

Invitation to Quote

Project Name: Publishing services for the ESPA
policy briefs, guides and working papers

Date: December 2017

1. Instructions for completion

Section 2 to be completed by the Bidder and returned to the manager@espa.ac.uk and communication@espa.ac.uk

Timetable of events

Date of Issue of this tender	20 December 2017 *Please note that ESPA staff are not available to respond to queries between 21 December and 3 January*
Closing date for queries submitted to manager@espa.ac.uk and communication@espa.ac.uk	Monday 8 January 2018, 17:00 UK time
Clarification questions and answers posted on ESPA website	Wednesday 10 January 2018
Closing date for receipt of final proposal	Monday 15 January 2018, 17:00 UK time

2. Project Details

ESPA Project Manager for this work	Mairi Dupar
Operations Manager	Eliane Reid

Project Title	Publishing services: ESPA policy briefs, working papers and impact stories
Description/Background	<p>ESPA is an 8-year, global interdisciplinary research programme that aims to give decision-makers and natural resource users the evidence they need to address the challenges of sustainable ecosystem management and poverty reduction. ESPA's key objectives are:</p> <ul style="list-style-type: none"> To create a strong research and evidence base on the connections among ecosystem services, their dynamics and management, human use and pathways to sustainable poverty reduction; To develop innovative, interdisciplinary research and methodologies, delivering tools and approaches that enable decision-makers to simulate and predict socio-ecological responses to complex social and economic trends; To engage and communicate effectively with policy makers, practitioners and decision makers so that ESPA's research is well understood and used; To enhance the capacity of researchers in the global South to conduct, lead, use and communicate high quality ESPA-type interdisciplinary research, including through effective international research partnerships. <p>The ESPA programme will close at the end of March 2018. The ESPA Directorate team, based in Edinburgh, is focusing its final months of effort on creating a robust legacy of results and learning from this major UK government investment. The production of the policy briefs, working papers and impact stories described in this Invitation to Quote is important to ESPA's legacy.</p> <p>This Invitation to Quote covers a range of integrated publishing services, comprising, on a case by case basis:</p> <ul style="list-style-type: none"> • Substantive editing where required. • Proofreading to ESPA house styles (guidance will be provided). • Layout to established ESPA publications templates (Indesign templates will be provided). • Printing where required.
Target Audience	The target audiences for ESPA's publications vary on a case by case basis. The policy briefs tend to be targeted toward decision-makers in government, businesses, multilateral development agencies, the media and NGOs who are 'time scarce' and want to access the key

	<p>messages in accessible form, with references to the more detailed evidence.</p> <p>Several of the publications included in this batch are of a more targeted nature and are specifically for donor agency personnel and the managers of research programmes similar to ESPA.</p>
Proposed contract start date	As soon as possible following selection of the preferred bidder in mid-January 2018.
Proposed contract duration	To 15 March 2018
Detailed specification	
Deliverables	<p>1. Authorship of key messages and substantial writing/rewriting of conference notes from a group of expert authors on the linkages between ecosystem services provision and human wellbeing. The authors will generate some 4,000 words of notes at a 'writeshop' on 1-2 February 2018, which will be delivered to the supplier for formulating into an ESPA policy and practice brief.</p>
Technical requirements	<p>2. Substantive editing of the following manuscripts that will be authored by ESPA's Communications Specialist and Impact and Learning Specialist, respectively:</p> <ul style="list-style-type: none"> - Policy and practice brief: Randomised controlled trials in conservation. Est: 2500 words. - Policy and practice brief: Ecosystem based approaches to disaster risk reduction in coastal management. Est: 2500 words. - Working paper: Research with impact (learning from ESPA, for researchers). Est: 7500 words. - Working paper: Greater than the sum of its parts – programme level impact (learning from ESPA, for funders). Est: 7500 words. - Impact story: Climate-smart cocoa production. Est: 2500 words. <p>3. Proofreading to a defined house style of all of the above-mentioned manuscripts.</p> <p><u>In addition</u>, proofreading only of the following manuscripts, which will already have been substantively edited in-house by the ESPA team. Please note that two stages of proofreading will be required: an initial proofread of full manuscript before layout, plus a final proofread and integration of corrections at design proof stage.</p> <ul style="list-style-type: none"> - Policy brief: Sustainable, ecosystem-based approaches to fisheries management. Est: 2500 words.

- Working paper: Sustainable, ecosystem-based approaches to fisheries management. Est: 12,000 words.
- Policy brief: Managing trade-offs around protected areas. Est: 2500 words.
- Policy brief: Potential of urban and peri-urban areas to support agriculture and other ecosystem services. Est: 2500 words.
- Policy brief: Managing for livelihoods and ecosystem services in populous deltas. Est: 2500 words.
- Policy brief: Governance of ecosystem services. Est: 2500 words.
- Impact story: Livelihoods and ecosystem management in the Western Himalayas. Est: 2500 words.
- Impact story: 'Watershared'. Est: 2500 words.
- Impact story: Sustainable water management in mountainous ecosystems (Mountain EVO). Est: 2500 words.
- Impact story: Planning for sustainability in populous deltas (Deltas project). Est: 2500 words.
- Impact story: Swahili Seas – mangrove restoration. Est: 2500 words.

4. **Layout** of all of the above signed-off manuscripts into existing Indesign templates, as provided by the ESPA team. These will comprise:

- o a policy and practice template
- o a tools and frameworks template
- o a working paper template.

Furthermore, it is expected that **up to one day's design time** will be required to modify ESPA's existing policy brief and working paper templates to accommodate the needs of the 'impact stories' and working papers described here. (The 'impact stories' template as such will be a small modification of the policy brief template and the working paper template requires some minor amendments.)

5. **Original graphic design.** Please quote for two original but simple infographics to be incorporated in the working papers. Please indicate an hourly design rate, for our information (should further original graphics work be required, above this baseline).

6. **OPTIONAL: Printing**

Printing is given as 'optional' in this Invitation to Quote insofar as it is OPTIONAL for bidders to quote for the printing work or not, and it is also OPTIONAL for ESPA to contract for the printing part of the quote: ESPA will make a decision on whether or not to contract for printing once we have evaluated the final budgets submitted. Bidders who elect not to quote for printing as part of

	<p>this tender shall not be penalised. Please also be aware that ESPA is willing to pay for reasonable project management costs on the part of the supplier organisation, in order to subcontract and manage printing services. If you do quote for printing and any associated project management, please make sure that these costs are shown very transparently in the attached budget spreadsheet.</p> <p>Printing of 200 copies of the two working papers on ESPA learning described here and delivery to a single address in Edinburgh, UK.</p> <p>Printing of 200 copies x four policy briefs (each 2500 words/estimated 4 x A4, full colour).</p> <p>7. OPTIONAL: Travel to Bilbao, Spain. It is an optional part of this Invitation to Quote to provide for travel of a qualified writer/editor to Bilbao, Spain in order to attend a 'writeshop' on 1-2 February 2018 (ie, travel on 31 January and 3 February 2018) in support of a policy brief on linkages between ecosystem services provision and human wellbeing. If the bidding organisation does not have availability during these set dates, they may omit this item from their bid and will not be penalised. ESPA is willing to make additional budget available to support reasonable travel costs for a writer/editor to attend the workshop in person. The work may still be carried out, without in-person participation and as described in (1) above, by the writer/editor's securing access to the notes by the lead organisers of the writeshop, after the fact.</p>
Milestones	<p>Delivery milestones will include:</p> <ol style="list-style-type: none"> 1. Initial meeting with ESPA to review the workplan. 2. Detailed project plan. 3. Regular update meetings as requested by ESPA: as frequently as weekly, if required. Summaries of the meetings and action points to be disseminated by the Supplier. 4. One round of substantive edits, as indicated, per publication, where required. 5. Two rounds of proofreading: first on the Word document, second round on the design proof. ESPA expects to see two rounds of design proofs for each publication before signing off a final version. 6. Delivery of web-ready and print-ready pdfs and related packaged Indesign files to the assigned ESPA project manager, for all publications produced. Delivery of the printed hard copies to Edinburgh (as relevant).
Quality requirements	<p>Qualified personnel in the Supplier organisation must have the proven ability to deliver projects of this nature. The narrative proposal must include curriculum vitae or biographies of all named personnel who are</p>

	<p>proposed to hold design roles or significant project management/production management roles in this project. In the case of the designer(s), links to a representative portfolio of work must be included, in order for the proposal to be considered.</p> <p>The final product must be of professional and publishable quality and broadly in line with ESPA's brand guidelines (including acknowledgement of ESPA's donors), which will be provided.</p>
<p>Timeline and Project Plan</p>	<p>Timings on this project are tight; hence any proposal must illustrate how the supplier will ensure delivery of key stages and the final product in a timely fashion. For this reason, demonstrated capacity and flexibility on the Supplier's part, and their ability to commit to a detailed production plan with ESPA, are essential.</p>
<p>Pricing Proposal</p>	<p>ESPA welcomes proposals up to a ceiling of GBP 10,000 PLUS VAT for the full set of deliverables <i>minus printing and travel to Bilbao, Spain</i> outlined in this Invitation to Quote document.</p> <p>The optional budget lines for printing and travel to Bilbao, Spain, should be provided separately and do not fall within the GBP 10,000 (plus VAT) ceiling.</p> <p>Please note that the bids will be evaluated on a value for money basis.</p> <p>The optional quote for printing must be presented separately.</p> <p>Any budgeting for travel to Bilbao, Spain, must be broken down into projected transportation and expenses components and also additional personnel fees, as relevant (ie showing clearly how many additional person-days would be charged).</p>
<p>Financial Detail</p>	<p>ESPA expects a detailed breakdown of costs including: staff time/day rate; design costs; proof reading costs; indicative number of days per task; printing costs; etc.</p> <p>Prices to be quoted in GBP – clearly showing the UK VAT component and any other taxes and surcharges.</p> <p>Bids will only be accepted if the budget spreadsheet attached (XLS) is completed.</p>
<p>Any specific requirements</p>	<p>Paper should be recycled or FSC certified and a statement should be provided about the environmental footprint of the inks used and any other pollution mitigation measures taken by the supplier (such as carbon offsetting, etc).</p>

1. Procurement Information

Date for RFP return	15 January 2018, 17:00 UK time
Instructions for return	<p>The submissions should be emailed to manager@espa.ac.uk and communication@espa.ac.uk</p> <p>Please send the budget breakdown in separate excel document using the template attached.</p>
Evaluation (Quality / Price)	<p>Overall quality-70%</p> <ul style="list-style-type: none"> • Experience – demonstrated track record of proposed team and provision of portfolio of examples - 40% • Resource allocation (capacity to deliver the work) -10% • Methodology – proposed project management approach -10% • Quality standards including environmental standards (environmental footprint of proposed paper and inks, carbon footprint and any offsetting measures, ISO compliance etc.)-10% <p>Overall price-30%</p>
Specific Evaluation Criteria (if any)	<p>Award of this contract will be based upon the written proposal (according to the weighting given above). If there is a tie following the initial ranking of proposals, the ESPA team will request the shortlisted Bidders for a short meeting, which may be either in person in Edinburgh or by skype video chat. The written submission should contain:</p> <ol style="list-style-type: none"> 1. Information about the Bidder's track record. <p>Please note that bids must include examples of edited work by the individuals who are named in your tender response, and with accompanying notes about the specific editing and proofreading experience and/or qualifications they hold. Include least two samples from the past two years of similar work produced by the proposed team members, in their individual capacities.</p> <ol style="list-style-type: none"> 2. CVs of all proposed staff to be assigned from the bidding organisation to undertake this work. 3. Relevant current and previous clients should be listed. 4. A description of the bidder's experience in working with non-governmental organisations, universities and/or research institutions would be useful, along with any experience of working on issues relating to environment and development. 5. Methodology Information about the bidder's project management approach.

	<ol style="list-style-type: none"> 6. A clear proposal for how the work would be assigned across team members in the bidding organisation (e.g., which person would act in a supervisory/gatekeeper capacity, who would lead on the different aspects of delivery, etc.). 7. 'Green' credentials of the bidder and its subcontractors. It is acceptable to submit two comparative bids for the same goods and services, one with the 'greener' credentials (in the event that it costs more to guarantee the most eco-friendly printing, operations, etc.) and one with 'less green' credentials, in order to show any differential costs transparently.
Any further information	References and endorsements welcome.

2. Supplier Response

a. Supplier details

Supplier Name	
Supplier Country	
Type of Organisation	
Lead Contact	
Supplier Address:	
Supplier Tel:	
Supplier Email:	
Supplier website:	

b. Sub-contractors

Please provide details. Information box can be replicated to provide details of more than one sub-contractor if applicable

Sub-contractor Name	
Sub-contractor Country	[Please indicate which country your main office is located]
Type of Organisation	[Please indicate the legal status of your business – such as, Commercial Organisation, Government Agency, NGO, Charity]
Lead Contact	
Sub-contractor Address:	

c. Evaluation Criteria

Please provide evidence of the following criteria

Overall quality: 70% of tender weighting

- Experience – demonstrated track record of proposed team, and what and how they have delivered for specified clients; provision of portfolio of examples, including creativity of design approaches - 40%
- Resource allocation (capacity to deliver the work) -10%
- Methodology- Proposed project management approach -10%
- Quality standards including environmental standards (environmental footprint of proposed paper and inks, carbon footprint and any offsetting measures, ISO compliance etc.) -10%

d. Pricing Information

Overall price - 30% of tender weighting

Project Cost (excluding expenses)	£ [Day rates etc.] Please complete the ESPA budget spreadsheet attached (see tender page on the ESPA website)
Expenses	£ [Please break down any component costs in excess of £250] Please incorporate the ESPA budget spreadsheet attached. If two different options are being presented for 'green credentials' of outputs and operations (eg 100% recycled vs part-recycled or FSC paper), then please present these separately and transparently as two different quotes, making clear the rationale for the different pricing.
Total Price excluding VAT and Taxes	
VAT and Taxes	
Total Price including VAT and Taxes	

e. Expenses Policy

Please confirm you have read and understood our Expenses Policy (published on the tender page)	Yes/No
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f. Statement of Compliance

The bidder must confirm the following. Failure to include this declaration may result in the bid being disqualified	
1. I have completed and enclosed all information required in the ITQ in the format and order required.	Yes/No
2. I declare that this is a bona fide response to your ITQ.	Yes/No
3. I declare that the organisation will comply with the terms and conditions of contract	Yes/No
4. I declare that I am aware of the next steps of the procurement process, if appropriate	Yes/No
5. I declare that the organisation is not aware of any connection with a member of staff from ESPA or Research into Results which could affect the outcome of this procurement process.	Yes/No
6. I declare that I am not aware of any potential conflicts of interest in submitting this ITQ	Yes/No

If you have replied NO to any of the above, please provide a detailed explanation below