



INVITATION TO TENDER

Closed Framework for Research and Evaluation Services
2025-000007

OPEN PROCEDURE UNDER THE PROCUREMENT ACT 2023

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SECTION 1 – DEADLINE FOR RESPONDING TO THIS DOCUMENT

1 DEADLINE

- 1.1 The deadline for responding to this **Closed Framework for Research and Evaluation Services** is 12pm 23 January 2026 (the “**Tender Return Deadline**”). See Section 6 (Procurement Timetable) and Section 8 (How to respond to this opportunity) of this ITT for further information.

SECTION 2 – INTRODUCTION

- 1.1 The Armed Forces Covenant Fund Trustee Limited acting as trustee of the Armed Forces Covenant Fund (“**the Trust**”) is running a procurement process to establish a closed framework of suitably qualified Suppliers for the provision of research and evaluation services to support the Trust’s research, evidence, policy, and decision-making needs. This Procurement is being conducted in accordance with the Act using the Open Procedure. This document, including its associated annexes/appendices, (together the “**ITT**”) describes how the Procurement will be conducted, including details of the Procurement timetable, participation and award criteria and how to respond to this opportunity. Suppliers are strongly encouraged to read this document before preparing their submission.
- 1.2 The Procurement is being carried out under the open procedure, subject to the Procurement Act 2023 (the “**Act**”).
- 1.3 This document has been prepared to assist Suppliers in deciding whether to participate in and subsequently submit a tender in this Procurement. It is being made available by the Trust on the condition that it is used only in connection this Procurement and for no other purpose.
- 1.4 Please read this document carefully and ensure compliance (including but without limitation the Procurement terms and conditions contained in Appendix A), as failure to comply with this document may result in exclusion from the Procurement and/or the rejection of any submission.
- 1.5 This document should be read in conjunction with the Tender Notice and any associated Procurement documents which have been made available at this stage of the Procurement, as well as any instructions on the Central Digital Platform.
- 1.6 The Trust reserves the right to amend this ITT before the Tender Return Deadline as and when the need arises, including as the result of questions received from any of the Suppliers pursuant to these instructions, or to reflect any other changes to the Procurement or new information. Such amendment may be to any of the terms of this Procurement, including the stated award criteria. Any such amendment will be numbered, dated and issued to all Suppliers. In the event of amendment, the Trust may at its discretion extend the deadline for receipt of Tenders.
- 1.7 Common terms and expressions shall have the meanings ascribed to them in the Glossary in Appendix D.
- 1.8 All references to a ‘section’, ‘paragraph’, ‘appendix’ or ‘annex’ are to a paragraph, appendix or annex of this document unless otherwise stated.
- 1.9 All references to dates and times within this document shall be interpreted in accordance with the United Kingdom time zones applicable at the date of the Procurement (i.e. GMT/BST).

SECTION 3 – INTRODUCTION TO THE TRUST

- 1.1 The Armed Forces Covenant Fund Trustee Limited is a trustee of the Trust. The Trust awards grants that support the Armed Forces community and is both a charity and a Non-Departmental Public Body, or NDPB. The Trust was originally based within the Ministry of Defence before becoming an independent body in 2018.
- 1.2 The Trust has four broad funding themes now and in future years:
 - (a) Non-core healthcare services for veterans;
 - (b) Removing barriers to family life;
 - (c) Extra support, both in and after Service, for those that need help; and
 - (d) Measures to integrate military and civilian communities and allow the armed forces community to participate as citizens.
- 1.3 The Armed Forces Covenant is a promise by the nation ensuring that those who serve or who have served in the Armed Forces, and their families, are treated fairly. It can be signed by businesses, charitable organisations, local authorities, public sector organisations and single services within the Armed Forces. All grants awarded by the Trust support the values of the Covenant and the Trust strongly encourages the projects that it supports to consider if they could sign the Covenant.

SECTION 4 – OVERVIEW OF THE TRUST’S REQUIREMENT

- 1.1 The Trust is seeking to procure suitable Suppliers (each an individual organisation or a consortium with a lead Supplier) to enter into a framework agreement to provide research and evaluation services to the Trust. The definitive statement of the Trust’s requirements is set out in the Service Specification (Appendix B).
- 1.2 This Procurement will establish a framework for research and evaluation services in accordance with section 45 of the Act. A framework is an agreement with selected suppliers which sets out the terms and conditions (including pricing and service levels) under which specific contracts (known as “Call-Offs”) can be awarded during the framework’s duration. The Trust does not guarantee any minimum value of work under the framework. Specific work packages will be awarded via either direct award or mini-competition, depending on the circumstances and as described below. The award of the framework does not confer any right of exclusivity on the Suppliers. The Trust reserves the right, at its sole discretion, to procure the same or similar goods and/or services from other suppliers outside of the framework at any time.
- 1.3 The Trust intends to appoint up to a maximum of five (5) Suppliers. However, where the submitted tenders demonstrate that full coverage of the requirements can be achieved with fewer Suppliers than the maximum number stated in this paragraph, the Trust reserves the right to appoint fewer than the stated maximum number of Suppliers. The Trust will make the decision factoring in issues such as coverage of requirements, the need for consistency in service delivery, supplier capacity risk and effective framework management. The Trust also reserves the right to appoint fewer than the maximum number of Suppliers if fewer than five (5) compliant Tender Responses are received.
- 1.4 The term of the framework is four (4) years.
- 1.5 Individual Call-Off contracts are estimated to range from £40,000 to £200,000 but the Trust reserves the right to award Call-Off contracts under the framework with a value outside of this range.

Call-Off Mechanism and Award Process

- 1.6 Call-Off contracts under the framework will be awarded, by default, by ‘mini-competitions’ based on the following criteria:
 - The experience and expertise of the bidding organisation and the proposed team in relation to the Service requirements.
 - The suitability, deliverability and robustness of the methodological framework proposed to undertake the research or evaluation, and the strength of the project management framework.
 - Consideration of factors including risk management, adherence to relevant professional standards, research ethics principles, data protection legislation and safeguarding requirements.
 - The proposed cost for carrying out the work in the Service Specification outlined in the Call-Off – the lowest bidder receives the highest score in the Commercial section
- 1.7 The process for mini-competitions will involve:
 - Issuing a Call-Off request setting out the scope of services, deliverables, timescales and the precise research and evaluation criteria to be applied to award the Call-Off contract.
 - Allowing framework Suppliers a reasonable period to respond, proportionate to the complexity of the requirement.

- Evaluating responses and awarding the Call-Off contract to the Supplier whose submission offers the most advantageous tender based on the published criteria.

1.8 The Trust reserves the right to award Call-Off contracts via direct award (i.e. without a mini-competition) by approaching a single framework Supplier for a proposal. The Trust may use the direct award option for any of the following reasons:

- for urgent requirements;
- where the Call-Off contract is low-value (typically below £50,000 including VAT); or
- where the Trust considers (in its absolute discretion) a direct award to a specific framework Supplier is necessary for the continuation of work for consistency or because the Supplier is the only one that has the experience or expertise required for the Call-Off contract.

1.9 The Trust reserves the right not to award a Call-Off contract after requesting proposal(s) at any time and for any reason including if no submission meets the Trust's requirements.

SECTION 5 – THE PROCUREMENT PROCESS

This Open Procedure will be conducted as follows:

- 1.1 This Procurement commenced with the issuing of a Tender Notice and the publication of this ITT.

Step 1:

- 1.2 This document includes a procurement specific questionnaire (“**PSQ**”) at Appendix C which all Suppliers are required to complete and include in their Tender Response. Suppliers’ Tender Responses must be returned in accordance with the Procurement Timetable and instructions within this document.
- 1.3 The Trust will first check Suppliers’ Tender Responses to ensure responses are compliant with this ITT. If a Supplier’s Tender Response is non-compliant the Trust reserves the right to reject the Tender Response, and the Supplier will not proceed in this Procurement.

Step 2:

- 1.4 Once the Trust has undertaken a compliance check the Trust will first evaluate Suppliers’ PSQ responses. The Trust will use the PSQ to confirm that neither the Supplier, nor any related persons within its corporate group, Associated Persons relied on to meet the Conditions of Participation, or proposed sub-contractors are listed on the Cabinet Office debarment list. To the extent that any such entities are listed on the debarment list, the Trust will consider whether to exclude the Supplier from participating in the Procurement in accordance with its obligations under the Act.
- 1.5 In addition, the Trust will consider whether any Supplier or related persons within its corporate group, Associated Persons relied on to meet the Conditions of Participation, or proposed sub-contractors are Excluded Suppliers or Excludable Suppliers, and before the Trust determines that a Supplier is an Excluded Suppliers or Excludable Suppliers, it will provide the Supplier reasonable opportunity to make representations and provide evidence as is proportionate in the circumstances. If the Supplier is an Excluded Supplier or Excludable Supplier only by virtue of an Associated Person or proposed sub-contractor, the Trust will notify the Supplier of its intention to exclude the Supplier and provide the Supplier with reasonable opportunity to replace the associated person or sub-contractor. If as a consequence of this process the Trust excludes the Supplier from participating in the Procurement, or is aware of an Associated Person or sub-contractor having been replaced, it will give notice of this fact within 30 days of its decision to the Procurement Review Unit (PRU).
- 1.6 The Trust will also undertake a review of the completed PSQ with reference to any information held on the Central Digital Platform. Responses to any Conditions of Participation will be assessed in accordance with the selection process and any selection criteria as set out in the Tender Notice, PSQ and described in this document.
- 1.7 Suppliers should note that the Trust reserves the right to re-assess any response to the PSQ, in light of any new relevant information that comes to the Trust’s attention. Please refer to the ‘Supplier eligibility’ provisions in Appendix A: Procurement terms and conditions.

Step 3:

- 1.8 Once the Trust has evaluated the PSQ, the Trust will then evaluate the Technical and Commercial envelopes of Suppliers’ Tender responses in order to identify the Suppliers which have submitted the most advantageous tenders in accordance with the assessment methodology and award criteria set out in the Tender Notice and described in this document. In carrying out this assessment, the Trust will disregard any tender from

a Supplier that does not satisfy the Conditions of Participation. The Trust may also disregard a tender:

- (a) from a Supplier that is not a United Kingdom Supplier or a treaty state Supplier or that intends to sub-contract the performance of all or part of the Contract to a Supplier that is not a United Kingdom Supplier or a treaty state Supplier; or
- (b) if the tender breaches a procedural requirement set out in the Tender Notice or associated tender documents; or
- (c) if the tender offers a price that the Trust considers to be abnormally low for the performance of the Contract. Where the Trust considers that a price offered by a Supplier in its tender is abnormally low, the Trust will notify the Supplier and give the Supplier reasonable opportunity to demonstrate that it will be able to perform the contract for the price offered. The Trust will only disregard the tender if the Supplier cannot satisfactorily demonstrate that it will be able to perform the Contract for the price offered.

Step 4:

- 1.9 Once the assessment has concluded, the Trust will provide an assessment summary to all Suppliers whose tenders have been assessed to:
 - (a) inform them whether they have been successful in being awarded the Contract;
 - (b) provide an explanation of the assessment of the Supplier's tender against the relevant award criteria, in accordance with the requirements of the Act; and
 - (c) where different to the Supplier concerned, provide information in respect of the most advantageous tender submitted, including details of the assessment of this tender against the relevant award criteria and the Supplier's name.
- 1.10 Once the assessment summaries have been provided to the Suppliers that submitted final tenders, the Trust will also publish a contract award notice on the Central Digital Platform to commence the mandatory standstill period.
- 1.11 Subject to completion of the mandatory standstill period, the Procurement will end with the Trust entering into the framework agreement with the preferred Suppliers and publication of a Contract Details Notice on the Central Digital Platform. Where appropriate, a copy of the framework agreement may also be published on the Central Digital Platform.

SECTION 6 – PROCUREMENT TIMETABLE

1.1 The timetable for the Procurement is set out in the following table (the “Procurement Timetable”). Deadlines for the submission of responses to the Trust are shown in bold. Failure to meet these deadlines will result in a Supplier’s submission not being considered unless the Trust considers (in its absolute discretion) there are exceptional circumstances outside of the Supplier’s control that have resulted in the Supplier missing a deadline.

Procurement Activity	Date(s) and Time(s)
Issue of ITT to Suppliers	15 December 2025
Deadline for submission of Supplier clarifications	12pm 16 January 2026
Tender Return Deadline	12pm 23 January 2026
Evaluation of tender responses	w/c 26 January 2026
Anticipated date for the Trust to issue assessment summaries to each Supplier that submitted a response to this ITT	w/c 02 February 2026
Anticipated date for the Trust to issue contract award notice	09 February 2026
Standstill period ends	19 February 2026
Contract signature (earliest)	20 February 2026

1.12 The Trust reserves the right, in its absolute discretion, to amend the Procurement Timetable or extend any time period in connection with the Procurement. Any changes to the Procurement Timetable will be notified simultaneously to the Suppliers.

SECTION 7 – CONTRACT TERMS

- 1.1 The framework is expected to start w/c 23 February 2026.
- 1.2 A draft Contract has been provided to Suppliers with this ITT. Suppliers are required to accept the terms of the draft Contract (without amendment) as part of their Tender response (see Section 10 (The assessment process and award criteria)).
- 1.3 Suppliers may propose amendments to the draft Contract only during the clarification period. Suppliers must not provide full mark-ups of the draft Contract. Any proposed amendments to the draft Contract must be submitted through the clarification process (see Section 9 of this ITT). The Trust will review all clarification requests and consider (in its absolute discretion) whether to amend the draft Contract. Where appropriate, the Trust may issue an updated version of the draft Contract to all Suppliers prior to the Tender Return Deadline. The Trust is under no obligation to accept any proposed amendments.

SECTION 8 – HOW TO RESPOND TO THIS OPPORTUNITY

1 GENERAL REQUIREMENTS

- 1.1 Tenders shall be submitted in accordance with the instructions given in this ITT. Tenders not complying with these instructions may be rejected by the Trust at its absolute discretion.
- 1.2 Tenders shall be submitted via tenders@covenantfund.org.uk by answering all of the required questions in this ITT and attaching any necessary documents as instructed. More information on the required form and structure of Tenders is provided alongside the relevant questions in this ITT.
- 1.3 Suppliers are required to keep their Tenders open and valid for the period of time specified in Appendix A (Procurement terms and conditions).
- 1.4 Suppliers are required to provide full answers to all questions, including any requested attachments to make up their Tenders. Full details of the response requirements are included in the table below at paragraph 4.1. All Tenders must be strictly in accordance with the format, structure and other requirements specified in this ITT and must be as clear and concise as possible, noting that this will be the single source of information on which responses will be evaluated.
- 1.5 The information supplied will be checked for completeness and compliance with the instructions before responses are evaluated. The Trust reserves the right to deem a response non-compliant if it is not completed fully, comprehensively and honestly and may be rejected. Suppliers are therefore advised to ensure that all members of the Supplier's team are made fully aware of these instructions.

2 FORMATTING

- 2.1 All Tenders must be submitted:
 - (a) in the English language;
 - (b) up to 12 pages, including attachments
 - (c) typed solely in Arial font size 11 (including any attachments);
 - (d) with all financial information stated in GBP, exclusive of VAT and, where relevant, with total values clearly provided;
 - (e) either in standard Microsoft Office formats (Word, Excel, etc), or PDF only. Non-standard formats may be rendered inaccessible to the Trust for evaluation purposes and will not be reviewed.
 - (f) with accounts for the last two financial years (in addition to the page and attachments allowance)
 - (g) without:
 - (i) embedded files or links (including hyperlinks) to any other documents or web pages etc.;
 - (ii) marketing or promotional material;
 - (iii) additional attachments (except for accounts) or appendixes beyond those permitted by any stated word count or character limits;
 - (iv) caveats or qualifications. Suppliers must therefore ensure any explanatory or descriptive matter does not constitute a qualification to

the Trust's requirements as any Tender deemed to be submitted subject to caveats or qualifications may be deemed non-compliant by the Trust and therefore disqualified from this procurement process;

- (v) assumptions or dependencies (including contractual obligations) on the Trust; or
- (vi) cross-referencing between different elements of the Tender response. Each question response should 'stand-alone' and contain the Supplier's entire response to the relevant question.

- 2.2 Suppliers must not include pricing details in any element of the Tender other than the Commercial submission.
- 2.3 Any annexes or appendices provided as part of a Supplier's response must be clearly marked and identified. Supplementary documentation, which is not clearly identified, or cannot be readily linked to a specific evaluation question, will not be evaluated.

3 SUBMISSION PROCESS

- 3.1 A response to the Procurement Specific Questionnaire (PSQ) must be submitted as part of a Supplier's Tender response in accordance with the instructions in Section 8 (How to respond to this opportunity) of this ITT.
- 3.2 Supporting documents and information required by the Trust as part of the submission, e.g. Mandatory and Discretionary exclusions self-declarations for sub-contractors, must be submitted as separate attachments and be clearly referenced as follows: AFCFT_closed_framework_tender [bidder name].
- 3.3 The Tender Return Deadline is stated in the Procurement Timetable and Tenders will not be accepted after that deadline, unless the Trust considers (in its absolute discretion) there are exceptional circumstances outside of the Supplier's control that have resulted in the Supplier missing the deadline. It is each Supplier's responsibility to ensure that its Tender is submitted in accordance with the instructions set out in this ITT before the Tender Return Deadline.
- 3.4 No subsequent claim for loss as a consequence of a Supplier's failure to comply with the instructions set out in this ITT shall be admitted.
- 3.5 The Trust reserves the right to request information from Suppliers following the Tender Return Deadline for clarification purposes.

4 CONTENT

- 4.1 The following table provides a checklist of all information / documents that must be submitted to submit a compliant Tender.

Document number	Document name
1	PSQ Submission: You must use the template provided at Appendix C
2	Technical Submission: You must respond to all Technical criteria specified in Section 10 (The assessment process and award criteria), referencing the Service Specification as appropriate.
3	Commercial Submission: You must use the Commercial Submission template provided (Rate Card: See Appendix G)
4	Form of tender: See Appendix E

5	Commercially sensitive information: See Appendix F
7	Accounts for the last two financial years

SECTION 9 – REQUESTS FOR CLARIFICATION

1 APPROACH TO CLARIFICATION

- 1.1 All communication during the Procurement must be executed by email to tenders@covenantfund.org.uk and NOT through any other means. Where contact is made repeatedly without using the above email address, the Supplier may be disqualified from this Procurement.
- 1.2 Any requests for clarification relating to the Procurement must be submitted to the above email address, no later than the deadline in the Procurement Timetable to allow the Trust sufficient time to respond prior to the closing date for receipt of submissions. The Trust will endeavour to respond to requests for clarification submitted in accordance with these requirements within a reasonable period to allow Suppliers to take the responses to clarifications into account with completing their Tender response.
- 1.3 The Trust reserves the right not to answer any requests for clarification submitted after the deadline set out in the Procurement Timetable or submitted via any means other than the above email address.
- 1.4 Where the Trust considers any requests for clarification to be relevant to the proper functioning of the Procurement, it will transmit to all other Suppliers (without reference to the identity of the Supplier which submitted the clarification question) the clarification question raised and the Trust's response, with the exception of those deemed confidential as provided below.
- 1.5 If a Supplier considers that its request for clarification should be treated as confidential and not disclosed to other Suppliers, it must communicate this and the reason why to the Trust at the time of the submission of that clarification request. The Trust will advise the Supplier in advance of providing the clarification response if it considers that all or any part of the request for clarification cannot be treated as confidential, and will provide an opportunity for the Supplier to withdraw such aspects of the request for clarification. The Trust's conclusion as to whether a request for clarification contains confidential elements shall be final.
- 1.6 In such circumstances, the Supplier may either submit an amended request for the clarification to be treated as confidential, which would be considered by the Trust in the same manner as the original request, or raise a new request to be treated as a non-confidential request for clarification. Any requests not amended or withdrawn by the Supplier following notification may be circulated to all Suppliers as described above.
- 1.7 Clarification questions and responses will be published on the Trust's website periodically and in a timely manner together with the available ITT document. It is the responsibility of each Supplier to monitor all clarifications issued by the Trust. The Trust accepts no liability for any Supplier's failure to keep abreast of clarifications issued.

SECTION 10 – THE ASSESSMENT PROCESS AND AWARD CRITERIA

2 GENERAL GUIDANCE

- 2.1 The evaluation of Tenders will be carried out in a single stage.
- 2.2 The tender process will be conducted to ensure that Tenders are evaluated fairly to ascertain the most advantageous tenders.
- 2.3 The Trust reserves the right to:
 - require a Supplier to provide additional information supplementing or clarifying any of the information provided in its Tender;
 - seek independent financial, legal, market and internal advice and references to validate any response information provided or to assist in the evaluation process;
 - require references, site visits, demonstrations and/or presentations as the Trust deems appropriate;
 - directly award a contract covering all or part of the Requirement to any Supplier that is not an Excluded Supplier where the Trust does not receive any suitable Tenders; and
 - disregard any tender which breaches a procedural requirement set out in this (or any subsequent) ITT.

3 COMPLIANCE REVIEW

- 3.1 The Trust will check the Tenders for completeness and compliance with the requirements for submission set out in this ITT. In particular, the Compliance Review will check that Suppliers:
 - (a) submitted their Tenders by the relevant Tender Return Deadline specified in the Procurement Timetable;
 - (b) have provided a response to all mandatory questions set out in this ITT; and
 - (c) meet the submission requirements set out in Section 8 (How to respond to this opportunity) of this ITT.

- 3.2 Where, in the opinion of the Trust, a Tender is non-compliant the Trust may reject the Tender and any such Tender will not be evaluated.
- 3.3 All Tenders that are considered to meet the requirements set out above will be evaluated.

4 STEP 1: PSQ (QUALIFICATION ENVELOPE)

- 4.1 The Trust will exclude any Tender from a Supplier that does not satisfy the Conditions of Participation. This includes any Tender that scores a "Fail" score for any of the Pass/Fail questions in the PSQ.
- 4.2 The Trust may disregard a Tender:
 - (a) from a Supplier that is not a United Kingdom Supplier or a treaty state Supplier or that intends to sub-contract the performance of all or part of the Contract to a Supplier that is not a United Kingdom Supplier or a treaty state Supplier;
 - (b) if the Tender breaches a procedural requirement set out in the Tender Notice or this ITT;

- (c) if the Supplier fails to provide a satisfactory response to any question in the Central Digital Platform, PSQ and Conditions of Participation (including inadequately or incorrectly completing a response to any question); or
- (d) the Supplier fails to submit the required information by the Tender Return Deadline.

Excluded Suppliers and Excludable Suppliers

- 4.3 The Trust will first consider, in respect of each Supplier that submitted a Tender, whether the Supplier or any related persons within its corporate group, Associated Persons relied on to meet the Conditions of Participation, or proposed sub-contractors, are an Excluded Supplier or an Excludable Supplier and will consider whether to disregard the Tender submitted in accordance with its obligations under the Act. To the extent that any such entities are listed on the debarment list, the Trust will consider whether to exclude the Supplier from participating in the Procurement in accordance with its obligations under the Act. Before the Trust determines that a Supplier is an Excluded Supplier or an Excludable Supplier, it will provide the Supplier reasonable opportunity to make representations and provide evidence as is proportionate in the circumstances.
- 4.4 If the Supplier is an Excluded Supplier or an Excludable Supplier only by virtue of an Associated Person or proposed sub-contractor, the Trust will notify the Supplier of its intention to disregard its Tender and provide the Supplier with reasonable opportunity to replace the Associated Person or sub-contractor. If as a consequence of this process the Trust disregards a Tender from are an Excluded Supplier or an Excludable Supplier, or is aware of an Associated Person or sub-contractor having been replaced, it will give notice of this fact within 30 days of its decision to the Procurement Review Unit.

Economic and Financial Standing

- 4.5 The Economic and Financial Standing questions 13,14 and 15 of the PSQ are designed to evaluate whether the Supplier has sufficient economic and financial standing to deliver the Contract.
- 4.6 They are assessed on a Pass / Fail basis as follows:
Q13 Yes = Fail; No = Pass
- 4.7 If the Tender response is awarded a “Fail” score, the Tender response will be excluded from the Procurement.

Insurance

- 4.8 The insurance question 15 of the PSQ is assessed on a Pass/Fail basis. Suppliers are required to confirm compliance with the insurance requirements stated in the question by providing an unequivocal “Yes” response. Failure to do so will result in a “Fail” score and the Tender will be excluded from the Procurement.

UK GDPR

- 4.9 The UK GDPR question 17 of the PSQ is assessed on a Pass/Fail basis. The response will be awarded a “Pass” if it provides the Trust with confidence in the Supplier’s ability to deliver the Contract in compliance with UK data protection law and ensuring the protection of the rights of data subjects. Otherwise, the response will “Fail” and the Tender will be excluded from the Procurement.

Technical and Professional Ability

- 4.10 The Technical and Professional Ability question 18 in the PSQ is designed to evaluate the Supplier's technical and professional ability to deliver the Contract. This section is

scored on a "Pass/Fail" basis. The response will be evaluated in accordance with the evaluation criteria in the Table below. If the Tender response is awarded a "Fail" score, the Tender response will be excluded from the Procurement.

Criteria	Score
The Supplier's response fails to give the evaluator any confidence that the Applicant has experience of delivering a similar contract.	Fail
The Supplier provides a response which gives the evaluator confidence that the Supplier has experience of delivering a similar contract.	Pass

4.11 The Trust reserves the right to contact a customer organisation in relation to whom a case study has been given to ask them to complete a reference to verify that the information provided by the Supplier. Suppliers may be required to assist the Trust in taking up a reference and for making sure that the appropriate contact is available and willing to provide a reference.

Sub-contractor management

4.12 The sub-contractor management question 19 of the PSQ is assessed on a Pass/Fail basis. The response will be awarded a "Pass" where either no subcontracting is intended or, where subcontracting is intended, the Supplier's response provides evidence that the Supplier has previously maintained healthy supply chains or otherwise gives the Trust confidence that subcontracting will not give rise to significant concerns in terms of either:

- (a) maintaining the requisite technical and professional ability to deliver the Contract; or
- (b) otherwise affecting the Supplier's ability to deliver the Contract to the requisite standards.

4.13 Otherwise, the response will be awarded a "Fail" and the Tender will be excluded from the Procurement.

Organisational Standards

4.14 The question will be assessed as follows:

According to any criteria outlined in the Service Specification and assessment criteria.

5 STEP 2: TECHNICAL AND COMMERCIAL ENVELOPE

5.1 The Technical and Commercial envelope will be evaluated in accordance with the process set out below. The scores for Technical and Commercial will be aggregated using the weightings displayed in the table set out below to identify the most advantageous tenders. See Section 4 (Overview of the Trust's requirements) of this ITT on the number of Suppliers that will be appointed to the framework:

Section	Question	Weighting (%)
Technical	1. Relevant experience and capabilities. Please set out your organisation's experience of delivering services of the type and scale envisaged under this framework, as outlined in the Service Specification, over the last three years. Provide up to	30%

	three examples of previous relevant projects (you can expand on the examples used in the PSQ or use additional examples).	
	2. Team capacity and specialist expertise. Please provide details of your organisational capacity and key personnel relevant to this framework and the Service Specification. Outline the typical size and composition of your research and evaluation team (roles, FTEs). Provide short profiles of the core team who would lead and deliver work under this framework, highlighting experience with research and evaluation in the armed forces community or similar contexts. Explain how you will ensure continuity of personnel and manage peaks in demand across multiple Call-Offs.	30%
	3. Methodological approach. Describe your organisation's standard approaches to designing impact and economic evaluations of grant-funded programmes, conducting evidence reviews and mapping the needs of specific communities, as outlined in the Service Specification. Explain how you select and justify methods (qualitative, quantitative and mixed methods), ensure data quality, and manage bias and limitations.	10%
	4. Quality assurance. Provide an overview of your internal quality assurance processes for research and evaluation outputs (e.g. peer review, sign-off).	10%
	5. Engagement, ethics and safeguarding. Describe your approach to engaging with members of the armed forces community in research and evaluation activities, including veterans, serving personnel, families and other groups who may be vulnerable or have experienced trauma. Explain your arrangements for research ethics, informed consent, confidentiality, data protection, and safeguarding, including how you would manage distress or risk during fieldwork. Provide examples of how you have adapted methods to be inclusive and safe for participants.	10%
Technical total		90%
Legal	Bidder confirms that it will agree to the terms of the Contract without amendment.	Pass/Fail
Commercial	Commercial evaluation	10%
TOTAL		100%

5.2 The most advantageous tenders are the Tenders that the Trust considers:

- (c) satisfies the Trust's requirements; and
- (d) receive the highest scores against the award criteria.

5.3 Suppliers should note that:

- (e) where appropriate, the Trust may issue further clarification questions to a Supplier for information that is required to reach a final score;

(f) Suppliers should ensure that their responses to each element of the evaluation are self-contained and do not cross-refer to other elements of their Tender; and

5.4 The final score awarded to a Supplier will be the sum of the Supplier's Technical Total score plus the Commercial Total score.

Technical evaluation

5.5 The Technical Evaluation places emphasis on the degree of confidence the evaluation team has in the Technical Response provided and the extent to which the Supplier has demonstrated the effective delivery of the outputs and requirements set out in the Service Specification.

5.6 The Trust has allocated 90% to the overall marks available for the Technical Envelope. The score given to the response of each criterion will be multiplied by the weighting corresponding to that criterion. The multiplication will result in the final score the Supplier receives for each criterion. The scores for all technical criteria will then be added together to result in a Technical Total.

5.7 The following scoring criteria will be applied:

Score	Definition	Benchmark
		In the opinion of the evaluators, the Supplier's response provides information which:
4	Excellent	<ul style="list-style-type: none"> • Addresses all aspects of the Requirements of the Questions; and • Provides a complete and clear methodology, relevant supporting information and service levels each of which do not contain any substantive weaknesses; and • Provides complete confidence in the Supplier's proposed delivery of the Requirement.
3	Good	<ul style="list-style-type: none"> • Addresses all aspects of the Requirements of the Question; and • Provides a clear methodology and relevant supporting information, but contains minor weaknesses; and • Provides confidence in the Supplier's proposed delivery of the Requirement, with no more than minor reservations.
2	Moderate	<ul style="list-style-type: none"> • Addresses almost all aspects of the Requirement of the Question; and/or • Provides a methodology and supporting information that contains no more than moderate weaknesses; and • Provides a moderate level of confidence in the Supplier's proposed delivery of the Requirement, with no more than moderate reservations.
1	Weak	<ul style="list-style-type: none"> • Partially addresses the Requirement of the Question; and/or • Provides a methodology and supporting information that are of limited or no relevance, or contain significant weaknesses; and/or

Score	Definition	Benchmark
		In the opinion of the evaluators, the Supplier's response provides information which:
		<ul style="list-style-type: none"> The evaluators have significant reservations regarding the Supplier's proposed delivery of the Requirement.
0	Unacceptable	<ul style="list-style-type: none"> No response or the response does not give the evaluators any confidence in the Supplier's proposed delivery of the Requirement.

5.8 Each sub-criterion will be evaluated separately. For each question, the Supplier shall be awarded a score out of 0-4. The evaluators reserve the right to award scores between whole numbers (e.g., 2.5 or 3.8). The weighted score for each sub-criterion shall be calculated so that:

For a score of 0 – the question weighting is multiplied by 0%

For a score of 1 – the question weighting is multiplied by 25%

For a score of 2 – the question weighting is multiplied by 50%

For a score of 3 – the question weighting is multiplied by 75%

For a score of 4 – the question weighting is multiplied by 100%

Worked example: if a question weighting is 7% and a score of 2 is awarded:

$$7 \times 50\% = 3.5$$

The Supplier will score 3.5 for its response to the question.

Responses to all questions are mandatory unless otherwise stated.

Commercial Evaluation

5.9 The Trust is establishing a multi-supplier Framework Agreement for research, evaluation and evidence services. At this stage there is no single defined project or Call-Off contract; the nature, size and duration of future Call-Offs will vary over the life of the Framework.

5.10 In this context, it is not appropriate or practicable to evaluate price on the basis of a fixed total project cost. Instead, the Trust will assess bidders' commercial offers using a day rate method, under which:

- Bidders submit fully inclusive day rates for a standard set of roles/grades in the Rate Card (Annex G), multiplied by a set number of days representing time spent on a hypothetical project
- The Trust will use the average cost across the team for each bidder as the amount to be scored in the Commercial section

5.11 This approach is intended to:

- Enable a fair and transparent comparison of tenders on a like-for-like basis

- Reflect the fact that future Call-Offs will involve different mixes of roles and durations
- Ensure that Framework rates are competitive and represent value for money for the Trust

5.12 The Rate Card provided at Appendix G must be completed as requested. Not all roles will be applicable for every bidder/team. Not completing the Commercial criterial will mean that the bidder would lose up to 10% of the total score available during assessment, and your bid may be excluded as non-compliant. At its sole discretion the Trust may clarify any discrepancies with Suppliers.

5.13 All prices must be submitted in £GBP (excluding VAT, if any).

5.14 The Rate Card calculates the day rates for each member of the team across a total number of days working on a hypothetical project. As not all of these roles will be relevant for every bidder, the average cost across the team (total overall cost ÷ number of members in the team) will be used to score the commercial criteria.

5.15 The commercial evaluation team will apply the following mathematical formulae to the Commercial Criteria then sum these to calculate the overall commercial total score.

[Price Element Score] =

(Lowest Bidder's Average Cost) / (Bidder's Average Cost)

X [Average Cost Weighting]

For example, if Bidder A's Average Cost is £10,000, which is the lowest Bidder Average Cost, and Bidder B's Average Cost is £20,000 and Average Cost (Commercial) has a weighting of 10%:

(a) Bidder A scores 10%; and

(b) Bidder B scores 5%, being

(10,000 / 20,000) X 10 = 5

5.16 If a Tender, or an element of the Tender, includes costings that the Trust considers to be abnormally low, the Trust shall notify the Supplier that the Trust considers the costings to be abnormally low, and give the Supplier reasonable opportunity to demonstrate that it will be able to perform any future Call-Offs for the rates provided. Should the evidence supplied in response to this request fail to demonstrate to the Trust's satisfaction that the Supplier is expected to be able to perform future Call-Offs for the rates offered, the Trust may disregard the Tender for being abnormally low and disqualify the Supplier from the Procurement.

5 CONCLUDING THE EVALUATION

5.1 Following the completion of the evaluation the Trust expects to be able to offer the Contract to the Suppliers who achieve the highest combined Technical and Commercial scores. See Section 4 (Overview of the Trust's requirements) of this ITT on the number of Suppliers that will be appointed to the framework.

5.2 In the event that the highest combined Technical and Commercial Score results in a tie, the Contract will be offered to the Supplier who achieves the highest overall score for Technical questions 1 and 2.

5.3 In the event that a successful Supplier declines to enter into the Contract, the Trust may choose to proceed to Contract award with the next highest scoring Supplier.

APPENDIX A – PROCUREMENT TERMS AND CONDITIONS

Procedural requirements

- 1.1 This document together with all other associated documents provided to Suppliers in connection with this Procurement contain procedural requirements which Suppliers must follow. Failure to comply with or follow any procedural requirement may result in the exclusion of the Supplier from the Procurement at the Trust's sole discretion.

Central Digital Platform

- 1.2 Suppliers that wish to participate in this Procurement are responsible for ensuring that the Central Digital Platform contains complete, accurate and up-to-date information about their organisation and any Associated Suppliers which are relevant for the purposes of this Procurement. Suppliers must notify the Trust immediately if it is unable to register on the Central Digital Platform and/or provide accurate and up-to-date information via the Central Digital Platform.

Transparency

- 1.3 Suppliers should note that, in accordance with general transparency obligations and procurement law obligations under the Act, the Trust routinely publishes details of its procurement processes and awarded contracts. This includes, but is not limited to, the contract value, the identity of the successful Supplier, compliance with payment obligations and contract performance. In certain circumstances this includes information on who has submitted a Tender, even where that Tender has been unsuccessful or where a Supplier has withdrawn from a procurement process. By submitting a Tender you acknowledge the requirements of the Act and consent to the publication of such information about you and your Tender as the Trust considers is necessary to comply with its statutory obligations.
- 1.4 Where required under the Act, a copy of the Contract will be published (subject to making any reasonable and proportionate redactions permitted under the Act).

Modifying and Cancelling the Procurement

- 1.5 Neither the Tender Notice, this document nor any information given as part of the Procurement shall be regarded as a commitment or representation on the part of the Trust (or any other person) to enter into a contractual agreement.
- 1.6 The Trust reserves the right to cancel the Procurement at any point and/or to choose not to award any contract as a result of this Procurement.
- 1.7 Suppliers will remain responsible for all costs and expenses incurred by them, their staff, and their advisers or by any third party acting under their instructions in connection with this Procurement. For the avoidance of doubt, the Trust shall have no liability whatsoever to Suppliers for the costs associated with any amendments, changes, discussions, or communications, regardless of whether a Supplier's Tender is successful or is rejected, nor if the Procurement is terminated without award of a Contract.
- 1.8 The Trust reserves the right to:
 - (a) to issue amendments, modifications or additional information to any documentation which forms part of this Procurement, including the Procurement terms and conditions contained in this Appendix A before the Tender Response Deadline;
 - (b) to require a Supplier to clarify their proposal(s) and/or tender submission in writing and/or provide additional information – failure by a Supplier to respond adequately may result in their tender submission being rejected at any time;

- (c) to alter the Procurement Timetable for this Procurement at any time; and/or
- (d) to rewind and re-run any part of the Procurement on the same or alternative basis at any time.

Option to direct award

1.9 The Trust reserves the right to directly award additional or repeat, goods, works or services in accordance with Schedule 5, paragraph 8 of the Act.

Confidentiality and publicity

1.10 Save to the extent made publicly available by the Trust, the information in this document (together with all attachments and any other information communicated to Suppliers during the Procurement) is made available on the condition that it is treated as confidential information by the Supplier and is not disclosed, copied, reproduced, distributed or passed to any other person at any time except:

- in order to comply with legal obligations; or

(b) for the purpose of enabling a submission to be made to the Trust, in which case the information may only be provided to any other person where that person has given an undertaking prior to the receipt of the relevant information (and for the benefit of the Trust) to keep such information confidential.

1.11 All information and material provided shall be either returned to the Trust or securely destroyed by unsuccessful Suppliers at the conclusion of the Procurement.

1.12 The Trust may disclose Tender information to its officers, employees, agents, professional advisors, or partners for the purposes of conducting this Procurement and (where applicable) management of the Contract. In providing such information the Supplier consents to such disclosure.

1.13 Suppliers must not take part in any publicity activities with any part of the media about this Procurement without obtaining the express prior written agreement of the Trust. When requesting prior written agreement, Suppliers are required to detail the proposed media coverage including format and content of any publicity.

Freedom of information and environmental information

1.14 The Trust is subject to the Freedom of Information Act 2000 (FOIA) and the Environmental Information Regulations 2004 (EIR). All information submitted to the Trust may be disclosed in response to a request made pursuant to the FOIA or the EIR.

1.15 In respect of any information submitted by a Supplier that it considers to be commercially sensitive, the Supplier should:

- clearly identify which information is considered commercially sensitive and complete the table contained within Appendix F;

(b) explain the potential implications of disclosure of such information; and

(c) provide an estimate of the period of time for which the Supplier considers that such information will remain commercially sensitive.

1.16 The Trust will endeavour to:

- hold confidential all information submitted by a Supplier that it identifies as being commercially sensitive; and

- (b) consult with a Supplier about commercially sensitive information before making a decision on any FOIA requests and EIR requests received.

1.17 Suppliers should note, however, that the final decision on any FOIA request and EIR request rests with the Trust, subject to applicable law. Even where information is identified as commercially sensitive, unless an exemption/exception provided for under the FOIA/EIR is applicable, the Trust will be obliged to disclose that information in response to a request. Accordingly, the Trust cannot guarantee that any information marked 'commercially sensitive' will not be disclosed.

Requirements on sub-contractors and consortium

- 1.18 If requested to do so by the Trust, a Supplier will be required to enter into a legal arrangement with other members of a consortium or with any parties which are relied on in order to satisfy the Conditions of Participation relating to this Procurement (in accordance with section 72 of the Act). Tenders submitted by potential consortia must therefore include a "Letter of Intent to form a consortium" in the event of being successful and it must:
 - (a) be signed by a duly authorised representative of each member of the consortium with details of each signatory provided in print below each signature;
 - (b) include an express provision that each member of the consortium is jointly and severally liable in respect of the Supplier's obligations;
 - (c) provide details of the name of the organisation nominated to act as manager of the consortium and who is authorised to act for the consortium in terms of committing it to any obligations and liabilities and to receive and act upon instructions from the Trust and to make and receive payments; and
 - (d) state full details of the proposed structure; the division of technical responsibilities between the partners and intended capitalisation.
- 1.19 Provision of the letter of intent described above shall be considered a mandatory requirement for this Procurement and failure to provide such a letter will result in the Supplier's exclusion from the Procurement.
- 1.20 Where sub-contractors will play a significant role in the delivery of the services or products under a Contract, Suppliers must indicate the composition of the supply chain, indicating which member of the supply chain will be responsible for the elements of the requirement noting that ultimate responsibility will always rest with the prime contractor. For the avoidance of doubt, any sub-contractor relied upon by the Supplier to satisfy the Conditions of Participation will be considered to play a significant role in the delivery of the services or products under any ensuing contract and must be included.
- 1.21 Where the Tender is submitted by a group of economic operators then, in the absence of a consortium agreement, each member of the group of economic operators shall be deemed to be a sub-contractor to the Supplier and shall not be a party to the Contract. The group of economic operators must determine prior to submitting a proposal which of the group will submit on their behalf and be the 'Supplier'.
- 1.22 It is recognised that arrangements in relation to sub-contracting/consortia may (within limits) be subject to future change. Suppliers should therefore respond in the light of the arrangements as currently envisaged. Suppliers should be aware that where sub-contractors are to play a significant role, any changes to those sub-contracting arrangements may affect the ability of the Supplier to proceed in the Procurement process or to provide the goods and/or services. Suppliers are reminded that any future proposed change in relation to consortia must be notified to the Trust so that it can make a further assessment by applying the Conditions of Participation to the new information provided. The Trust may exclude a Supplier in the event that a change to a proposed sub-contractor

or consortium member results in an inability to meet the Conditions of Participation (including where one or more mandatory or discretionary grounds for exclusion is met as a consequence of such change).

Non-collusion, non-canvassing

- 1.23 Any attempt by a Supplier or their advisers to influence the Procurement in any way may result in the exclusion of the Supplier, without prejudice to any other civil or legal remedies available to the Trust and without prejudice to any criminal liability that such conduct by a Supplier may attract.
- 1.24 Specifically, Suppliers must not directly or indirectly at any time:
 - (a) devise or amend the content of their submissions in accordance with any agreement or arrangement with any other person, other than in good faith with a person who is a proposed partner, subcontractor, consortium member insurance provider or provider of finance;
 - (b) enter into any agreement or arrangement with any other person as to the form or content of any other submission or offer to pay any sum of money or valuable consideration to any person to effect changes to the form or content of any other submission;
 - (c) enter into any agreement or arrangement with any other person that has the effect of prohibiting or excluding that person from submitting a response in this Procurement;
 - (d) canvass any employees, members or agents of the Trust in relation to this Procurement;
 - (e) attempt to obtain information from any of the employees, members or agents of the Trust or their advisors concerning another Supplier or submission; and/or
 - (f) carry out any other co-operation or collusion with another Supplier or any other person which the Trust considers capable of undermining fair competition.

Improper behaviour

- 1.25 The Trust reserves the right to disqualify any Supplier from participating in this Procurement where the Trust determines that such Supplier has acted improperly resulting in it gaining an unfair advantage in relation to any award of contract and such unfair advantage cannot be avoided without disqualifying the relevant Supplier.
- 1.26 For these purposes, “acting improperly” includes where the Supplier:
 - fails to provide information requested by the Trust;
 - (b) provides information to the Trust that is incomplete, inaccurate or misleading;
 - (c) accesses confidential information; or
 - (d) unduly influences the Trust’s decision-making.
- 1.27 Prior to any such disqualification, the Trust will notify the Supplier in question of the intention to disqualify and will provide the Supplier with 5 working days (or such other period as the Trust considers reasonable in the circumstances) to make representations and provide relevant evidence as to why the Supplier should not be disqualified. The Trust will consider any such representations and evidence prior to making its final determination.

Conflicts of interest

1.28 Suppliers are responsible for ensuring that no actual, potential or perceived conflicts of interest (within the meaning of the Act) exist between themselves and the Trust or its advisers. A conflict of interest may arise where (for example):

- a Supplier, Consortium member and/or Sub-Contractor has been involved in advising the Trust on matters relating to the Contract or in the preparation of documents or information relating to the Contract; or
- (b) a director, company secretary, or a staff member from a Supplier, Consortium member and/or Sub-Contractor is related to or has a personal interest with a Relevant Staff Member(s) of the Trust. Such a relationship may not create a conflict of interest if it is declared at the earliest possible opportunity and in any event, prior to the submission of the Tender, and can therefore be managed by the Trust in an open and transparent way.

Please note that, in general, involvement of a Supplier in Preliminary Market Engagement carried out by the Trust should not represent a conflict of interest.

1.29 Suppliers must notify the Trust immediately of any circumstances, including personal, financial and business activities that will, or might, give rise to a conflict of interest by taking part in this Procurement or if awarded the Contract. Such disclosure shall also be made in respect of any Consortium members and Sub-Contractors proposed by the Supplier. Where Suppliers identify any potential conflicts of interest, they should state how they intend to address such conflicts of interest.

1.30 In the event of any actual, potential or perceived conflict of interest, the Trust shall in its absolute discretion decide on the appropriate course of action. The Trust reserves the right to:

- exclude any Supplier that fails to notify the Trust of an actual, potential or perceived conflict of interest, or where an actual conflict of interest exists;
- (b) request further information from any Supplier and require any Supplier to take reasonable steps to mitigate a conflict of interest. This may include requiring any Supplier to enter into a specific conflict of interest agreement with the Trust. Failure to do so may result in the Supplier being excluded from participating in, or progressing as part of, the Procurement process; and
- (c) exclude the Supplier from participating in, or progressing as part of, the Procurement process if the Trust considers that an actual, potential or perceived conflict of interest puts a supplier at an unfair advantage in relation to the award of the Contract and either:
 - (i) the advantage cannot be avoided; or
 - (ii) the Supplier will not take steps that the Trust considers necessary in order to not put it at an unfair advantage.

1.31 The Trust strongly encourages Suppliers to contact the Trust as soon as possible should it have any concerns regarding actual, potential or perceived conflicts of interest.

Intellectual property

1.32 Suppliers are reminded that all intellectual property rights, including copyright, in the documents and materials supplied by the Trust and/or its advisers in this Procurement, in whatever format, belong to the Trust, its advisers or the relevant owner/licensor. Suppliers shall not copy, reproduce, distribute or otherwise make available any part of these documents to any third party (except for the purpose of preparing a submission)

without the prior written consent of the Trust. All documentation supplied by the Trust in relation to this Procurement must be returned or destroyed on demand, without any copies being retained by Suppliers.

Anti-competitive behaviour

- 1.33 Suppliers are reminded of their obligations under applicable competition laws. The Trust may require evidence from Suppliers that their arrangements are not anti-competitive and reserves the right to require any Supplier to comply with any reasonable measures which may be needed to verify that no anti-competitive arrangements are in place.
- 1.34 Any evidence of anti-competitive behaviour may result in a Supplier being disqualified from the Procurement. The Trust also reserves the right to refer any suspected breaches of applicable competition laws to the relevant authorities including, but not limited to, the Competition and Markets Authority and the Serious Fraud Office.
- 1.35 Suppliers should note that anti-competitive behaviour may result in the Supplier being excluded from bidding for contracts under Schedule 7, Paragraph 7 of the Act. Where a relevant decision has been made by the Competition and Markets Authority under the Competition Act 1998, the Supplier may also be excluded from bidding for contracts under Schedule 6, paragraph 41 and may be added to the debarment list and/or be liable for civil and/or criminal penalties.

Contract

- 1.36 A tender submission is an offer to enter into a contract on the terms of the contents of the submission. Notification of an award decision does not constitute acceptance by the Trust. Any document submitted by a Supplier shall only have contractual effect when it is contained within an executed written contract.
- 1.37 The Trust shall not be committed to any course of action as a result of (without limitation):
 - issuing this (or any) ITT;
 - (b) communicating with a Supplier or a Supplier's representatives in respect of this Procurement; or
 - (c) any other communication between the Trust (whether directly or by its agents or representatives) and any other party.

Tender validity

- 1.38 The Supplier's Tender response must remain valid for acceptance for a period of 90 days from the date of its submission or until any procurement challenge/s have been resolved.

Supplier withdrawal

- 1.39 Suppliers may withdraw from the Procurement at any time by providing written notification to the Trust.

Supplier eligibility

- 1.40 Suppliers are reminded that the eligibility requirements in this document, Tender Notice and all other associated tender documents apply to the Procurement at all times.
- 1.41 The Trust reserves the right to require any Supplier to provide such further information as the Trust may require (and for the avoidance of doubt, the Trust may make multiple requests) as to any issue addressed in the ITTs, including, but not limited to, the economic and financial standing of the Supplier at any stage of the Procurement and prior to the notification of the award decision and/or the award of the contract.

1.42 Throughout the Procurement process and until the point where any Contract is signed, Suppliers must disclose if there has been:

- any change of circumstance where a change in the structure, control, composition or membership of a Supplier or an organisation that a Supplier has relied upon to meet the Conditions of Participation takes place; or
- (b) any change in the information that the Supplier has provided in its response to this Procurement (including but not limited to arrangements in relation to any Associated Suppliers).

1.43 The Trust must be informed of the change by the Supplier immediately after it occurs and the Trust reserves the right to re-evaluate the relevant Conditions of Participation response and exclude the Supplier where the Conditions of Participation are no longer met at any point prior to signing of a Contract.

1.44 The duty to disclose set out above extends to any company in the same group as the Supplier (including but not limited to parent, subsidiary and sister companies, and companies with common shareholders whether direct or indirect and parties with whom the Supplier is associated in respect of this Tender) where that company has been relied upon in respect of any aspect of the Conditions of Participation.

1.45 Where any change, misconduct or complaint is disclosed or should have been disclosed that may impact the Supplier's Tender, the Trust reserves the right to take such action as it deems appropriate in the light of its assessment of the updated information, including (but not limited to) excluding the Supplier concerned from the Procurement. The Trust may seek additional information from the Supplier or other competent authorities where the Trust deems it necessary to make a decision on eligibility and compliance with this ITT.

Accuracy of information

1.46 This ITT (including all its appendices, attachments and schedules) has been prepared on behalf of the Trust for the sole purpose of enabling Suppliers to submit Tenders. No guarantee can be given however, and no representation is made, as to the accuracy of information contained within it and it is each Supplier's responsibility to obtain for itself at its own expense all information which it deems necessary or desirable for the preparation of its Tender. Neither the Trust nor any of its professional advisers accepts any liability, which might result from any inaccuracy of or omission from any such information.

Supplier warranties

1.47 In responding to this invitation, the Supplier warrants, represents and undertakes to the Trust that:

- it understands and has complied with the conditions set out in this document;
- (b) all information, representations and other matters of fact communicated (whether in writing or otherwise) to the Trust by the Supplier, its staff or agents in connection with or arising out of the Procurement are true, complete and accurate in all respects, both as at the date communicated and as at the date of the submission of the response to this document;
- (c) it has made its own investigations and undertaken its own research and due diligence, and has satisfied itself in respect of all matters (whether actual or contingent) relating to the invitation and has not submitted its response in reliance on any information, representation or assumption which may have been made by or on behalf of the Trust (with the exception of any information which is expressly warranted by the Trust); and

(d) it has full power and authority to respond to this document and to perform the obligations in relation to the contract and will, if requested, promptly produce evidence of such to the Trust.

1.48 Suppliers should note that the potential consequences of providing incomplete, inaccurate or misleading information include that:

- the Trust may exclude the Supplier from participating in this Procurement;
- (b) the Supplier may be excluded from bidding for contracts under Schedule 7, Paragraph 13 of the Act;
- (c) the Trust may rescind any resulting contract under the Misrepresentation Act 1967 and may sue the Supplier for damages; and
- (d) if fraud or fraudulent intent can be proved, the Supplier may be prosecuted and convicted of the offence of fraud by false representation under section 2 of the Fraud Act 2006, which can carry a sentence of up to 10 years or a fine (or both) – if there is a conviction, then the Supplier may be excluded from bidding for contracts under Schedule 6, Paragraph 15 of the Act and may be added to the debarment list.

Third parties

1.49 Nothing in these terms is intended to confer any rights on any third party under the Contracts (Rights of Third Parties) Act 1999. This does not affect any right or remedy of any person which exists or is available apart from that Act.

Applicable law

1.50 The law of England is applicable to this Procurement.

1.51 Suppliers must agree to submit to the exclusive jurisdiction of the Courts of England and Wales in relation to any dispute arising out of or in connection with this Procurement.

APPENDIX B – SERVICE SPECIFICATION

1 BACKGROUND

- 1.1 The Armed Forces Covenant Fund Trust (the Trust) awards grants that support the armed forces community. The Trust is both a charity and a Non-Departmental Public Body (NDPB), delivering high impact grant programmes, including administration of the £10 million Armed Forces Covenant Fund, each year. We also work with HM Government, particularly the MOD and the Office for Veterans' Affairs (OVA), to run other funding programmes that have a positive impact on armed forces communities. These armed forces communities include serving members of the UK armed forces (regulars and reservists) and their families, veterans and their families, and bereaved families and others affected by service. In some of our programmes, the wider community around a base or in an area with an armed forces population can also benefit.
- 1.2 All our grants are awarded through specific programmes. Each programme has an aim, which describes the change that we would like the funded projects to achieve. We develop our funding programmes based on evidence of challenges that people within the armed forces community face, and where we think that funding from us would be able to make a significant difference to the problem. We work with partners in government and in the charity sector to develop our programmes and often run programme consultations.
- 1.3 We've run some significant programmes exploring serious mental ill-health in veterans, and how we might support families and their carers. We have funded programmes that support good mental health and tackle loneliness, and programmes to provide better support to armed forces families. We undertake vital impact work against all of the programmes we administer, looking at the effectiveness of these programmes and the positive changes they have made.
- 1.4 We use research and evidence to support the development of our grant programmes. This includes consultations with the armed forces community and other key stakeholders, research to identify needs and knowledge gaps, and evaluations of our grant programmes to support accountability and drive learning and improvement. We do this work in-house and also commission research and evaluation partners to conduct independent assessments of our programmes and gather robust independent evidence on our behalf.
- 1.5 We commission and deliver research activities to address four main learning needs:
 - (a) understanding existing evidence of need, interventions which currently exist, and their efficacy
 - (b) qualitative understanding of lived experience of a specific issue and any existing third sector response to it, to inform grant programme design (often involving interview, survey, focus group and consultation techniques)
 - (c) deep-dive, quantitative and qualitative evaluation of individual grant programmes, to understand their impact against specified outcomes, inform future phases of that programme or wider grant-making strategy for the Covenant Fund
 - (d) deep-dive, quantitative and qualitative evaluations of multiple programmes, to understand their impact against the Covenant Fund's three-year strategy, report to MOD on the Covenant Fund's overall impact activity and to inform strategy and planning for the Fund's future grant making

2 AIMS AND OBJECTIVES

- 2.1 This Service Specification sets out the requirements for a multi-supplier Framework Agreement (the Framework) for the provision of research, evaluation and evidence services, to support the Trust in grant programme development and similar activities for the benefit of the armed forces community.
- 2.2 The Framework is intended to appoint up to five (5) organisations capable of delivering high-quality research, evaluation and related services. Call-Off Contracts will then be awarded under the Framework for specific projects. Bidders must demonstrate their ability to deliver all core elements of this Service Specification and to respond flexibly to a range of Call-Off requirements over the life of the Framework, which will be for a period of four (4) years.
- 2.3 The overall objectives of this Framework are to:
 - (a) provide the Trust with timely access to high-quality research and evaluation expertise
 - (b) generate robust, credible and actionable evidence on the needs, experiences, outcomes and impacts associated with the armed forces community
 - (c) support the design, monitoring and evaluation of grant programmes and other initiatives
 - (d) identify and map evidence gaps to inform future strategy, policy, commissioning and funding
 - (e) ensure that research and evaluation activities are conducted in a manner that is ethical, safe, trauma-informed, inclusive and respectful of the armed forces community and their circumstances and experiences
- 2.4 Over the life of the Framework, the Trust expects that Call-Off contracts will collectively contribute to: a deeper understanding of what works, for whom and why; improved targeting and design of funding and services; better outcomes for members of the armed forces community.

3 SCOPE OF SERVICES

- 3.1 The Framework covers (but is not limited to) the following categories of service:
 - (a) impact and outcome evaluations of grant funded programmes or specific projects within a programme
 - (b) process and implementation evaluations to understand how and why programmes work in practice, and what can be improved
 - (c) economic evaluations to demonstrate value for investment or other appropriate considerations
 - (d) needs assessments, scoping studies and feasibility studies
 - (e) evidence reviews, rapid reviews and evidence and gap maps
 - (f) mixed-methods research combining qualitative, quantitative and participatory approaches
 - (g) monitoring and evaluation support, including theory of change development, indicator design and data collection frameworks.
 - (h) data analysis and secondary analysis of existing datasets.

- (i) learning partner / critical friend roles, including facilitation of learning activities and communities of practice.
- (j) capacity-building and support for grant holders and other stakeholders in data collection and evaluation approaches as part of programme evaluations (where required).

3.2 Call-Off contracts may be of varying size, duration and value, for example:

- (a) small-scale, rapid research projects (e.g. 6 to 12 weeks)
- (b) medium-scale evaluations or research projects (e.g. 6 to 18 months)
- (c) larger, multi-year research and evaluation programmes (e.g. 2 to 3 years)
- (d) contracts can range from £30,000-£50,000 or £80,000-£120,000, depending on the project and the available budget, but would typically not exceed £200,000 for complex, multi-year programme evaluations

3.3 The Framework may be used for projects relating to any aspect of support for the armed forces community and any area of the Trust's work. Examples include (but are not limited to):

- (a) mental health and wellbeing
- (b) social isolation and loneliness
- (c) transition from service to civilian life
- (d) families, relationships and education, including for children and young people
- (e) Housing, finances and employment
- (f) Inclusion, diversity and experiences of under-represented groups

4 CORE SERVICE REQUIREMENTS

4.1 General requirements

4.1.1 Suppliers must be able to:

- (a) design and deliver robust, proportionate and ethically sound research and evaluation projects
- (b) work effectively with members of the armed forces community, including people who may have experienced trauma, stigma or multiple disadvantage
- (c) communicate findings clearly and accessibly to a range of audiences including veterans, families, delivery partners, policymakers and funders
- (d) operate within agreed timescales and budgets, managing risks proactively
- (e) collaborate constructively with the Trust, other suppliers and stakeholders

4.1.2 All work must comply with relevant professional standards, research ethics principles, data protection legislation and safeguarding requirements (see sections 6 to 9).

4.2 Impact and outcome evaluations

4.2.1 For impact and outcome evaluations of grant programmes and other interventions, suppliers may be required to:

- (a) work with the Trust and delivery partners to develop or clarify a theory of change / logic model
- (b) develop an evaluation framework and evaluation questions aligned with programme objectives
- (c) design and implement appropriate quantitative and/or qualitative methods, which may include: surveys (baseline, follow-up, longitudinal); administrative data analysis; interviews and focus groups; case studies; and comparative or quasi-experimental designs where feasible and proportionate
- (d) collect and manage data in line with ethical and data protection requirements
- (e) analyse and interpret data, clearly identifying outcomes, impacts, limitations and causality where appropriate
- (f) Provide evidence-based conclusions and recommendations for the Trust and other stakeholders (e.g. MOD or OVA)

4.3 Process and implementation evaluations

4.3.1 For process evaluations, suppliers may be required to:

- (a) examine programme design, implementation and fidelity to the intended model
- (b) explore participant and stakeholder experiences
- (c) identify enabling and constraining factors, including contextual influences
- (d) provide practical recommendations to strengthen delivery and scalability

4.4 Economic evaluations

4.4.1 For economic evaluations, suppliers may be required to:

- (a) define and develop appropriate economic metrics and indicators for projects and programmes
- (b) collect data on resource use from appropriate sources such as monitoring data, budgets and financial records
- (c) explore and analyse counterfactual assumptions and economic indicators such as cost-effectiveness, cost-benefit ratios or social return on investment estimates

4.5 Evidence reviews and evidence and gap mapping

4.5.1 For evidence reviews and evidence and gap maps, suppliers may be required to:

- (a) develop and agree review questions and inclusion criteria
- (b) design and execute transparent and reproducible search strategies
- (c) screen and select studies in line with agreed protocols
- (d) extract, summarise and critically appraise evidence quality
- (e) produce evidence maps showing the nature, strength and gaps in the evidence base
- (f) identify implications for policy, practice and future research, including clear articulation of evidence gaps relevant to the armed forces community or the development of the Trust's grant programmes

5 DELIVERABLES

5.1 Specific deliverables for each Call-Off contract will be defined in the relevant Call-Off documentation, but may include:

- (a) inception report, including refined questions, methodology, sampling strategy, ethical and safeguarding considerations and detailed workplan
- (b) data collection tools, such as topic guides, questionnaires, consent forms and templates
- (c) interim and/or formative reports, including emerging findings and learning
- (d) final report setting out background, methods, findings, conclusions and recommendations, including a clear description of limitations and implications
- (e) executive summaries and accessible summaries (e.g. short briefings, slide decks, infographics) tailored to non-technical audiences.
- (f) presentations or workshops to share and discuss findings with the Trust and stakeholders.
- (g) cleaned and anonymised datasets, codebooks and/or analysis syntax where required and lawful.
- (h) learning products, such as evidence briefings, case studies, practice guides or toolkits.

5.2 All written outputs shall be provided in formats agreed with the Trust (e.g. MS Word, PowerPoint, PDF) and to agreed design and accessibility standards.

6 QUALITY STANDARDS AND METHODS

6.1 All services must be delivered in accordance with recognised good practice and standards in research and evaluation, including:

- (a) transparent and justified methodological choices
- (b) appropriate sampling and recruitment
- (c) use of appropriate analytical techniques
- (d) triangulation of data sources where feasible
- (e) clear explanation of limitations and the strength of evidence and findings
- (f) robust internal quality assurance processes

7 WAYS OF WORKING AND COLLABORATION

7.1 Suppliers must:

- (a) work in a collaborative and constructive manner with the Trust, grant partners, other suppliers and stakeholders
- (b) respect and work with the culture, values and lived experience of the armed forces community
- (c) be prepared to co-design elements of projects with members of the armed forces community, where appropriate and proportionate.

- (d) support learning and knowledge exchange where appropriate, as well as producing reports

8 ETHICS, SAFEGUARDING AND INCLUSION

- 8.1 All research and evaluation activities under this Framework must be conducted in accordance with recognised ethical principles, including:
 - (a) respect for persons and communities
 - (b) voluntary and informed consent
 - (c) confidentiality and appropriate anonymity
 - (d) minimisation of harm and distress
 - (e) fairness, equity and inclusion
- 8.2 Suppliers must have and apply appropriate safeguarding policies and procedures and must:
 - (a) identify and manage potential risks to participants and staff, particularly in relation to trauma, mental health, domestic abuse, self-harm or other sensitive issues
 - (b) train staff and associates involved in fieldwork on relevant safeguarding processes
 - (c) provide clear procedures for responding to distress, disclosure of risk, or complaints
 - (d) where appropriate, signpost participants to relevant support services
- 8.3 Suppliers must ensure their approaches are inclusive and accessible, including reasonable adjustments to enable participation by:
 - (a) people with disabilities
 - (b) those with caring responsibilities
 - (c) individuals with communication or literacy needs
 - (d) under-represented or marginalised groups within the armed forces community
- 8.4 Where required, suppliers must secure appropriate ethical review and approval for their Call-Off project (e.g. through an institutional ethics committee or equivalent, or MODREC if relevant), and evidence of such approval may be requested by the Trust.
- 8.5 Suppliers must align with the Trust's Code of Ethical Conduct (<https://covenantfund.org.uk/code-of-ethical-conduct>), share the values of the Trust and act in its best interests, and the interest of the Trust's beneficiaries.

9 DATA PROTECTION, CONFIDENTIALITY AND INFORMATION SECURITY

- 9.1 Suppliers must comply with all applicable data protection legislation and the Trust's data protection requirements, including where personal data, special category data or service-related information are processed.
- 9.2 Requirements include (but are not limited to):
 - (a) lawful basis for processing, clearly communicated to participants
 - (b) data minimisation, secure storage and controlled access

- (c) anonymisation or pseudonymisation where appropriate
- (d) secure transfer of data to and from the Trust
- (e) clear retention and deletion arrangements for data at project end

9.3 Suppliers must treat all information obtained during Call-Off contracts as confidential, unless otherwise agreed.

9.4 Where projects involve sensitive or potentially security-related data, additional information security and/or vetting requirements may be specified in the Call-Off documentation. Suppliers must comply with any such requirements.

10 INTELLECTUAL PROPERTY

10.1 Unless otherwise specified in a Call-Off contract, the Intellectual Property Rights (IPR) in all reports, data and materials produced under a Call-Off shall vest in the Trust (or as set out in the Framework Agreement).

10.2 Suppliers may retain a licence to use anonymised data and materials for academic or professional purposes only where:

- (a) explicitly permitted in the Call-Off contract
- (b) participant confidentiality and data protection are fully protected
- (c) such use does not prejudice or compromise the interests and reputation of the Trust

11 GOVERNANCE, REPORTING AND COMMUNICATION

11.1 For each Call-Off contract, governance arrangements shall be agreed and will include:

- (a) a named contract manager from the Trust
- (b) a named lead researcher and / or project manager from the supplier
- (c) a project steering or advisory group, where appropriate (which may include representatives from the MOD or the OVA, or individuals nominated by suppliers)

11.2 Suppliers will be expected to:

- (a) attend project inception meetings and regular progress meetings (frequency to be agreed)
- (b) provide progress updates (verbal or written) as agreed, including highlighting risks, issues and mitigation actions, as well as emerging findings or insights
- (c) maintain an up-to-date project plan and risk register, where proportionate

11.3 Communication must be timely, clear and professional, with early escalation of any significant risks to delivery.

12 PERFORMANCE AND KEY PERFORMANCE INDICATORS (KPIs)

12.1 The Trust will monitor performance at both a Framework and Call-Off levels.

12.2 Specific KPIs will be defined in each Call-Off contract, but may relate to:

- delivery of agreed milestones, on time and within the agreed budget

- quality of outputs, including adherence to agreed methods and meet quality assurance standards
- responsiveness to queries and ability to meet agreed response times
- participant safety and ethical compliance
- satisfaction of the Trust and key stakeholders with the process and the outputs

12.3 The Trust reserves the right to undertake performance reviews and to take appropriate action under the Framework or Call-Off terms where performance is unsatisfactory.

13 CALL-OFF ARRANGEMENTS

13.1 The Trust will award Call-Off contracts by mini-competition or other mechanism as set out in the Framework Agreement.

13.2 For each Call-Off, the Trust will issue a Call-Off Specification (Statement of Requirements) which will include:

- background to the project and objectives
- key research questions and areas of investigation
- expected outputs and timeline
- any specific methodological, ethical or security considerations
- the available budget for the work

13.3 Suppliers will be invited to submit a Call-Off Proposal that shall include:

- project understanding and proposed approach
- detailed methodology and workplan
- team, roles and time allocations
- risk management and ethics/safeguarding approach
- cost of the work based on the stated budget for the specific project

13.4 Assessment of Call-Off Proposals will be conducted in accordance with the criteria set out in the Framework Agreement and Call-Off documentation.

14 SOCIAL VALUE AND SUSTAINABILITY

14.1 In delivering services under this Framework, suppliers are encouraged to contribute to social value and environmental sustainability consistent with the Trust's policies and objectives, and the Armed Forces Covenant. This may include:

- creating opportunities for members of the armed forces community (e.g. employment, training or involvement in research activities)
- supporting capacity building and learning with grant holders and other stakeholders involved in research and evaluation
- minimising environmental impact in project delivery where possible

APPENDIX C – PROCUREMENT SPECIFIC QUESTIONNAIRE

PSQ Explainer

1.1 The PSQ consists of three parts:

- **Part 1 - Confirmation of Core Supplier Information:** suppliers participating in procurements will now be expected to register on a CDP. Suppliers can submit their Core Supplier Information and, where a procurement opportunity arises, share this information with the contracting authority via the CDP. It is free to use and will mean Suppliers should no longer have to re-enter this information for each public procurement but simply ensure it is up to date and subsequently shared. The CDP is available at <https://www.gov.uk/find-tender>. Part 1 provides confirmation that Suppliers have taken these steps.

(b) **Part 2 - additional exclusions information:** procurement legislation provides for an 'exclusion regime' and a published 'debarment' list to safeguard procurement from Suppliers who may pose a risk (for example, due to misconduct or poor performance). Suppliers must submit their own (and their Connected persons¹) exclusions information via the CDP. This includes self-declarations as to whether any exclusion grounds apply to them and, if so, details about the event or conviction and what steps have been taken to prevent such circumstances from occurring again.

As part of a procurement, a Supplier will need to also share additional exclusions information for any Suppliers that they are relying on to meet the procurement's Conditions of Participation. These could either be consortium members or key sub-contractors (but excludes any guarantors). These Suppliers are 'Associated Persons' and their exclusions information must be shared with the contracting authority. We recommend this is done by ensuring that Associated Persons register, submit and share their information via the CDP (like the prime/main Supplier).

In addition to the sub-contractors who are being relied on to meet the Conditions of Participation (who are Associated Persons), Suppliers will need to share an exhaustive list of all their Intended Sub-contractors, which will be checked against the debarment list.

If a sub-contractor is unknown at the start of the procurement (or brought in during it), this should be made clear by the Supplier and relevant details of the sub-contractor should be provided once their identity and role is confirmed. This information should be shared with the contracting authority as soon as possible and at least by final tenders.

(c) **Part 3 - Conditions of Participation:** contracting authorities may set Conditions of Participation which a Supplier must satisfy in order to be awarded a public contract. They can relate to the Supplier's legal and financial capacity or their technical ability.

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

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

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

- details of the winning Supplier's Associated Persons
- details of the winning Supplier's Connected person information
- for certain procurements over £5 million, details of unsuccessful bidders

1.4 Where a Supplier is unsure or requires any clarification, they should check with the contracting authority.

No.	Question
Preliminary questions	
1.	What is your name? (Supplier name) [Insert name]
2.	<i>You must be registered on the central digital platform (CDP).</i> What is your CDP Unique Identifier? [Insert Unique Identifier]
3.	Please confirm if you are bidding as a single Supplier (with or without sub-contractors) or as part of a group or consortium. If you are bidding as part of a group or consortium (including where you intend to establish a legal entity to deliver the Contract), please provide: <ol style="list-style-type: none"> a. the name of the group/consortium b. the proposed structure of the group/consortium, including the legal structure where applicable c. the name of the lead member in the group/consortium d. your role in the group/consortium (e.g. lead member, consortium member, sub-contractor) [Insert information]
4.	[Where applicable] Please confirm which lot(s) you wish to bid for? [Insert details]
5.	Are you on the debarment list? [Insert Yes or No] [If yes, insert details]

Part 1 – confirmation of Core Supplier Information

6. You must submit up-to-date Core Supplier Information on the CDP and share this information with us via the CDP (either a share code or PDF download).

This includes:

- a. basic information
- b. economic and financial standing information
- c. Connected person information (these are persons with the right to exercise, or who actually exercise, significant influence or control over the Supplier, or over whom the Supplier has the right to exercise, or actually exercises, significant influence or control over, for example: directors, majority shareholders and parent and subsidiary companies)
- d. exclusion grounds information

Please confirm you have shared this information with us.

[Insert reference / file name]

Part 2 – Additional exclusions information

Part 2A – Associated Persons

7. Are you relying on any Associated Persons to satisfy the Conditions of Participation? (these are other Suppliers who might be sub-contractors or consortium members but not a guarantor).

The Conditions of Participation are outlined in Part 3.

If so, please complete **Q8, Q9 & Q10** (otherwise **Q8, Q9 & Q10** are not applicable).

[Insert Yes or No]

8. For each Supplier/Associated Person, please confirm which condition(s) of participation you are relying on them to satisfy.

[Insert name of Supplier and brief description]

[Insert name of Supplier and brief description]

9. For each Associated Person, you must confirm they are registered on the CDP and have shared with us their information (either a share code or PDF download):

- a. basic information
- b. economic and financial standing information
(if they are being relied upon to meet Conditions of Participation regarding financial capacity)
- c. Connected person information
- d. exclusion grounds information

[Insert name of Supplier and reference / file name]

10. Are any of your Associated Persons on the debarment list?

[Insert Yes or No]

[If yes, insert details]

Part 2B – list of all intended sub-contractors

11. Please provide:

- a. a list of all Suppliers who you intend to sub-contract the performance of all or part of the Contract to (either directly or in your wider supply chain)
- b. their Unique Identifier (if they are registered on the CDP), or otherwise, a Companies House number charity number, VAT registration number, or equivalent
- c. a brief description of their intended role in the performance of the Contract

If you are not intending to sub-contract the performance of all or part of the Contract, then this **question 11 and Q12** are not applicable.

If a sub-contractor is unknown at the start of the procurement (or brought in during it), this should be made clear by the Supplier and relevant details of the sub-contractor should be provided once their identity and role is confirmed. This information should be shared with the contracting authority as soon as possible and at least by final tenders.

[Insert name of Supplier – Unique Identifier – brief description]

[Insert name of Supplier – Unique Identifier – brief description]

12. Please confirm if any intended sub-contractor is on the debarment list.

The debarment list can be found here [\[insert link\]](#)

[Insert Yes or No]

[If yes, insert sub-contractor(s) name and provide details]

Part 3 – questions relating to Conditions of Participation

Part 3A – standard questions

Financial capacity

13. Has your organisation, its directors, or parent company been subject to insolvency, liquidation, bankruptcy, administration, or similar proceedings in the past 5 years?

[Insert Yes or No]

14. Are you relying on another Supplier to act as a guarantor?

If so, please provide their name and evidence of their economic and financial standing.

[Insert Yes or No]

[If yes, insert reference / file name]

15. Please confirm whether you already have, or can commit to obtain, prior to the award of the Contract, the levels of insurance cover indicated below:

- a. Employer's (Compulsory) Liability Insurance* = £5 million
- b. Public Liability Insurance = £1 million
- c. Professional Indemnity Insurance = £1 million

*There is a legal requirement for certain employers to hold Employer's (Compulsory) Liability Insurance of £5 million as a minimum. See the Health and Safety Executive website for more information: www.hse.gov.uk/pubns/hse39.pdf.

[Insert Yes or No]

[Insert details of your insurances already in place]

[Insert details of your insurances which would be obtained following contract award but prior to entry into the Contract (including information on how you will obtain this insurance – e.g. a quote)]

Legal capacity

16. [Legal Capacity Conditions of Participation – added by contracting authorities if necessary]

N/A

17. Please confirm that you have in place, or that you will have in place by the award of the Contract, the human and technical resources to perform the Contract to ensure compliance with the UK General Data Protection Regulation and to ensure the protection of the rights of data subjects.

Please provide details of the technical facilities and measures (including systems and processes) you have in place, or will have in place by contract award, to ensure compliance with UK data protection law and to ensure the protection of the rights of data subjects. Your response should include, but should not be limited to facilities and measures:

- to ensure ongoing confidentiality, integrity, availability and resilience of processing systems and services
- to comply with the rights of data subjects in respect of receiving privacy information, and access, rectification, deletion and portability of personal data
- to ensure that any consent based processing meets standards of active, informed consent, and that such consents are recorded and auditable
- to ensure legal safeguards are in place to legitimise transfers of personal data outside the UK (if such transfers will take place)
- to maintain records of personal data processing activities
- to regularly test, assess and evaluate the effectiveness of the above measures

[Insert Yes or No]

[Insert information]

Technical ability

18. Relevant experience and contract examples

Please provide details of up to three contracts to meet Conditions of Participation relating to technical ability set out in the relevant notice or procurement documents, in any combination from either the public or private sectors (which may include samples of grant-funded work).

Where this procurement is for goods or services, the examples must be from the past three years.

The named contact provided should be able to provide written evidence to confirm the accuracy of the information provided.

For consortium bids, or where you have indicated that you are relying on an Associated Person to meet the technical ability, you should provide relevant examples of where the Associated Person has delivered similar requirements. If this is not possible (e.g. the consortium is newly formed or a special purpose vehicle is to be created for this Contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or members of the special purpose vehicle or sub-contractors (three examples are not required from each member).

If you cannot provide at least one example of previous contracts, please provide an explanation for this and how you meet the Conditions of Participation relating to technical ability.

[Insert information below]

	Contract 1	Contract 2	Contract 3
Name of customer organisation who signed the contract			
Name of supplier who signed the contract			
Point of contact in the customer's organisation			
Position in the customer's organisation			
Email address			
Description of contract			
Contract start date			
Contract completion date			
Estimated contract value			

[If you cannot provide at least one example of previous contracts that are relevant to the requirement, in no more than 500 words please provide an explanation for this and how you meet the Conditions of Participation relating to technical ability – e.g. your organisation is a new start-up or you have provided services in the past but not under a contract.]

19. **Experience of sub-contractor management**

Where you intend to sub-contract a proportion of the Contract, please demonstrate how you have previously maintained healthy supply chains with your sub-contractor(s) (which may be the Intended Sub-contractor(s) for this procurement or any others used previously).

The description should include the procedures you use to ensure performance of the Contract.

[Insert information]

20. **Organisational standards**

Where conditions of participation have specified organisational qualifications or standards, please provide details of how these are met, or other equivalent standards that equal or exceed what has been requested.

[Insert information]

21. **Health and safety**

Please describe the arrangements you have in place to manage health and safety effectively and control significant risks relevant to the contract (including risks from the use of Contractors, where relevant).

[Insert information]

Part 3B – requirements for central government departments, their executive agencies and non-departmental public bodies

[to be added]

Confirmations

22. I confirm that:

- to the best of my knowledge the answers submitted and information contained in this document are complete, accurate and not misleading
- upon request and without delay I will provide any additional information requested of us
- I understand that the response to this questionnaire will be used to assess whether our organisation is entitled to participate in, or continue to participate in, this procurement
- I understand that our organisation may be excluded from the procurement if requested information has not been provided, if any of this response or any follow up responses are incomplete, inaccurate or misleading, if confidential information has been accessed or if we have unduly influenced your decision-making in this procurement

[Insert Yes or No]

Signature

Date

Name

Position

Phone number

Email

Postal address

APPENDIX D – GLOSSARY

Defined term	Definition
Act	means the Procurement Act 2023.
Associated Person	means a person the Supplier is relying on in order to satisfy the Conditions of Participation (other than a guarantor).
Associated Suppliers	means a Supplier who is associated with another Supplier if either (a) the Suppliers are submitting a tender together, or (b) the Trust is satisfied that the Suppliers will enter legally binding arrangements to the effect that the Supplier will sub-contract the performance of all or part of the Contract to the other, or the other Supplier will guarantee the performance of all or part of the Contract by the Supplier (as set out in section 22(9) of the Act).
Award Stage	means Step 3 of the evaluation process described in Section 5 (The Procurement Process) of this ITT
Central Digital Platform (CDP)	means the online system defined by regulation 5(2) of the Procurement Regulations 2024 (SI 2024 No. 692).
Compliance Review	means the initial compliance review undertaken in advance of the evaluation described in Section 10 (The assessment process and award criteria) of this ITT
Conditions of Participation	means the conditions of participation set out in Section 10 (The assessment process and award criteria) of this ITT
Connected Person	<p>means:</p> <ul style="list-style-type: none"> a. a person with 'significant control' over the Supplier (within the meaning given by section 790C(2) of the Companies Act 2006 (CA 2006)) b. a director or shadow director of the Supplier c. a parent undertaking or a subsidiary undertaking of the Supplier d. a predecessor company e. any other person who it can reasonably be considered stands in an equivalent position in relation to the Supplier as a person within paragraphs a to d. f. any person with the right to exercise, or who actually exercises, significant influence or control over the supplier g. any person over which the supplier has the right to exercise, or actually exercises, significant influence or control

Defined term	Definition
Contract	means the framework agreement to be entered into by the Trust with each of the successful Suppliers.
Core Supplier Information	as defined in regulation 6(9) of the Procurement Regulations 2024.
Excluded Supplier	means a Supplier where the Trust considers, firstly, that a mandatory exclusion ground applies to the Supplier or an Associated Person and, secondly, that the circumstances giving rise to the exclusion ground are continuing or likely to occur again. A Supplier will also be an Excluded Supplier where a Minister of the Crown has already determined this – i.e. where the Supplier or an Associated Person is on the debarment list because of a mandatory exclusion ground.
Excludable Supplier	means a Supplier where the Trust considers, firstly, that a discretionary exclusion ground applies to the Supplier or an Associated Person and, secondly, that the circumstances giving rise to the exclusion ground are continuing or likely to occur again. A Supplier will also be an Excludable Supplier where a Minister of the Crown has already determined this – i.e. where the Supplier or an Associated Person is on the debarment list because of a discretionary exclusion ground.
Intended Sub-contractor	means any sub-contractor(s) that a Supplier intends to use as part of the procurement (i.e. to sub-contract the performance of all or part of the Contract to).
Invitation to Tender or ITT	means this document, including its associated appendices, as may be updated throughout the Procurement
Key Performance Indicators or KPIs	means the key performance indicators (KPIs) set out in the Services Specification.
Open Procedure	means an open procedure as defined in section 20 of the Act.
Participation Stage	means step 2 of the evaluation process described in Section 5 (The Procurement Process) of this ITT
Procurement	means this Open Procedure procurement process.
Procurement Specific Questionnaire or PSQ	means the procurement specific questionnaire included in Appendix C of this ITT.
Procurement Timetable	means the timetable for this Procurement as set out in Section 6 (Procurement timetable) of this ITT.
Service Credits	means the service credits set out in the Service Specification.
Service Levels	means the service levels set out in the Service Specification.
Supplier or Suppliers	means a supplier or suppliers (as the case may be) participating in the Procurement

Defined term	Definition
Tender Notice	means the tender notice with reference 2025-000007 published on 15 December 2025 on the Central Digital Platform
Tender	means the Supplier's response to this ITT, including the response to the PSQ.
Tender Return Deadline	means the deadline(s) specified as such in the Procurement Timetable
The Trust	means the Armed Forces Covenant Fund Trustee Limited acting as trustee of the Armed Forces Covenant Fund
Unique Identifier	as defined in regulation 8 of the Procurement Regulations 2024. In the case of a Supplier, it is the unique code which is submitted to the central digital platform and is recognised by that platform or, where no such code is submitted and recognised, it is the unique code which is allocated by that platform when the Supplier registers on that platform.

APPENDIX E – FORM OF TENDER

Dear Sir or Madam

Form of tender

I/We, the undersigned, tender and offer to provide the Contract as listed below, which is more particularly referred to in the ITT supplied to me/us for the purpose of tendering for the provision of the Contract and on the terms of the draft Contract.

Included within this document are the following:

Checklist for Suppliers

List all documents to be submitted.

Document number	Document name	Included (Y/N)
		</

Note: If Suppliers do not provide all of the items in the checklist, this may result in the response being treated as non-compliant and therefore rejected.

I/We confirm that I/we can supply the contract as specified in our response to the ITT and in accordance with the financial model response submitted.

I/We confirm that we accept the terms of the draft Contract as issued with the ITT.

I/We confirm that prices submitted as part the Tender response are tendered without any caveats or qualifications.

I/We understand that the Trust reserves the right to accept or refuse the Tender response in accordance with the Procurement Act 2023 and/or the ITT.

I/We confirm that all information supplied to the Trust and forming part of the Tender response is true and accurate.

I/We confirm that the Supplier, together with all Associated Suppliers:

- are registered on the Central Digital Platform
- have ensured their information contained on the Central Digital Platform is true and accurate

I/We confirm and undertake that if any of such information becomes untrue or misleading that I/we shall notify the Trust immediately and update such information should this be required.

I/We confirm that the Tender response will remain valid for 90 days from the date of this form of tender or until any procurement challenge/s have been resolved.

I/We confirm that I/we are authorised to commit the Supplier to the contractual obligations contained in the ITT and the draft Contract.

I/We confirm that the Supplier, together with all Associated Suppliers have developed the Tender response in full compliance with the ITT, including but not limited to, the requirements in Appendix A of the ITT.

I/We understand that non-compliance with the requirements of the ITT or with any other instructions given by the Trust may lead to me/us being excluded by the Trust from (further) participation in the Procurement.

I/We agree that the Trust may disclose the Supplier's information/documentation (submitted to the Trust during this Procurement) more widely within government for the purpose of ensuring effective cross-government procurement processes, including value for money and related purposes.

Signature

Name (print)

Position

Supplier name

Date

APPENDIX F – COMMERCIALLY SENSITIVE INFORMATION

This appendix should be read in conjunction with the relevant paragraphs relating to freedom of information (FOIA) and environmental information (EIR) in the Procurement terms and conditions.

I declare that I wish the following information to be designated as commercially sensitive:

The reason(s) it is considered that this information should be exempt under FOIA and EIR is:

The period of time for which it is considered this information should be exempt is:

Supplier to amend as appropriate e.g. [until award of contract OR during the period of the contract OR for a period of [number] years until [month], [year]].

Signature

Name (print)

Position

Supplier name

Date

APPENDIX G – RATE CARD TEMPLATE FOR COMMERCIAL EVALUATION

This appendix should be read in conjunction with the relevant paragraphs relating to the commercial evaluation. The template should be used to provide the total cost for each role (or nearest equivalent) for the number of days stated. The average cost across the team (total overall cost ÷ number of members in the team) will be used to score the commercial criteria, with the lowest amount scoring the highest mark (weighted maximum 10%).

Role	Scope	No. of days	Total (£)
Director / Principle Investigator	Provides strategic leadership and oversight of the project and quality assurance. Representative at high level.	20	
Senior Evaluation Lead	Leads on the development of evaluation frameworks; designs and oversees the methodology. Main 'owner' of the project.	60	
Researcher / Analyst	Core delivery role responsible for implementing data collection and analysis tasks. May be junior or mid-level.	120	
Statistician / Data Scientist	Specialist role providing advanced quantitative design and analysis expertise where needed.	30	
Qualitative Researcher / Fieldworker	Specialist in qualitative and field-based data collection and analysis. (This role may perform a similar role to a Researcher / Analyst)	60	
Project Manager	Planning, coordination, logistics and delivery oversight. Maintains projects plans, coordinates meetings, provides progress reports.	40	
Administrative / Support	Support role providing administrative, clerical and operational assistance to the project team.	40	
Total cost (£)			
Average (£)			