



**INVITATION TO
TENDERER GUIDANCE**

**CUSTOMER RELATIONSHIP
MANAGEMENT SYSTEM (CRM)**

Project Reference: 564

Jan 2021

Closing date: 29th January 2021



Contents

GLOSSARY OF KEY TERMS.....	3
ABOUT ASTON UNIVERSITY	4
1 INTRODUCTION.....	5
2 GENERAL CONDITIONS	14
3 FRAMEWORK AGREEMENTS	Error! Bookmark not defined.
4 EVALUTION OF TENDERS.....	17
5 AGREEMENT	Error! Bookmark not defined.
6 FREEDOM OF INFORMATION ACT	20
7 DOCUMENTS	204
 USEFUL LINKS	 22

GLOSSARY OF KEY TERMS

A detailed description of the requirement, together with formal definitions of the most important terms and phrases, are given in the rest of the document. For Tenderers convenience however, the following key terms, which are used throughout this document, are defined as follows:

Agreement	means the legally binding arrangement between parties as to a course of action.
Contract	means this contract let by the Customer under 564 - Customer Relationship Management System (CRM).
Customer	means Aston University “Aston”.
Goods	means Goods provided by the Supplier in performance of the agreement.
Invitation to Tender	means this document, inviting Tenderers to submit a Tender under this tender opportunity.
Supplier	means the Supplier appointed by Aston University as a result of this Invitation to Tender.
Services	means the requirements of Aston for the Services/Goods/Works as detailed in the specification.
Tender	means the Tender submitted by the Tenderer to the Customer.
Tenderer	means an organisation that submits a completed Tender in response to this Further Competition.

ABOUT ASTON UNIVERSITY

Aston University - No 1 for business and the professions

Founded in 1895 and a University since 1966, Aston is a long established research-led university known for its world-class teaching quality, and strong links to business and the professions. Aston has been a leading university for graduate employment success for over 25 years.

Outstanding graduate employability

More than 82% of Aston graduates go on to a graduate level job within six months. We have strong relationships with national and international graduate employers, as well as smaller and local employers. These relationships are extremely important and make a real contribution to graduate employability.

Career focussed courses

Aston's close and established links with business, the public sector and the professions ensure that our career focussed degree programmes are inspiring, challenging and constantly updated to equip students with essential work-related skills and experiences.

Excellence in teaching and research

We are committed to high quality teaching and academic excellence, ensuring we provide the highest standard of education to our students. Aston has an excellent reputation for research which shapes and improves lives. We're proud of the quality of our research and the real world applications developed as a result – it makes a substantial and beneficial difference to people, organisations and society.

International outlook

Aston University is a popular choice for international students. We recognise and welcome the important academic contribution and cultural diversity international students bring to our university environment. Students from over 120 countries study at Aston University each year

Birmingham – one of Europe's liveliest cities

Birmingham is internationally recognised as a leader in leisure, entertainment, shopping and sport. It is an international centre for business, commerce and industry, housing numerous UK and overseas banks and law firms. Birmingham attracts 25 million visitors each year and contributes billions to the national economy through manufacturing and engineering.

A green, sustainable campus in a city centre location

Located in the heart of a vibrant city, the university is very accessible via an extensive network of motorways and railways. Our 40 acre campus houses all the university's academic, social and accommodation facilities for our students.

For more information visit our website at: www.aston.ac.uk

1 INTRODUCTION

Aston University invites you to submit a tender for the delivery of a Customer Relationship Management (CRM) System.

Delivered through a programme of digital transformation projects, Aston University is implementing a Digital Strategy that will enable the University to thrive in a more complex digital environment driven by human centred design and user experience digital journeys. The strategy has identified a number of key transformation projects that will enable the University to get to the desired 'future digital state'. The University has selected (Microsoft) Dynamics as the preferred and enterprise wide platform to serve as the foundation for an amount of this transformation.

Aston University are therefore seeking to appoint a 3rd party delivery partner to work with the University to design, develop and implement a CRM System using Microsoft Dynamics.

Subsequent to the decision to use the Dynamics platform, a series of reviews of the University's key business operations (including processes and systems) has been undertaken within the scope of the University's digital programme transformation projects.

The University has concluded that a new software solution to support and enhance the performance and efficiency of the business operation is required and consequently:

- a review and analysis of the "off the shelf" packaged software solutions that are available in the market and that have the potential to meet the needs and improve the performance of the business operation will be completed; and
- if the review and analysis determine that there is no packaged software solution that meets the need described above, the University will proceed to develop and build a solution on the Dynamics platform.

The above process has been completed for two business operations:

1. **Curriculum Management** which supports the management and control of the production, review, approval, publication and evaluation of teaching content (a critical part of the University's operations) – the outcome of the activities referenced above was that there is no suitable packaged solution that would meet the University's requirements and that a Curriculum Management System (CMS) should therefore be developed using the Dynamics platform.
2. **Customer Relationship Management (CRM)** which supports marketing, recruitment and enquiry management - the outcome of the activities referenced above was that there is no suitable packaged solution that would meet the University's requirements and that a CRM solution should therefore be developed using the Dynamics platform. This conclusion and recommendation was presented and approved by the University's Digital Investment Strategy Committee (DISC).

The Curriculum Management has already been tendered and the University entered into a contract with the appointed supplier.

The CRM project will entail the University deploying a single, enterprise-wide, cloud-based CRM system for managing interactions and relationships with key beneficiaries and stakeholders. Therefore, the University is seeking to appoint a 3rd party delivery partner to work with the University to design, develop and implement a CRM system using Microsoft Dynamics. The partner would work in partnership with the University's Project Management Office and Digital Services Team to lead the transformation, challenge business processes and implement the technology platform.

The content below sets out: i) the rationale for the work; ii) the University's requirements; and iii) the format in which to return your tender (should you opt to).

Objectives

The University recognises that deployment of technology is a key enabler in improving the quality of engagement with prospective and existing beneficiaries (primarily students and businesses).

Through implementing a CRM system, the University is aiming to:

- Improve the user experience through increased visibility, responsiveness, consistency and accuracy.
- Reduce number of disparate systems and manual processes and develop a single view across the University.
- Improve insight into the recruitment cycle from enquiry through to enrolment and better link the data throughout the student journey.
- Enhance process automation.
- Improve target marketing and personalisation – enabling content to be tailored to specific groups, or stages and to better understand the effectiveness of marketing interventions and other related communications.

Specification

The University recognises the benefits of (and would prefer) to set out the detailed requirements and approach under the guidance of the appointed delivery partner.

The University does not wish to procure a deployment of Dynamics which includes a form of propriety IP 'layer' such as one or more bespoke HE 'accelerators'. Rather, the University wishes to procure a deployment that relies on the Microsoft HE accelerator and keep bespoke development to a minimum.

In broad terms however, it is envisaged that the CRM system will be implemented over a 3 year period and delivered in 3 distinct phases:

Phase 1: Roll out to prospective Students with associated teams undergoing the change to the new processes and systems. This will be undertaken using an agile approach working

with the teams involved to identify the priority functions. The University wants to have a minimum viable product / release ready for use at the start of the 2022 intake cycle from October 2021.

Phase 2: Roll out to business engagement, current students (including placements), alumni and government community organisations. These will be delivered individually with the project team working closely with the University teams and departments related to this functionality.

Phase 3: Roll out and implement the CRM to include (but not limited to): research; suppliers; accrediting bodies; external examiners and internal communications.

For Phases 2 and 3, a further 12-18 months maximum for both of them after the minimum viable product in Phase 1 is completed in October 2021. Bidders will need to demonstrate how they will achieve these timescales.

The University teams with responsibility for the above areas and hence in scope of the project are:

The teams, functions and departments who will be involved in the implementation of the CRM are as follows:

- Admissions, Recruitment (Phase 1)
- Outreach.
- Marketing and Communications (Phase 1)
- International Office.
- Research & Knowledge Exchange.
- Careers and Placements.
- Alumni
- Student & Academic Services
- Academic School Staff
- Estates
- Library
- Learning Development Centre

a) Requirements

With reference to the comment above on detailed requirements, in very general terms, a functional CRM system, configured in Dynamics is required to fulfil the following functions and capabilities:

General

- Contact (student) details (from SITS, to include demographic/contact, prior education provider)
- Contact (business, organisation, employer) details
- Social media associated with contacts
- Contact management
- Files sync and share (including media files)
- Role-based views
- Workflow and approvals
- Customizable fields
- Mobile business card scanning
- Email templates
- Email scheduling
- Email tracking
- Note annotations
- Notes field for additional information not recorded elsewhere

Contact management

- Information request (including prospectus, research etc.)
- Capture enquiry additional enquiry data.
- Source of enquiry record.
- Contact status (including influencer).
- School/college/employer (degree apprenticeship) address.
- Organisation/other constituent relationships.
- Follow up actions.
- Record of communications.
- Online enquirer portal (targeted to user group).
- Online FAQs.
- Degree apprenticeships pipeline of enquiries.

- Tags & Flags for contacts (students, businesses, employers).
- Front end/portals for students and employers.
- Broken relationship management 'handle with care'.
- Measurable outcomes e.g. revenue, volunteering, referrals.

Events

- Event information (date, time, location etc.)
- Event type (including open days, HE fairs, careers fairs, advisory boards etc.)
- Employer/External Events.
- Tickets/booking management functionality.
- Seating plans/booking seats.
- Electronic registration.
- Self-management of day.
- Record attendance/absence.
- Link enquirer record to event.
- Link event to strategy.
- Sponsorship of events.
- ROI of events.
- Targeted follow up.
- Feedback gathering.
- Survey development and completion.

Careers & placements

- Appointments.
- Mock Interviews.
- Appointment booking.
- Staff availability recording (for appointment booking).
- Front end/portals for students and employers.
- Employer vacancies portal (entered by employer).

Development and alumni

- ‘Rollover’ transfer of student data to alumni status.
- Fundraising financial management – pledges/income against projects/campaigns etc.
- Prospect management – specialised contact management through the fundraising cycle.
- Ability to query on all fields and attributes.
- Tracking volunteering and non-financial support offered and completed.

Communications

- Preference management – constituent facing and back end.
- Record enquiries.
- Record outgoing communications.
- Action timeline.
- Communication schedules.
- Link action to strategy.
- Website and mobile functionality.
- Mass outgoing communications to targeted recipients.
- Meeting reminders.
- Outgoing calls.
- Follow-up campaigns.
- Automatic responses to enquiries.
- Mailmerge functionality for bulk communications.
- Tailored / targeted communications by status.
- Evaluation – open rates, click through, responses generated.

Reporting functionality

- Searchable.
- Track all interactions along the student/company/employer journey.
- Export functionality of data.

- No limit on number of users, enquirers or searches.
- Identify duplicates.
- Record bulk actions.
- Event management reporting.
- Enquiry reporting by demographic data.
- Tracking reports.
- Campaign/strategy reports.
- Outstanding action reports.
- Real-time data.
- Leads by source.
- Leads by offer.
- Contacts by lifecycle stage.
- Unsubscribe rates.
- Click through reports.
- Klout score.
- UTM's.
- Graphical representation of reports.
- Fundraising reporting pledge / income against target.
- Ability to build reports for external requirements e.g. HESA, customers, donors

Systems integration

- SITS.
- Raiser's Edge.
- Keypath.
- Email client (Outlook).
- Bulk email provider.
- Chat.
- Marketing automation.
- Social media management (Hubspot).
- Teams.
- Web analytics.

- Agresso.
- Telephony.
- MS Office applications.
- Target Connect (careers + placements).
- Smarteezie (fundraising campaign telephone software).
- Hubbub (crowdfunding platform).

Submission and review

Your tender return must be submitted via ProContract (see Section 2) and will be evaluated on the responses to each of the questions set out (further content can be attached if you so wish).

If you are selected for presentation / interview then you will be asked to prepare a presentation in a PowerPoint format (covering no more than 10 slides) similar to what is currently described in the tender evaluation questions.

The presentation will be worth 10% of the overall score.

Tender Process

Aston is conducting this procurement under an Open Procedure having advertised a Prior Information Notice (PIN) for 35 days.

Section 2 of this document contains the instructions to Tenderers and the Procurement timetable.

If you wish to respond please submit your response no later than 1.30p.m, 29th January 2021.

The University will review and evaluate all submissions and identify organisations to meet in person / remotely. If successful, you will be invited to present your submission in further detail which will be followed by a discussion and Q&A session. The Presentation will take place on Thursday 25th February 2021 (subject to change).

Duration

Aston anticipates that the work would be completed over a period of time commencing March 2021, with Phase 1 completed by October 2021 and Bidders should set out how the work will be completed within this timeframe, considering that time is of the essence. The contract will be established for an initial period of 3 years with an option to extend for a further period or periods on a non-exclusive call off contract basis enabling the University to engage the nominated supplier for this and other projects in a Microsoft Dynamics Platform. The contract is intended to start on 13th March 2021 or as otherwise agreed.

Any subsequent extension to the contract will be agreed between Aston and the Supplier. It is likely that Aston will seek the Supplier to demonstrate improvements and/or price reductions before considering an extension. For any extension(s) to the contract, discussions

with the Supplier shall be conducted sufficiently far in advance of the contract expiry date to arrive at an agreed position.

Contract Management

The contract will be managed by Paul John – Director of Process and Quality Improvement and Gary Hughes – Executive Director of Marketing and Communications, with review meetings being held on a monthly basis. The review meetings will enable Aston and the Supplier to review performance of the contract, discussing matters which may include but not be limited to;

- Feedback from key stakeholders;
- Discussion regarding any complaints of poor performance and agreement of actions to address;
- Consideration of any improvements or developments;
- Any changes in key personnel, processes, or delivery; [and]
- Progress of the development of CRM solution and implementation of the solution against the project plan forming part of the contract.

The Supplier will be expected to field the appropriate personnel to a review meeting accordingly.

In addition to contract management responsibilities, the successful supplier will be working with a combination of full and part time resources assigned to the project. We envisage that this will include:

- i) a full time Project Manager from the Project Management Office;
- ii) a combination of full and part time resources from the teams in scope e.g. marketing, recruitment and admissions;
- iii) Dynamics developers from the Digital Services team;
- iv) Senior input as and when required from functional leads and technical experts.

Management Information

The Supplier shall provide management information on a periodic basis relative to all activity undertaken by the Supplier as requested by Aston.

The content and frequency of management information will be agreed with Aston at the commencement of the contract or during the mobilisation period of the contract.

Management information will be presented in a format which can be exported into MS Office Applications or other similar packages used by the Customer that can be used to manipulate data.

2 GENERAL CONDITIONS

Instructions

All required responses must be submitted in accordance with the following instructions. We may reject applications not complying with these instructions.

These instructions are designed to ensure that all Tenderers are given equal and fair consideration. It is important that you provide all the information requested in the format and order specified. Please contact the Procurement Team if you have any doubt as to what is required or that you will have difficulty in providing the information requested.

- Your completed response will be treated as part of your expression of interest. In order for your tender to be considered, you must ensure that you have read all instructions provided via ProContract and return all required documents by the due date and time as indicated by ProContract.
- For technical support in relation to ProContract please contact the help desk on support@due-north.com or <http://ProContract.kayako.com/suppliernetwork/Core/Default/Index>.
- Do not alter the original file format of any documentation sent out as part of this procurement exercise.
- Ensure you answer the questions within the portal unless directed otherwise. Responses which are detailed in an attachment without being instructed to do so, will be considered as non-compliant.
- All attachments if required should be cross referenced; noting the question number the attachment relates too i.e. *[ref no/ Suppliers name/question number]* (limit of 50 characters including spaces) and must be in a Microsoft Office or PDF format as we are unable to open other formats. Anything that is submitted in a non-supported format may not be considered.
- The evaluation team reserves the right to seek further information to support the information in the form of clarification questions which will be issued via ProContract.
- Please note that this will be an electronic evaluation and adjudication based on the responses provided, it is imperative that you complete all of the sections as fully and in as concise a manner as possible. If you do not complete all sections, or do not provide appropriate supporting evidence and information, your application may be disqualified or your overall rating following adjudication may be adversely affected.
- It is in your interest to ensure that adequate, appropriate responses are made to each section of the questionnaire, and that adequate and appropriate supporting evidence is provided.
- Do not leave any questions unanswered; otherwise they will be given a zero mark and may result in your application being excluded from the process.
- Any questions answered incompletely because the information is 'not available' or is 'confidential' may be given a zero mark and may result in your submission being excluded from the process.

- A fail score on one or more criterion may result in the disqualification of the tender.
- Please ensure all documents requested are enclosed with your response otherwise you will be given a zero mark that may result in your submission being excluded from the process.
- Please answer the questions specifically for your organisation only and NOT for any group (given you are part of a group of companies). Where you are submitting details covering a consortium bid, you should make clear where and how your submission relates to individual consortium members.
- All documentation will be issued, and the responses received using our e-tender web portal (ProContract): <https://Procontract.due-north.com/SupplierPreLoginHome>.
- Responses are to be received via ProContract web portal. If you are unable to submit your response, please contact Aston via the messaging function of ProContract portal or contact the ProContract support desk, immediately. We are unable to accept late responses once we have opened tender responses.
- All details within your response and any further documentation supplied as a result of applying for a project must be treated as private and confidential and thus shall not be disclosed to any party, whether your application is successful or not.
- It is a Tenderers responsibility to ensure that you download and review all of the documents available for the project on ProContract. Please inform Procurement if you are unable to access any documentation via the messaging function of ProContract.
- All communication relating to the requirements must be forwarded in writing, to the Procurement Team through the messaging function of ProContract.
- You should make yourself aware of the specific requirements of the procurement exercise and of the goods, works or services to be provided. All enquiries relating to this project must be made to the Procurement Team not less than **9 days** prior to the specified date for the return of application. If the answer to a question raised alters or supplements the basis for the proposals, then the relevant document will be revised and issued to all companies. Aston reserves the right to amend the enclosed documentation at any time prior to the deadline for receipt of tenders. Any such amendments will be issued to all Tenderers. Where amendments are significant Aston may, at its discretion extend the deadline for receipt.
- Returns submitted must be in strict accordance with the Project Documentation. The applicant may not alter the documents in anyway including re-formatting. Responses should not be annotated in an attachment unless directed to do so. Should you discover any discrepancies therein or be in any doubt as to the meaning thereof, you should notify the Procurement Team through the messaging function of ProContract.
- No response or any part of a return shall be deemed to have been accepted unless such acceptance shall have been notified to the Tenderer by notice in writing by Aston.
- An anonymised copy of all questions and answers raised will be maintained and distributed periodically to all recipients of the invitation to tender. If the tenderer expresses that the question is confidential and Aston agree that it is, then the response will be sent only to the tenderer raising the question.
- The Supplier must on no account contact or communicate with any other person involved in work concerning this project before the closing date unless Aston redirects the enquiry to an authorised person for response.

- Where Aston discovers any errors or omissions in your return, this will be pointed out and you will be given the opportunity to confirm the information. Your decision and any subsequent correction must be confirmed in writing and submitted through the messaging function within ProContract. Aston reserves the right to disqualify incomplete returns.
- The Tenderer warrants that the prices in the return have been arrived at independently, without any consultation, communication, agreement or understanding, either for the purpose of restricting competition or on any matter relating to such prices, with any other Tenderer / Supplier or with any competitor and prices are fully inclusive to meet the requirements of the project. To this effect, please complete and return the pricing details as detailed within with your submission.
- Gathering all necessary information for the preparation of the response will be the Tenderers own responsibility and must be done at their own expense. Any information provided is supplied only for general guidance in the preparation of the response. Tenderers must satisfy themselves by their own investigations about the sufficiency of information and no responsibility is accepted by Aston for any loss, damage or expense of whatever kind arising from the use by Tenderers of such information.
- Aston does not bind itself to accept the lowest or any tender, and unless a tenderer expressly states that a partial award will not be acceptable, then the right is reserved to accept a tender in part.
- Offers made subject to additional or alternative conditions may be rejected on the grounds of such conditions alone.
- Your response must be uploaded to the Aston e-tendering portal no later than **1.30p.m, Friday 29th January 2021**. ProContract will allow bid submissions after the time and date stipulated on the timescales, however your response will be recorded and flagged as being late and a decision will be taken whether or not to accept the bid.
- Please note that uploading your tender return will take time and Tenderers should ensure they allow sufficient time before the tender is due to close to upload their documents.
- Aston University will not accept liability for any tenders that are not uploaded by the due time and date.
- Your response must be in the English language.

Tender Stages

- This tender exercise will be conducted as a one stage procurement process;

Please be aware that the project may be part funded by the European Regional Development Fund.

Procurement Timetable

Timings provided are approximate and may be subject to amendment, notification of any changes to timing will be provide via the ProContract Portal.

Procurement Process	Date
Invitation to Apply	Friday 15 th January 2021
Final Date for Clarifications	Wednesday 20 th January 2021
Closing date for Returns	Friday 29 th January 2021
Evaluation Period	Friday 29 th January 2021 – Friday 12 th February 2021
Interview / Presentation	w/c Monday 22 nd February 2021
Recommendation Approval	Friday 26 th February 2021
Suppliers notified of Outcome	w/c Monday 1 st March 2021
Stand still period	Monday 1 st March 2021 – Thursday 11 th March 2021

2 TERMS AND CONDITIONS

- Aston intend to contract using Aston's Terms and Conditions 'OGC 056A Purchase of Services Agreement.
- Tenderers will be required to review and agree to Aston Terms and Conditions. Tenderers may suggest amendments or detail their level of non-compliance; however all amendments will be scored and the Aston reserves the right to nullify all other scores and exclude a tenderer if in its view the level of non-compliance with the Terms and Conditions is considered too high or is unacceptable to the University.

3 EVALUTION OF TENDERS

All completed tenders received will be evaluated by officers of Aston (as appropriate) or appointed representatives of Aston as required.

In order to be transparent, and in order that Tenderers fully understand how their tender submission will be evaluated, full details of the evaluation process are described below. Should any tenderer not understand any element, they should in first instance make contact with Aston via the ProContract portal.

The following price and quality weightings will be used to determine the most economically advantageous tender:

The methodology for evaluating tender submissions against these criteria is as follows:

Quality

- Non-price accounts for 80% of the total tender score. Tenderers will be asked to provide a response to the qualitative section in ProContract.
- All qualitative question weighting are stated in the questionnaire on the ProContract portal.
- When completing the tender questions Tenderers must make sure that they answer what is being asked. Anything that is not directly relevant to the particular question should not be included, but wherever possible Tenderers should demonstrate how they will go further than what is being asked for, to add value.
- Tenderers should also make sure that their answers inform not just what they will do, but how they will do it, and what their proposed timescales are (as relevant). It is useful to give examples or provide evidence to support your responses. The purpose should be to include as much relevant detail as required, so that the evaluation panel gets the fullest possible picture.

Evaluation Criteria

All method statement responses and qualitative scoring areas will be assessed on a scale of 0 to 10 points, as detailed in the table below:

Score	Performance
10	Excellent - Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full.
8	Good - Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled.
6	Acceptable - Response is relevant and acceptable. The response addresses a broad understanding of the requirement but lacks details on how the requirement will be fulfilled.
4	Poor - Response is relevant and poor. The response addresses some understanding of the requirement but contains limited detail and limited explanation to demonstrate how the requirement will be fulfilled.
2	Doubtful : Response is partially relevant. The response demonstrates some understanding of the requirement but contains insufficient or no explanation to demonstrate how the requirement will be fulfilled.
0	Unacceptable - Nil or inadequate response. Fails to demonstrate an ability to meet the requirement

- Any tender responses which receive a score of 2 or lower may result in the submission being deemed non-compliant.
- A "fail" score on one criterion could result in disqualification of the tender.
- Aston does not bind itself to accept the lowest or any tender for the goods, services or works. Aston will have no obligation to Tenderers arising from this process unless and until it enters into a formal contract with the chosen Supplier(s) for the provision of the goods/services/works that are subject to this process.

- Aston will award the contract on the basis of the return that is most economically advantageous to Aston. Account will be taken of any factors which impact on the Tenderers suitability that emerge from the process and relate to information previously provided by the Tenderer. Aston reserves the right to award to one or more of the Tenderers if required.
- Aston reserves the right not to award a project to the winning tenderer if it has concerns as to that tenderers overall workload with Aston and its ability to resource and deliver the project.
- Aston reserves the right not to award to the winning tenderer where it fails a final financial assessment prior to award using information gathered from Creditsafe and our financial calculator.
- Aston cannot guarantee the amount of goods/services/works that it purchases via this agreement. Aston retain the right to use alternative Suppliers if required.

Price

- Tenderers will be asked to provide a response to the price section in ProContract Aston will calculate the costs based on the basket of goods/services identified in the 'Pricing Schedule'. Tenderers are requested to use the pricing schedule provided.
- Price scores will be calculated based on the lowest total cost submitted by Tenderers for the basket of goods/ schedule of services receiving the maximum percentage score.
- The tenderer with the lowest total cost will be awarded the full amount of points available; with the remaining Tenderers gaining pro-rated scores in relation to how much higher their total cost is when compared to the lowest total cost.
- A score of 20% of total available marks will be awarded for the 'price' element of the evaluation:

Worked Example:

Tenderer	Total Cost	Formula = (Lowest total cost / Tenderers total cost) x financial weighting	Price Score
A	£40,000	= £40,000 / £40,000 x 20	20
B	£80,000	= £40,000 / £80,000 x 20	10
C	£100,000	= £40,000 / £100,000 x 20	8

- Any tender that is found to be too low to be credible will be excluded from further consideration. In this instance, Aston will initially clarify with the Tenderer whether the pricing is correct and has been interpreted correctly. As part of the clarification, evidence will be required to demonstrate that the charges are accurate, achievable and sustainable. If following the clarification, any charge is found to be abnormally low, then that tender will be rejected in accordance with the Public Contract Regulations 2015 regardless of how many points it scores in all other aspects.
- Following the evaluation of the written tenders, Tenderers may be invited to attend an interview with the evaluation panel (which may include making a short presentation). The purpose of the interview, should it take place, is to moderate the scores awarded

to the written tender, and to clarify any outstanding issues. No additional points have been reserved for this stage.

- Aston will be invite successful suppliers to deliver a presentation to be held on Thursday 25th February 2021(subject to change). The exact time will be shared with invited bidders once known, so please keep this day available for your team. The presentation will be based on your submission (this includes the quality of the team, their ability to deliver Aston's requirements and their ability to work with Aston will be the deciding factors of this element and your responses to questions raised at the time.
- The presentation will be worth 10% of the overall score.

Pricing

- **Tender Offer** - Unless otherwise stated by the tenderer, tenders shall remain valid for one hundred and twenty (120) days from the closing date for receipt of tenders. A tender valid for a shorter period may be rejected by Aston.
- **Price Review** - All tender prices should remain fixed for the initial duration of the contract. Any price increases must be submitted in writing at least 3 months prior to the anniversary of the contract. Submission of a price increase does not constitute automatic acceptance of the request and Aston reserves the right to review your request. You may be requested to provide further details to support your request.
- Any increases must not be above the appropriate CPI price index.
- **Value Added Tax** - The prices contained herein shall exclude Value Added Tax, which shall be chargeable, where appropriate, in accordance with Government legislation.
- Tenderers must include a percentage breakdown of the 3 largest elements of costs related to the tender.
- Aston payment terms are 30days from date of an accurate invoice, all invoices must include an Aston purchase order number.

5 AGREEMENT

- Any Agreement which may result from this process will be based upon the detailed functional service specification and further information, your response, the proposed form of agreement and any changes which may be agreed in writing following post-tender clarification which, taken as a whole, shall comprise "the Agreement".
- Please be aware that the project may be part funded by the European Regional Development Fund.
- Unsuccessful Companies will be given written feedback via the ProContract portal.

6 FREEDOM OF INFORMATION ACT

- This invitation to tender is made available on condition that its contents (including the fact that the tenderer has received this invitation to tender) is kept confidential by the tenderer and is not copied, reproduced, distributed or passed to any other person at any time, except for the purpose of enabling the tenderer to submit a tender.

564 – Customer Relationship Management System (CRMS)

- Aston has a legal obligation to comply with the provisions of the Freedom of Information Act 2000 (“FoIA”) and Environmental Information Regulations 2004 (the “EIRs”). Accordingly, all information submitted to a public authority may need to be disclosed by the public authority in response to a request under the Act. Aston may also decide to include certain information in any publication scheme that Aston is required to maintain under the FoIA and the EIRs.
- If a Supplier considers that any of the information included in its tender response is commercially sensitive, it should identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity.
- Suppliers should be aware that, even where it has indicated that information is commercially sensitive, Aston might be required to disclose it under the FoIA or the EIRs if a request is received. Should that be the case Aston will contact yourselves in the first instance.
- Suppliers should be aware that, in compliance with its transparency obligations, Aston is required to publish details of its contract(s), including the contract values and the identities of its service providers on its website and on Central Government websites.

7 DOCUMENTS

The following documents are included in the tender pack available via the Proactis portal.

- 564 – CRM Supplier Guidance
- 564 – CRM Pricing Schedule
- T’s & C’s Non-Compliance Submission
- Aston’s Purchase of Services Agreement

USEFUL LINKS

Aston University Home Page

www.aston.ac.uk

Aston University Overview and History:

<http://www1.aston.ac.uk/about/>

Aston Strategy:

<https://www2.aston.ac.uk/about/documents/Aston%20University%20Strategy%202018.pdf>

Equality & Diversity:

<https://www2.aston.ac.uk/staff-public/hr/policies/equality>

Safety and Security

<http://www1.aston.ac.uk/about/security/>

[Vehicles accessing pedestrian & Parking Areas](#)



POLICY ON THE
CONTROL OF VEHIC

Environment and Sustainability:

<https://www2.aston.ac.uk/environment>

Freedom of Information Act

<https://www2.aston.ac.uk/about/management-structure/policies-and-regulations/freedom-of-information-foi>

ProContract.

<https://procontract.due-north.com/Register>