Maastricht University

Tender Procedure Guideline for External Consultancy Grant Support

Research Office, FHML

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The FHML Grants Office applies the following step-by-step procedure for hiring external grant writing support. While we recommend to contact the funding advisor/Grants Office for all tenders, this procedure is mandatory for researchers who seek UM/ FHML financial support for hiring an external grant support consultancy. Incentives to partially cover the consultancy costs are only available when UM is the coordinator of the grant application.

1. Expression of interest
A researcher who wishes to seek external support should contact the her/his School's funding advisor (see Table below) as soon as possible, and no later than 4 months prior to closing of the call. Exceptions should be duly motivated and are evaluated on a case-by-case basis.

The researcher and funding advisor will discuss whether external consultancy support is necessary and if so, what type of support is needed. The researcher and funding advisor will make agreements on the tendering procedure (including the option for a pre-tender meeting), the evaluation criteria, potential consultancies, expertise of consultants, type of support, fee structures (see step 6) and timelines.

The funding advisor will contact the School's managing director to inquire if the School supports the tender request.

2. Pre-tendering meeting with consultants (optional)
The goal of a pre-tendering meeting is to provide consultancies with more contextual information as well as to receive input, which results in both a more targeted tender and tailor-made offer. This meeting can be of added value when there is ample time prior to the call deadline and/or the tender is complex.

The funding advisor will arrange separate pre-tendering meetings between the researcher and minimal 3 consultancies (can be local or overseas). The funding advisor will attend the meetings and safeguard that all consultancies receive similar information.

3. Prepare the tender document
The researcher and funding advisor will discuss the details of the tender document: type of support, assessment criteria (e.g. priorities and relative weights), timeline, communication, etc. The tender document will be drafted by the funding advisor and reviewed/edited by the researcher.

The researcher and funding advisor will discuss their availability for all the deadlines: the tender closing deadline, discussing the offers, and responding to the offers (usually within 3 days after closing of the tender deadline).

4. Call for tenders
The funding advisor sends out the tender to at least 3 consultancies. Consultancies normally receive 5 working days to respond with an offer. In some cases, more time may be required (e.g. holidays, complexity of the projects, inclusion of multiple grant calls).

5. Amendments to tender document
Until 2 days prior to closing of the tender deadline, consultancies have the option to send requests/questions only to the funding advisor who issued the tender. The funding advisor (i.e., not the researcher) will provided the requested information to all consultancies in an anonymous and non-discriminatory manner (I.e., without mentioning the name of the constancy who raised the question). The funding advisor will respond to such questions swiftly, preferably within 1 working day.

If raised questions require significant time to implement or lead to major changes in the quotation, an extension of the tender closing time can be given; this extension will be decided jointly by the funding advisor and researcher. In this event, the funding advisor will inform all consultancies in writing (requesting confirmation receipt of change in deadline).

6. Evaluation
Once the tender deadline has closed and offers are received, the funding advisor and researcher will discuss the quotations. The researcher and the funding advisor will critically assess every quotation, e.g. whether it complies with the essential requirements set out in the tender document, and in which way it addresses the selection criteria.

7. Selection
After the evaluation, researcher(s) and the funding advisor will select one consultancy for acceptance. Results of the selection should be communicated to the consultancies within 3 working days. If more time is required, a new timeline should be communicated to the consultancies asap.

Optionally, if a final selection cannot be made based on the written offers, the researcher and funding advisor can initiate an interview with a subset of consultancies based on the preliminary selection. The funding advisor will communicate with and coordinate these interviews with the selected consultancies. During the interview, criteria as laid out in the offer can be discussed. The researcher is also advised to seek out additional information not provided in the written offer, e.g., teamwork, cooperation and communications. Of note, disclosure of any unauthorized information concerning offers from other competitor consultancies is prohibited during the interview.

8. Formal decision
Upon completion of the evaluation and selection procedure, the funding advisor will send out a written letter of acceptance or rejection to all the consultancies that made offers.

9. Contract signing
The selected consultancy and the respective legal/financial authority of the researcher's department (normally the School Manager) will arrange and sign a formal agreement. As this contract is a legally binding document, it is important to have a thorough understanding of the terms and conditions of the contract prior to signing.

10. Consultancy evaluation

The funding advisor and researcher will meet after the consultancy work is completed and the proposal has been submitted in order to evaluate the external support received. The researcher will be asked to complete a standard questionnaire and/or participate in a wrap-up meeting (30 min) for this purpose.

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