2 – AI1.2</b>	<p><b>Where a Bidder has answered question AI1.1 with ‘Yes’, please detail any instances where AI or machine learning tools, including large language models, have been used to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions</b></p> <p><b>Where a bidder has responded ‘No’ to AI1.1 you are not required to respond to this question.</b></p>
Bidder Guidance	Where a Bidder has answered question AI1.1 with ‘Yes’, please detail any instances where AI or machine learning tools, including large language



	<p>models, have been used to assist in any part of your tender submission? This may include using these tools to support the drafting of responses to award questions</p> <p>Where a bidder has responded 'No' to AI1.1 you are not required to respond to this question.</p> <p>Where AI tools have been used to support the generation of tender responses, please also confirm that they have been checked and verified for accuracy.</p>
Scoring Criteria	For Information Only
Answer Type	Text

## COMMERCIAL QUESTIONNAIRE FOR LOT 2

<b>L2 – AW5.1</b>	<p><b>Please confirm your bid submission price for Lot 2 for completion of all the Services as detailed in the Section 4 Specification.</b></p> <p><b>All prices shall be in £ GBP and exclusive of VAT.</b></p>
Bidder Guidance	<p>Bidders shall provide their bid submission price for completion of all Services as detailed in the Section 4 Specification.</p> <p>The scoring methodology for this question shall be:</p> <p>Price will be evaluated using proportionate pricing (lowest bid / bid * mark). A Bidder's score will be based on the lowest total score received divided by their total cost and then multiplied by the marks available.</p> <p>For example, if the total basket price for three bid responses is received and Bidder A has quoted £50,000 as their total price, Bidder B has quoted £80,000 and Bidder C has quoted £100,000 then the calculation will be as follows:</p> <p>(Maximum marks available in this example being 12.5)</p> <p>Bidder A Score = <math>50000/50000 \times 12.5 = 12.5</math>  Bidder B Score = <math>50000/80000 \times 12.5 = 7.81</math>  Bidder C Score = <math>50000/100000 \times 12.5 = 6.25</math></p> <p>This evaluation criteria will therefore not be subject to any averaging, as this is a mathematical scoring criterion, but will still be subject to a commercial review.</p> <p>The lowest score possible is 0.</p>
Scoring Criteria	<b>Maximum Mark: 20.00%</b>
Answer Type	<b>Numeric (GBP£)</b>

<b>L2 – AW5.2</b>	<p><b>Based on the Bidders AW5.1 bid submission price for completion of all the Services as detailed in the Section 4 Specification, Bidders are now required to complete the attached Excel AW5.2 Pricing Schedule document with a breakdown of all the costs that make up their final bid price.</b></p> <p><b>All prices shall be in £ GBP and exclusive of VAT.</b></p> <p><b>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</b></p>
Bidder Guidance	<p>Based on the Bidders AW5.1 bid submission price for completion of all the Services as detailed in the Section 4 Specification, Bidders are now required to complete the attached Excel AW5.2 Pricing Schedule document with a breakdown of all the costs that make up their final bid price.</p>

	<p>All prices shall be in £ GBP and exclusive of VAT.</p> <p>All costs appearing elsewhere in the Bid but not mentioned in this Pricing Schedule shall be presumed waived.</p> <p>The total submitted within your excel pricing schedule must equal the total price submitted in AW5.1</p>
Scoring Criteria	For Information Only
Answer Type	Attachment

<b>L2 – AW5.3</b>	<b>Please confirm your price shall remain firm and fixed for the full term of the Contract.</b>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>L2 – AW5.4</b>	<p><b><u>Maximum Budget</u></b></p> <p><b>As stated within the tender documents, the maximum budget for Lot 2 will be £150,000.00 ex VAT.</b></p> <p><b>Please confirm that your final price submitted within AW5.2 will fall within this budget.</b></p>
Bidder Guidance	<p>The Bidder shall answer <b>Yes</b> or <b>No</b></p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – Pass <b>No</b> – Fail</p>

<b>AW5.5</b>	<p><b>The Contracting Authority is committed to delivering payments to suppliers within the timescales stated within our Contract terms and intend to embrace e-invoicing.</b></p> <p><b>Further information and helpful guidance regarding e-invoicing and iSupplier is available on the UKSBS website at:</b>  <a href="https://www.uksbs.co.uk/services/Finance/Pages/iSupplier.aspx">https://www.uksbs.co.uk/services/Finance/Pages/iSupplier.aspx</a> </p>
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	<b>Please confirm if you are successfully awarded this contract, that your implementation team will work with the Contracting Authority to ensure that e-invoicing is established within 28 days of Contract award by the Contracting Authority.</b>
Bidder Guidance	<p>The Bidder shall answer Yes or No</p> <p><b>Yes</b> – we will utilise an e-invoicing option – Pass  <b>No</b> – we will not utilise an e-invoicing option – Fail</p>
Scoring Criteria	Mandatory Pass / Fail
Answer Type	<p>Option List</p> <p><b>Yes</b> – we will utilise an e-invoicing option - Pass  <b>No</b> – we will not utilise an e-invoicing option – Fail</p>