**NB – Anything in red text needs to be completed by you.**

**NB – Anything is green text is advisory, you are encouraged to read this and make your decisions based on the content, deleting the green text before sending out the RFQ thereafter.**



# REQUEST FOR QUOTATION

**for Supply of XXXX**

**Reference: XXXX**

**INSTRUCTIONS – RESPONDING TO THIS REQUEST FOR QUOTATION**

**1 Introduction**

 Aberystwyth University wishes to purchase **XXXX**. The appointment will be by a process of competitive quotation. The requirement is set out in the Specification herein.

**2 Submission of Written Quotation**

 The Prospective Supplier/s are required to submit a written quotation either as a pdf or word document via **etenderwales/Sell2Wales** **(delete and update as appropriate)**, to be submitted no later than **XX:XX** on XX/XX/2015.

Your response must bear the Quotation reference: **XXXX**

The Quotation and all accompanying documents are to be in English. All details of the Quotation, including prices and rates, are to remain valid for acceptance for the period of **XX** months for the closing date. Quotations should be priced in pounds sterling (GBP) and all payments made in pounds sterling.

Date issue tender documents XX/XX/2015.

Closing date XX/XX/2015.

Estimated contract award date XX/XX/2015.

**Queries relating to this Request for Quotation**

 Any query in connection with the invitation to provide a quotation shall be submitted via etenderwales.

**Acceptance of the Quotation**

The University does not undertake to accept the lowest Quotation, or part, or all of any Quotation, and the acknowledgement of receipt of any submitted Quotation shall not constitute any actual or implied agreement between the Institution and the Supplier. The University reserves the right to accept any part, or all, of any Quotation or Quotations at its sole discretion. The University will consider all Quotations correctly submitted and will select one or more with a view to reaching a contractual agreement subject to clarification of any outstanding matters. During the evaluation period, the University reserves the right to seek clarification in writing from the bidders, to assist it in its consideration of their quotation, if necessary. Each Quotation will be checked for compliance with all requirements of the Specification. Quotations which are not substantially complete or which are non-compliant with the specification may be rejected. The University reserves the right to evaluate Quotations before declaring them non-compliant.

As part of the procurement process, each bidder must be prepared accept the Terms and Conditions as set out in this RFQ.

Specification & weighted award criteria

**Quotation for Supply of XXXX**

**Background –**

Please provide a proposal to meet the specification including all cost related information also. The enclosed Bid Scoring Matrix shows how we will score the elements of your proposal.

MODERN SLAVERY ACT

The University requires an undertaking from all bidders that there is no use of child labour, slavery, forced or bonded labour or human trafficking in their supply chains nor is your organisation involved in modern slavery or exploitation of workers in any way. This includes provision of safe, hygienic and humane working conditions, working hours that are not excessive, and no discrimination is practiced in recruitment or in the workplace.

For information, the University has a full statement on our website which can be found [here](https://www.aber.ac.uk/en/media/departmental/humanresources/pdfs/AU-Modern-Slavery-and-Human-Trafficking-Statement---November-2016.pdf).

Please confirm that none of the above occurs in your supply chains or organisation  YES/NO

Aberystwyth University wishes to procure **XXXX**. The requirement is set out in the Specification herein.

***Enter specification of requirements here.***

***The attached specification checklist will help you do this.***

**Award Criteria**

The following weighted criteria will be used to evaluate bids with a view to selecting the preferred bidder:-

***Please list Weighted Award Criteria hereunder – 100% for this RFQ – equivalent to 100 or 1000 marks (as you deem appropriate).

E.G.***

***Technical Merit 60%***

***(Made up of compliance with specification 30%, added value 20%, warranty 10% for example)***

MODERN SLAVERY ACT

The University requires an undertaking from all bidders that there is no use of child labour, slavery, forced or bonded labour or human trafficking in their supply chains nor is your organisation involved in modern slavery or exploitation of workers in any way. This includes provision of safe, hygienic and humane working conditions, working hours that are not excessive, and no discrimination is practiced in recruitment or in the workplace.

For information, the University has a full statement on our website which can be found at <https://www.aber.ac.uk/en/media/departmental/humanresources/pdfs/AU-Modern-Slavery-and-Human-Trafficking-Statement---November-2016.pdf>.

Please confirm that none of the above occurs in your supply chains or organisation  YES/NO

 ***Price/Cost 40%

and for each award criteria please think about what question or questions you want to ask.

Question types are typically:-

(i) Scored questions with an importance weighting.
(ii) Pass/fail ‘killer’ questions (not scored) where the wrong answer eliminates a bidder.***

***(iii) Pass/fail ‘killer’ questions (not scored) but where a positive answer includes a supplementary question asking for further details and/or evidence about the positive answer (which is scored).

Only ask questions that you understand how to assess and know what a model answer looks like.***

***Increasingly, buyers are either putting examples of model answers into the ITT alongside each question or alternatively listing below each question in their RFQ the typical key factors they are looking for in the answer, to be as open and transparent as possible in terms of how bidder responses might be scored. Admittedly, this seems to be somewhat like setting an exam paper and writing down the answers but it is the way some public purchasers seem to be nevertheless moving, perhaps because of concerns about litigation by aggrieved bidders for a lack of transparency, or because it is perceived good practice?***

***Bid Scoring Matrix***

***Tender Ref: XXXX***

**TENDER ANALYSIS SHEET**

|  |  |
| --- | --- |
| Supplier:/Contractor : |  |
| Product/service: | Supply of **XXXX** |

|  |  |
| --- | --- |
| **Main Criteria :** | **Weighting (%)**  |
| **1. TECHNICAL** | **XX** |
| **2. PRICE** | **XX** |
|  | **100/1000** |

|  |  |  |  |
| --- | --- | --- | --- |
| **1. TECHNICAL – marks total(XX % OVERALL WEIGHTING)** | Sub Weighting(%) | Score  | Reasons for Score in each case |
| Technical specification |  |  |  |
| **List all sub criteria here with weighting re-emphasized** | **XX%****XX%****XX%** |  |  |

***SUMMARY :***

|  |  |  |
| --- | --- | --- |
| **Main Criteria :** | **Weighted Scores B/F** | **Overall Weighted Score**  |
| **TECHNICAL**  |  |  |
| **PRICE**  |  |  |
| 100% | TOTALS  |  |

Any additional Comments/observations (as appropriate):

***Suggest there needs to be more than one member of the evaluation panel. Whilst there is nothing in legislation that suggests that there should be more than one member, only having only one member adds pressure to that one person and restricts the collective knowledge of the panel to that of one person. It is not hard to see an unsuccessful bidder arguing that one score from the one specific individual involved does not give a score that truly reflects the bid. The most common panel size is three. Certainly if a panel of three is used then the collective knowledge and experiences of the panel is more likely to give a score that fairly reflects the bid. As a matter of good practice, the same people should mark each and every bid objectively and those scores should be recorded. The starting point must be that the panel is there to mark each bid and therefore they must be competent to mark all bids received.***

|  |  |  |  |
| --- | --- | --- | --- |
| Evaluer 1 :  | Print Name: | Signed: | Date: |
| Evaluer 2:  | Print Name: | Signed: | Date: |
| Evaluer 3 :  | Print Name: | Signed: | Date: |

**SCORING METHODOLOGY**

The scoring methodology applied to all technical related factors is as follows:

**METHODOLOGY FOR NON-PRICE RELATED SCORING**

The scoring methodology applied to all technical (non-price) related factors is as follows:

|  |  |  |
| --- | --- | --- |
|  **Satisfaction of Requirement/s**  | **Evidence** | **marks awarded for each question** |
| Bidder will not be able to meet the needs of the purchaser.  | No evidence provided or evidence which does not comply with any answer submission size criteria (e.g. number of sides of A4 etc) | 0 |
| Significant risk that the bidder will not be able to meet the needs of the purchaser.  | Evidence has major gaps, and/or is unconvincing in many respects and/or may majorly lack credibility and/or may be largely irrelevant to the question asked.  | 20 |
| Small risk that bidder will not be able to meet the needs of the purchaser.  | Evidence has minor gaps, and/or to a small extent is unconvincing, and/or lacks some credibility and/or may be slightly irrelevant to the question asked.  | 40 |
| Bidder is likely to be able to meet most of the needs of the purchaser.  | Evidence is sufficiently credible and relevant to the question asked. | 60 |
| Bidder is likely to be able to meet or exceed the needs of the purchaser..  | Evidence is comprehensive, credible and relevant to the question asked.  | 80 |
| Bidder is likely to be able to meet or exceed the needs of the purchaser.  | Evidence is comprehensive, highly credible of high quality and relevant to the question asked. | 100 |

* Each member of the evaluation team reads the original questions & criteria set out in the documents;

• Each evaluator reads each question and answer in bid 1, and scores using the above matrix. Each evaluator records their marks and the reasons for those marks.

• Move to bid 2 and repeat;

• After all bids are evaluated by each member of the evaluation team, a group discussion may need to be held amongst all members of the evaluation team where moderation will be used to question and test the understanding of certain matters where it appears that outliers exist in the evaluation scores awarded by different evaluators. In such a scenario, any evaluator may, however, retain their original view that they have rightly scored differently from the other team members. Once moderated (as applicable – it may not always be required) individual scores will be averaged between the evaluators (to 2 decimal points) and this average figure will then be multiplied by the sub criteria importance weighting overleaf to give the final score for each question e.g:-

3 evaluators score an answer to a sub criteria weighted as 70% importance (max 70 marks) as follows –

40, 60 and 60 marks respectively = 160 in total.

Moderation is decided not to be needed in this case.

The 160 score is then divided by 3 to give an averaged mark of 53.33.

This averaged mark of 53.33 is then expressed as a percentage of the maximum number of marks available for the question to give the final score i.e. 70 x 53.33 (percent) = 37.33 marks awarded.

• After the last bid is averaged/moderated, return to a random selection and examine the marks to check that the reasons for the marks awarded are consistent and credible and then;

• The record of marks and reasons is signed by each panel member.

**PRICE/COST RELATED SCORING**

***Draft the text explaining what is required in pricing terms & how price will actually be scored e.g. show a pricing grid for completion by the bidders, the associated formula(s) and disclose this information to the bidders by placing them here.***

***You also need to think carefully how you will score price/cost and also what is to be scored. Some examples include:-***

***1. The "standard differential" method.

This assumes that the lowest price (excluding abnormally low bids) will attract full marks. The other bids are then ranked comparatively to that lowest bid. There are a number of options in UK procurement practice for implementation of this method. The most common option is to give each tenderer 100% of the available marks less the percentage by which their tender is more expensive than the lowest (e.g. if the lowest bidis £100,000 and the next lowest bid £108,000 that bid would score 92% of the available marks);***

***2. "Fit to the budget" method.***

***The “fit to the budget” method is based on the maximum price you are willing to pay for a particular contract. Bids above this amount could, for example, be automatically excluded (i.e. a ‘killer’ price question).

You should come up with this maximum price after having estimated the market price for the works, services or supplies involved, taking into account the contractual conditions attached (e.g. delivery date, quality, warranty features etc) and your own budgetary constraints.***

***This method is considered to be very transparent, not only because the scores of each bidder will depend on a price that has been identified and already disclosed by you (i.e. will not depend on future unforeseen tender elements, such as the lowest price), but also because the maximum price you are willing to pay gives bidders an additional indication of the relative importance of price as an award criterion when evaluating quotes.***

***If you set a maximum price which is higher than the prevailing market price, that means you are willing to pay more than the “average price” for that particular contract, which should be the result of giving a relative higher importance to other criteria such as quality/technical merit. On the other hand, if you set a maximum price which is lower than the prevailing market price, that means you are only willing to pay a relatively smaller amount for that particular contract, which should be the result of considering price the most important of your award criteria.***

***This method assumes that the maximum price will attract zero marks and all bids above this maximum price shall be excluded. Indeed, this maximum price acts as a “competition cap”: bidders compete with each other for the best price score below that cap, i.e. bids are ranked comparatively to that maximum price. The ranking system can be implemented in many different ways.***

***The maximum price can also be combined with the optimal price that you consider to be ideal for a particular contract, which puts pressure on the bidders to make an effort to reach that optimal price. In this case, a simple equation is usually used which that that the maximum price will attract zero marks and the optimal price will attract 100% of the available marks. Furthermore, you may decide whether to give 100% or 100%+ of the available marks to bids whose prices are even lower than the optimal price.***

***In either case, the procurement section can advise on appropriate wording to explain commercial scoring to bidders, once you have chosen.***