Contents

Introduction .................................................................................................................. 03
Before you start ........................................................................................................... 05
Appointing a supplier to deliver research requirements ........................................... 10
   1. Obtain a supplier shortlist from the Marketplace ............................................... 10
   2. Capability Assessment (optional) ....................................................................... 10
   3. Issue your specification .................................................................................... 11
   4. Review proposals from suppliers ..................................................................... 12
   5. Face-to-face presentation stage (optional) ....................................................... 12
   6. Award the contract ......................................................................................... 13
   7. Provide feedback to suppliers ....................................................................... 13
Managing your contract and being a good customer .................................................. 14
Other agreements ....................................................................................................... 15
   Annex 1: Timetable for appointing a supplier ......................................................... 17
   Annex 2: Specification writing guidance .................................................................. 18
   Annex 3: Document checklist before issuing your call for competition ................ 20
   Annex 4: Evaluation matrix and score definitions .................................................. 21
Introduction

This guidance has been produced by the Crown Commercial Service (CCS) and Government Communication Service (GCS) to help you understand how to use the Research Marketplace (RM6018) via a Dynamic Purchasing System (DPS).

This guidance document covers:
- How to use the Marketplace to identify a supplier list
- What to include in your specification
- The information you need to provide when issuing a call for competition
- Managing your contract with your appointed supplier

The guidance provides you with the best practice approach to using the agreement. If you have a particularly complex requirement you may wish to seek additional advice from your own commercial team.

What is the Research Marketplace agreement?

The Research Marketplace has been established to enable government and public sector to commission market, social and economic research expertise and services. The principles and benefits of using the agreement are:
- The right suppliers hear about opportunities at the right time
- Accessible route for suppliers to apply and register their interest (at any time)
- A dynamic filtering system, giving customers flexibility based on requirements
- Quality and price can be assessed based on individual customer’s requirement
- An efficient structure and approach to commissioning research, option of using a two-stage competition process
- Agility and flexibility to meet government’s changing needs in existing and emerging research areas
- Fully compliant with UK and EU regulations

The agreement can be used for any size of research project, there is no minimum or maximum value. You can select the areas of work you want to commission to produce a shortlist of suppliers; this enables you to select as broad or as specific range of suppliers as is appropriate for your requirement.
Who is on the Research Marketplace?
We have a wide range of social, market and economic research organisations on the Marketplace who are interested in working with the public sector. New suppliers can apply to join the Marketplace at any time, they identify the areas of work they specialise in as part of the application process. Once an application is complete, the process to assess and appoint a supplier to the Marketplace may take up to a maximum of 15 working days but is often much shorter than this.

The basic process
Appointing a supplier through the Research Marketplace includes the following key steps:

1. Define your objective and the issues you are trying to address with your research
2. Develop your written specification with defined outcomes and deliverables
3. Use the Marketplace to obtain a supplier shortlist
4. Option of using a Capability Assessment to identify the suppliers that can meet your requirements
5. Issue your final specification, evaluation criteria and associated weightings to identified suppliers
6. Receive and evaluate written proposals from suppliers
7. Inform unsuccessful suppliers providing feedback and evaluation scores.
8. Conduct a face-to-face presentation and evaluate (optional)
9. Award the contract to the successful supplier and confirm the award to CCS
10. Provide feedback and evaluation scores

There are additional optional steps that you can take depending on your requirement, which are outlined in detail within this document.

Who can use the agreement?
This agreement can be used by all UK public sector bodies which includes:

- Central Government Departments, Arm’s Length Bodies and Executive Agencies
- Non Departmental Public Bodies
- Devolved administrations
- NHS bodies
- Local Authorities
- Charities
- Universities, colleges, schools, further education providers

The role of Crown Commercial Service (CCS)
CCS’ role is to provide you with advice and guidance to help you get the best out of the Marketplace. We can help with any queries you may have such as the best way to appoint a supplier and advice on structuring your evaluation criteria.

CCS manages the overarching Marketplace and the suppliers at agreement level. You are responsible for managing the contract with your appointed supplier. CCS is able to help with any issues you may have that require escalating, see how to manage your contract for further details.

If CCS currently undertakes procurement activity on your behalf please email customerops.communications@crowncommercial.gov.uk to seek advice at the earliest opportunity. If you have any other queries please email us at commscategryteam@crowncommercial.gov.uk or call our Customer Service Desk on 0345 410 2222.
Before you start

Getting approval to spend
Before using this agreement you should ensure that you have applied for and received the necessary budget approval and agreed your procurement strategy.

Allow sufficient time for proposals and evaluation
You should agree who will evaluate the proposals and presentations (if used) before you run a competition and build in enough time to evaluate the responses. Ideally, allow up to 6 - 8 weeks to complete the process, which is from the date of issuing your competition to contract award. An example timetable has been provided in Annex 1.

Your tender process should be proportionate to the value and complexity of your requirement. Suppliers will need a reasonable period of time to review and prepare a response. This includes allowing sufficient time for suppliers to ask clarification questions and consider your answers before the deadline for written responses.

Agree how you want to work with the supplier
There are different types of arrangements you can have with suppliers using the Research Marketplace agreement, for example:

- **Project specific agreement**
  A contract for a specific research project, within a time period.

- **Defined term agreement**
  A call-off contract for a fixed period of time to work on any number of research projects. Your contract will need to cover the range of services you will need during the term and should be considered when establishing your evaluation criteria and associated weightings.

- **Retainer agreement**
  A call-off contract for a fixed period of time where you agree to pay a research supplier a firm retainer fee on a regular basis.

The maximum duration of contracts under the agreement is four years. We recommend a fixed term with the option for one or more extensions i.e. a 2+1+1 or a 3+1, to give you flexibility. Please seek advice from your commercial function regarding the most suitable type of agreement for your requirements.
Using the Marketplace

The flow diagram sets out the best practice approach to using the Marketplace.

1. Define your research policy and objectives
2. Create high level project specification with key requirements
3. Create initial supplier shortlist for pre-market engagement to assist with developing your requirement
4. Export a refreshed supplier shortlist from the Marketplace
5. Identify evaluation criteria, panel and any special requirements
6. Finalise project specification incorporating any responses from pre-market engagement, if used
7. Option to use Capability Assessment stage
8. Publish full project specification to all suppliers from your shortlist, include your timescales, deliverables and evaluation criteria
9. Evaluate all written proposals received against evaluation criteria and scoring
10. Sign contract and confirm award details to CCS
11. Award contract to successful supplier and inform unsuccessful suppliers
12. Invite a shortlist of suppliers to present their proposal and evaluate their presentation
13. Provide feedback to all suppliers who participated

Key
- Required
- Optional
Identifying the research objective

The first step to procuring a supplier is identifying what you need them to investigate, along with the outcome required.

SMART objectives are the best place to start, however not every issue will be so clear cut at this stage. The important points to establish are:

- The project objectives
- The target group for the project
- The role of research in meeting those objectives
- Any significant barriers to reaching this objective

**Tip:** Sometimes pinpointing objectives can take time but it’s time well spent to ensure your research achieves the desired outcome.

Writing your specification

The stronger the specification, the better the result. Focus on the research objective and provide any relevant data that will help suppliers to understand your requirement with the information and analysis needed. It should be clear how policy, communications and other colleagues will be able to apply the findings of the research to inform the decisions they make.

**Tip:** We have produced a sample template showing the type of information you need to include in your project specification, please see Annex 2. This template is not mandatory and can be amended according to your requirements.
**Evaluation criteria**

You will need to decide in advance what information you need from suppliers and include this in your specification. Evaluation criteria must be linked to your requirements. This will allow suppliers to see how their proposals will be evaluated and the weightings that will be applied against the quality and price scores. We recommend an 80% quality / 20% price split, however you can choose the overall weightings and sub-criteria.

The suppliers have provided contract examples as part of their selection process of being appointed to the Marketplace. You can request to see evidence of these examples as part of your compliance check prior to awarding your contract, further detail on this process is in the [award section](#). As generic contract examples have already been provided by suppliers when joining the Marketplace, you should not assess this in your call for competition criteria. You may seek relevant experience of personnel assigned to perform the contract to ensure they can meet the specified level of quality.

If you are including a presentation stage, you will need to allocate a percentage score for this stage. The weighting split between stage one written and stage two presentation will vary depending on the requirement, however you would expect to allocate a higher weighting for the first stage which includes quality and price elements. Please set different evaluation criteria for each stage and ensure the weightings for both stages add up to 100% of your quality score. Please specify the maximum number of suppliers you will invite to the presentation and/ or the minimum score mark in your specification. You must ensure that those invited to participate at the presentation (stage two) have sufficient written (stage one) scores to enable them to win the competition.

The Research Marketplace has pricing thresholds which is benchmarked by an independent body. It has the maximum charge for each role type which suppliers cannot exceed. Suppliers are expected to be competitive in the rates offered to customers, you should use the pricing thresholds to check they are within the maximums and to help evaluate on price.
Pre-market engagement (optional)

You may find it useful to communicate with suppliers ahead of issuing your final specification by undertaking a pre-market engagement exercise. Please ensure this activity is undertaken in a fair and transparent way providing each supplier in your shortlist with an equal opportunity. This will allow you to further shape your specification, gather ideas on new innovations and understand if there are any changes within the market that may influence your requirements.

If you decide to speak to the industry ahead of your call for competition, you must prepare an outline of your specification before you contact suppliers, this can be done using a draft specification. You will need to contact all the suppliers from your shortlist but you can choose how you contact them - for instance you can email them for information, invite them to an event or meeting to discuss your requirement or issue a formal Request for Information. This stage is for informal information gathering. If suppliers do not engage at this stage, don’t assume that they do not want to participate. All suppliers shortlisted from your Marketplace search should have the option to bid when you issue your call for competition.

Dos and don’ts checklist:

Do
✓ Contact all suppliers from your shortlist
✓ Provide a reasonable time limit to email requests to make sure suppliers know when they need to respond by
✓ Keep an audit trail of all communication

Don’t
✗ Limit contact to suppliers that you know
✗ Contact suppliers in different ways; each supplier should be given an equal opportunity to respond (i.e. don’t email some suppliers and phone others to discuss your requirements)
✗ Forget that all suppliers can bid when you issue your final specification
Appointing a supplier to deliver research requirements

This section covers the process on how to invite suppliers to your call for competition. You will need to engage with your procurement function prior to making any contact with suppliers.

1. Obtain a supplier shortlist from the Marketplace
Customers are able to access the Marketplace by following these steps:

1. Register or log-in to the DPS
2. Navigate to the Research Marketplace
3. Choose the ‘Access as a buyer’ option and confirm your acceptance of the customer access agreement
4. Click on ‘create new category export’ and use the filters to reflect your specification and create your supplier shortlist
5. Save your filtered shortlist by clicking on ‘Save category’ and give the shortlist a unique name specific to your competition.
   Export the list of suppliers from the Marketplace
6. Invite all the suppliers on the shortlist to a call for competition using a tendering portal

We recommended that the exported supplier list is used within 2 working days, as new suppliers may be added at any point, thus changing the list of suppliers eligible to compete. Please refresh your final list as necessary.

2. Capability Assessment (optional)
You can start your call for competition using a capability assessment stage, this will help you to identify which suppliers from your shortlist are going to be the most suitable. You may wish to run this process to refine your shortlist or to assess capability of meeting your requirement.

You can use a series of yes and no questions that are mandatory for suppliers to pass to get to the written stage - you could, for example, use the ability to meet your stated deadline as a question. Please use questions that relate to key requirements only at this stage, and not those that you could score in the written stage.

You do not need to send the final specification to suppliers who have deselected themselves in a capability assessment unless you make material changes to the specification as a result of the exercise.

Tip: We have provided a template capability assessment which you can use, see the agreement webpage. The template is not mandatory and can be amended according to your requirements.
3. Issue your specification

Your completed specification along with all other relevant documents, must be issued to all shortlisted suppliers, unless they have deselected themselves in a capability assessment. This can be done either via the CCS online procurement tool (eSourcing), your organisations own procurement tool or by emailing suppliers. Please invite the contact listed in your exported shortlist to reach the right supplier contact.

Using a portal gives an auditable approach to the tender process. It is used to:

- Respond to clarification questions
- Track bid responses
- Send reminders to bidders
- Communicate to successful and unsuccessful suppliers
- Provide feedback to all parties

Please refer to the eSourcing user guidance for further information on using CCS’ portal.

Tip: A checklist of everything that you will need to include in your call for competition has been provided in Annex 3.

Dos and don'ts checklist:

Do:

- State that the competition is being run through the CCS Research Marketplace agreement (RM6018) at the start of competition documents
- Provide a clarification period for suppliers to ask questions
- Specify any particular requirements that need to be fulfilled
- Include an indicative budget or range
- Provide a clear deadline for responses
- State whether there will be a face-to-face presentation and what format this will take
- Make sure that your requirements, documentation and evaluation are proportionate to the value and complexity of your specification
- Ensure suppliers have equal access to information during the competition process and publish all responses to questions asked or clarifications raised to all suppliers involved

Don’t:

- Be overly prescriptive, give the supplier space to propose an innovative solution
- Use acronyms or civil service terminology - use plain English
- Overwhelm the reader with excessive data
- Forget to disclose any conflict of interest issues you may have in your specification
4. Review proposals from suppliers

All suppliers will need to provide a written proposal in response to your specification. It is recommend that you assign three people to evaluate the proposals as this makes reaching an objective decision easier. Responses should not be discussed outside of the evaluation team and pricing information should be treated as commercially sensitive. Make sure that you maintain a fully documented audit trail of the results and final award decision, which will be useful when providing feedback to the participating suppliers.

Tip: To help make reviewing proposals easier, a template has been developed for scoring written proposals. See Annex 4.

5. Face-to-face presentation stage (optional)

After reviewing written proposals, you may choose to invite suppliers with the best written response to present their proposal as an opportunity for face to face dialogue.

A face-to-face presentation will allow suppliers to present more detailed proposals and answer any specific questions you may have regarding their written response. It is also a great opportunity for you to meet the operational team and better understand the skills and expertise they will bring to your project.

If you decide to include a face-to-face presentation, you should outline from the outset of your call for competition how many suppliers you expect to invite, ideally three, and the criteria you are looking for and scoring them on. You should only invite suppliers who have a realistic chance of winning the competition to the presentation stage. The evaluation panel should prepare the structure of the meeting and it is recommended to share this with the shortlisted suppliers so that they are able to properly prepare.

Evaluation of presentations should form part of your overall quality score. The weighting for the presentation must be published in your call for competition from the outset. You should not repeat the questions asked in the initial written stage.

Tip: We have produced an example evaluation matrix in Annex 4 to help you score proposals.

Dos and don'ts checklist:

Do:
✓ State in your call for competition whether you intend to hold a face-to-face presentation
✓ Stipulate that supplier's presentation team should ideally include the key people that will be working on your project
✓ Ensure the suppliers are aware of any technology or other logistical restrictions for the presentation
✓ Inform suppliers in advance of who will be on the evaluation panel and their role in the organisation/project
✓ Communicate any additional information that comes out of the face-to-face presentation stage to all shortlisted suppliers

Don't:
X Discuss additional information with a particular supplier that has not been shared with another
X Share any information regarding a particular supplier's approach
X Introduce new elements to the specification
6. Award the contract

As part of your compliance check before awarding your contract, you have the option to request evidence of contract examples, insurance and cyber certificates provided by the suppliers on the Marketplace. To do this, you will need to log-in to the Marketplace and navigate back to your saved search. Find the supplier(s) you wish to see further information for and click on ‘see evidence’. The suppliers will then be sent a notification and will give you access to see the evidence.

Following the successful completion of your competition evaluation you can now award a contract to the successful supplier. Once you have the relevant internal approvals in place you can notify all participating suppliers of the outcome. A standstill period is not mandatory but can be used voluntarily for high value contracts.

You must use the letter of appointment to form your contract, which is aligned to the contract terms set out in the agreement. There are some sections of this contract that you can alter depending on your organisation and requirements.

The letter of appointment must be completed by the customer prior to being sent to the supplier for signature. The document includes guidance so you understand how to fill in the relevant sections.

Once your contract has been signed, please send your award details to commscategoryteam@crowncommercial.gov.uk, including:

- Contract name
- Contract length (including any extension options)
- Contract total value
- Winning supplier name

Please remember to fulfil your organisation’s transparency requirements and publish details of your award on Contracts Finder, where necessary.

7. Provide feedback to suppliers

You should provide constructive, written feedback to all participating suppliers and include a full breakdown of their scoring. Feedback comments should be objective and link back to the evaluation criteria. This will help suppliers understand how they can improve for future opportunities.
Managing your contract and being a good customer

The focus is to work in partnership with our suppliers. A collaborative approach will allow us to make the best use of their knowledge and expertise to help us carry out the best research.

Our obligations as customers

There are a number of obligations we have as customers. These include:

- Providing a clear specification setting out your requirements (services and deliverables) and timelines of each phase of work
- Communicating with your supplier on a regular basis to discuss progress and research performance
- Promptly addressing any issues with your supplier
- Agreeing at the start of the project how frequently you expect to receive reports from your supplier, this should be in line with the requirements in your specification.
- Pay your supplier within 30 days of approving the invoice. Check invoices against the rates and deliverables agreed in your contract

You should be able to rely on your supplier to give you expert advice and consultation that comes from its collective wisdom and experience. A good supplier will explain its strategy, offer honest advice and acknowledge when the topic has shifted outside of its expertise. As a customer, you should also proactively advise the supplier on anything it needs to know to deliver the best results.

How to manage issues

By ensuring you have regular communication with your supplier you should be able to avoid any major issues. In the event that you do experience performance issues with your supplier, you should take the following steps to address the issue as quickly as possible.

1. Raise the issue with your supplier lead and / or commissioner lead as soon as possible
2. Clearly set out your concerns and agree a plan of action with the supplier including a deadline for resolution - put in place more frequent status updates if necessary.
3. If the issue is not resolved by the agreed deadline, escalate the matter internally and to supplier directors
4. If the issue is not resolved by the agreed deadline, contact the CCS Marketplace manager to notify them and agree next steps
5. If you have carried out all reasonable steps to rectify the issue, allowed time for recourse and are still not satisfied, then you will need to decide how to resolve the issue with internal colleagues and CCS.
Other agreements

There are other agreements and options that you may wish to consider to deliver your project.

- **Behavioural Insights framework** - a multi-supplier single lot agreement for sourcing applied behavioural insights services. Suppliers under the agreement can help inform policy and service design by using behaviour change, with an emphasis on finding innovative ways of encouraging, enabling and supporting people to make better choices for themselves.

- **Media Monitoring framework** - a multi-supplier agreement for the provision of press, online, social media, broadcast monitoring. This also includes human-driven evaluation and analysis of the monitored media.

- **Campaigns Solutions** or **Communication Services** - multi-supplier frameworks to help deliver any communications resulting from your research findings.
## Glossary of terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specification</td>
<td>This is the equivalent of a Statement of Requirement and forms part of your call for competition.</td>
</tr>
<tr>
<td>Contract Terms</td>
<td>A legally binding agreement for the provision of services made between a customer and supplier. This is completed following a call for competition.</td>
</tr>
<tr>
<td>Call for competition</td>
<td>Is undertaken to establish which of the suppliers can offer the best value for your specific needs. Your specification and supporting documents are issued for this tendering process.</td>
</tr>
<tr>
<td>Capability Assessment</td>
<td>An optional stage in the further competition process which allows the customer to pass or fail suppliers before the written proposal stage.</td>
</tr>
<tr>
<td>Request for Information</td>
<td>Is the name of the document used when collecting information for your pre-market engagement exercise.</td>
</tr>
</tbody>
</table>
# Annex 1

## Timetable for appointing a supplier

The timetable below provides an example of the timescales that are involved in a call for competition, from the date of issuing your tender to contract award. Please engage with your commercial function when planning the timetable.

You should allow up to 6 - 8 weeks if you choose all recommended options. You may require more time for more complex, high value projects.

<table>
<thead>
<tr>
<th>Task</th>
<th>Required/Optional</th>
<th>Task owner</th>
<th>Working days</th>
<th>Weeks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tender issued</td>
<td>Required</td>
<td>Customer</td>
<td>Day 1</td>
<td>Week 1</td>
</tr>
<tr>
<td>Deadline for submission of Capability Assessment</td>
<td>Optional</td>
<td>Supplier</td>
<td>Day 4 - 5</td>
<td>Week 1</td>
</tr>
<tr>
<td>Evaluation of Capability Assessment</td>
<td>Optional</td>
<td>Customer</td>
<td>Day 6 - 7</td>
<td>Week 2</td>
</tr>
<tr>
<td>Shortlisted agencies from Capability Assessment notified</td>
<td>Optional</td>
<td>Customer</td>
<td>Day 7 - 8</td>
<td>Week 2</td>
</tr>
<tr>
<td>Deadline for the submission of clarification questions</td>
<td>Required</td>
<td>Supplier</td>
<td>Day 11</td>
<td>Week 3</td>
</tr>
<tr>
<td>Deadline for response to clarification questions</td>
<td>Required</td>
<td>Customer</td>
<td>Day 12 - 13</td>
<td>Week 3</td>
</tr>
<tr>
<td>Deadline for submission of proposals</td>
<td>Required</td>
<td>Supplier</td>
<td>Day 16 - 17</td>
<td>Week 4/5</td>
</tr>
<tr>
<td>Evaluation of proposals</td>
<td>Required</td>
<td>Customer</td>
<td>Day 18 - 21</td>
<td>Week 4/5</td>
</tr>
<tr>
<td>Shortlisted agencies notified</td>
<td>Optional</td>
<td>Customer</td>
<td>Day 22</td>
<td>Week 5</td>
</tr>
<tr>
<td>Face-to-face presentations</td>
<td>Optional</td>
<td>Customer and Supplier</td>
<td>Day 31 - 32</td>
<td>Week 7</td>
</tr>
<tr>
<td>Evaluation of face-to-face presentation</td>
<td>Optional</td>
<td>Customer</td>
<td>Day 33 - 34</td>
<td>Week 7</td>
</tr>
<tr>
<td>Award contract</td>
<td>Required</td>
<td>Customer</td>
<td>Day 35 - 36</td>
<td>Week 8</td>
</tr>
<tr>
<td>Project inception meeting</td>
<td>Required</td>
<td>Customer and Supplier</td>
<td>Day 38</td>
<td>Week 8</td>
</tr>
</tbody>
</table>
Annex 2

Specification writing guidance
Drafting a Research Specification

The section will take you through the following areas of developing your supplier project specification. A good research specification (sometimes also called a research brief) should include all of the following:

1. **Title**
   This notifies the reader of the focus of the project.

2. **Summary**
   Use this section to set out the nature of the issue and the project specification to the supplier. The supplier should be able to use the summary to decide whether it would be appropriate for them to bid for your work. Make sure you cover:
   - A clear and specific description of the problem, explaining why research is needed
   - A short summary of your objectives
   - Any mandatory services required e.g., defining methodology sought or particular project outputs
   - Who the customer for the work is (e.g., are multiple central departments going to use the findings?)
   - Expected project length

3. **Background to the issue**
   Use this section to provide detailed information on the background to the policy, service or campaign..

   **Make sure you cover:**
   - Outline the issue the project relates to
   - Explain who you are as a customer - don’t assume the supplier knows your department/organisation
   - Set out any campaign or policy information the supplier needs to understand
   - Provide data, existing research and any useful links

4. **Research objectives**
   What is the aim of the research? This should be clear-cut, detailing the overall policy or communications objective plus a bullet point list of specific objectives. If you already have SMART objectives you should include these here.

   **5. Target participant group**
   Detail of the audience or population to be targeted by the research. This information will help suppliers determine an appropriate methodology for sampling and data collection. The target required needs to be unambiguous.

   **Make sure you include:**
   - Any data you have on target population size
   - Current insight, including segmentations, focus group work etc.
   - Sample size of named stakeholders or influencers and whether you have contact details for them, if relevant
6. Suggested approach and analysis
Use this section to explain your proposed approach (if you have one). If you do have an existing approach you should be very clear where/if you are seeking new ideas. The project specification should encourage suppliers to problem solve rather than being prescriptive in its strategy. You should be clear in this case that you wish the supplier to develop the approach and what it needs to consider in doing so.

Make a clear statement of the type and complexity of analysis needed. For quantitative data, stipulate what kind of cross-tabulation headings and statistics will be needed. The researcher will need these details to formulate the research design (sample size and type) and determine the resources that will be required.

Be sure to specify requirements for sub-contracting if you have any.

7. Outputs
The deliverables required – such as data tables, reports, summaries and presentations of the research findings. Detail if interim reports are necessary.

8. Liaison arrangements
The requirements for contact and liaison throughout the research project. Is there a team or advisory group the researcher will need to meet? What are the envisaged frequency, type and reporting details required?

9. Timings
Give dates for awarding the contract, completion of the research – and any interim deadlines. This will help in the planning of what is feasible.

e.g. the successful agency will be notified by [date]. A project set-up meeting is scheduled at [department] for [date]. We require the research to be complete and reported by [date].

10. Budget
A guide that will allow the researcher to work out what is possible within the money available. A guideline budget also results in competitive proposals that can be judged on equal terms.

e.g. the budget for this project, including expenses and any respondent incentive payments is £45,000 (excluding VAT). A detailed breakdown of costs is required within the proposal.

11. Form of proposal
A clear statement of how the proposal should be presented. This might include a list of headings for the proposal, the order of the headings and the detail required.

e.g. a proposal of a maximum of eight pages is required by [date]. Project team CVs can be included as an appendix, along with any additional company information you think is relevant.

The proposal should contain the following:
- A succinct summary of the proposal
- Details of the approach and external data sources to be used in support of this work, including your rationale for choosing this approach
- A demonstrable understanding of [research approach and sector]
- Your organization’s experience of similar projects and [relevant] research capability
- Details of the personnel to be involved including their role for this project and their relevant experience
- Arrangements for managing this work and quality assuring outputs, including how you would like to work with BSI during the project
- A detailed budget, including a breakdown of time and costs per activity and per team member

12. Evaluation criteria
The basis on which the research contract will be awarded. The criteria could include – suitability of methodology; cost; experience in the area; evidence of understanding the brief.
# Annex 3

Document checklist before issuing your call for competition

<table>
<thead>
<tr>
<th>Document</th>
<th>Checked?</th>
</tr>
</thead>
<tbody>
<tr>
<td>State RM6018 Research Marketplace at the start of your competition document</td>
<td></td>
</tr>
<tr>
<td>Dates for the clarification period</td>
<td></td>
</tr>
<tr>
<td>Tender timetable which sets out the high level stages of the process and when you intend to award and start the contract</td>
<td></td>
</tr>
<tr>
<td>Detail on the process and evaluation of the Capability Assessment stage (if used)</td>
<td></td>
</tr>
<tr>
<td>Detail on the process, evaluation and weighting of stage one written proposals</td>
<td></td>
</tr>
<tr>
<td>Detail on the process, evaluation and weighting of the presentation stage (if used)</td>
<td></td>
</tr>
<tr>
<td>Appendices (if used)</td>
<td></td>
</tr>
<tr>
<td>Letter of appointment and contract terms</td>
<td></td>
</tr>
<tr>
<td>Tendering instructions (detail on the submission process specific to your organisation)</td>
<td></td>
</tr>
<tr>
<td>Procurement tool registration details (if inviting suppliers to your organisation’s own portal)</td>
<td></td>
</tr>
</tbody>
</table>
The table below provides an example scoring matrix with potential weightings that can be used during the evaluation process. You can adapt this to reflect your individual requirement:

<table>
<thead>
<tr>
<th>Weighting</th>
<th>Score 0-100</th>
<th>Evaluator comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality stage 1 written - 60%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objectives</td>
<td>15%</td>
<td></td>
</tr>
<tr>
<td>Methodology and approach</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Implementation</td>
<td>30%</td>
<td></td>
</tr>
<tr>
<td>Scoring</td>
<td>25%</td>
<td></td>
</tr>
<tr>
<td>Quality stage 2 F2F presentation (optional) - 20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>F2F presentation</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>Quality stage 1 &amp; 2 total:</td>
<td>80%</td>
<td></td>
</tr>
<tr>
<td>Price - 20%</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>Quality and Price total</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

The table below provides example score definitions that can be used during the evaluation process, you can adapt the mark score i.e. by using a 1 - 5 point scale or amend the score definition based on the complexity of your requirement. You may wish to include a minimum pass mark for questions considered vital:

<table>
<thead>
<tr>
<th>Mark</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Failed to provide confidence that the proposal will meet the requirements. An unacceptable response with serious reservations.</td>
</tr>
<tr>
<td>25</td>
<td>A poor response with reservations. The response lacks convincing detail with risk that the proposal will not be successful in meeting all the requirements.</td>
</tr>
<tr>
<td>50</td>
<td>Meets the requirements – the response generally meets the requirements, but lacks sufficient detail to warrant a higher mark.</td>
</tr>
<tr>
<td>75</td>
<td>A good response that meets the requirements with good supporting evidence. Demonstrates good understanding.</td>
</tr>
<tr>
<td>100</td>
<td>An excellent comprehensive response that meets the requirements. Indicates an excellent response with detailed supporting evidence and no weaknesses resulting in a high level of confidence.</td>
</tr>
</tbody>
</table>
Contact Information

If you need general advice about using Crown Commercial Service please contact our helpdesk:

Email: info@crowncommercial.gov.uk
Phone: 0345 410 2222

Should you require further information in relation to your brief please email:

Email: commscategoryteam@crowncommercial.gov.uk
Email: gcscampaigns@cabinetoffice.gov.uk

Website: www.gov.uk/ccs
Twitter: @gov Procurement
LinkedIn: Crown Commercial Service