



Department  
for Work &  
Pensions

**Invitation to Tender:**

**Managing Sickness Absence in Small and Medium  
Enterprises Phase 3**

**Instructions to Bidder**

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**INSTRUCTIONS AND INFORMATION ON TENDERING PROCEDURES**

**1. General Information**

- 1.1. Please note that, unless otherwise indicated, references to the "Authority" throughout these documents mean the Secretary of State for Work and Pensions acting through his/her representatives in the Department for Work and Pensions and references to "Bidder" means Kingston University Enterprises Limited.
- 1.2. These instructions, together with the Specification and all other information and documents to which they refer, are designed to ensure that the Bidder is given fair consideration. It is important, therefore, that you provide all the information asked for in the format and order specified.
- 1.3. This document contains the information and instructions the Bidder needs to submit a completed Tender, for example:
  - Information regarding the procurement, such as the timetable, specific conditions of contract, evaluation process and award/evaluation criteria;
  - How to submit questions and requests for clarification;
  - Instructions explaining how to complete and submit a Tender.
- 1.4. Please read the information and instructions carefully because non-compliance with the instructions may result in disqualification of your Tender from this procurement.

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**2. Administration of the Procurement Process**

- 2.1. The Authority will be administering the procurement process electronically via the [DWP e-Procurement Solution \(ePS\)](#) portal. No hard copy documents will be issued and all communications with the Authority (including final submission of the Tender) will be conducted via the ePS Portal.
- 2.2. To ensure all communications relating to this procurement are received, the Bidder must ensure that the point of contact it nominates in the ePS Portal is accurate at all times. Access to the Portal is available 24 hours a day, 7 days a week, and 365 days a year anywhere in the world via the internet unless there are technical issues with the portal that the Authority is aware of and issued a message regarding any technical problems otherwise by the Authority via the ePS portal.
- 2.3. Support available to help you to understand and use the ePS portal includes:
- Freephone helpdesk (0800 069 8630), available Mon-Fri 8am to 6pm (UK time in English language only);
  - Help guides;
  - or by emailing: [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk)
- 2.4. The Bidder must ensure that their ePS registration directly relates to the part of the Bidder organisation that submits the Tender and enters into the contract if successful (i.e. some larger Bidders may have several subsidiaries so registration needs to apply to that part of organisation responsible for this particular requirement).

**3. Conditions Applying to this Tender**

3.1. Authority's Terms and Conditions

The Bidder is not permitted to submit their own terms and conditions, whether standard or otherwise and no amendments to the Authority's terms and conditions will be considered.

3.2. Costs and Expenses

The Bidder will not be entitled to claim from the Authority any costs or expenses which may be incurred in preparing and/or submitting its' Tender.

This applies whether or not the Bidder is successful and also applies to any additional cost a Bidder may incur if the Authority modifies or amends its requirements or if the Authority cancels this procurement for whatever reason.

3.3. Confidentiality

All information supplied by the Authority to the Bidder must be treated in confidence and not disclosed to third parties other than is necessary to obtain sureties or quotations for the purpose of submitting your Tender. All information supplied by the Bidder to the Authority will similarly be treated in confidence except:

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- For the disclosure of such information with regard to the outcome of the procurement process as may be required to be published in the in accordance with the requirements of UK government policy on the disclosure of information relating to government contracts;
- In pursuance of the Authority's obligations under the Freedom of Information Act 2000 or any other legal requirement; or
- That references may be sought from banks, existing or past clients, or other referees submitted by the Bidder.

**3.4. Amendments to the Tender Process or Tender Documentation by the Authority**

The Authority reserves the right to vary the Tender process and/or amend the Tender documentation (including this ITT Instructions to Bidder document) at any time prior to the deadline for receipt of Tenders. Any such amendment will be numbered, dated and issued by the Authority via the ePS portal. Depending on the nature of the amendments and whether the amendments are significant, the Authority may at its discretion extend the deadline for receipt of Tenders.

The Authority reserves the right to discontinue the procurement process at any time and not to award a contract.

**3.5. Previous or current contracts with the Authority**

The Bidder should note that the Tender will be evaluated purely on their response to this ITT and previously undertaken work for the Authority will not be taken in to account. The Authority's prior knowledge or experience of organisations will not form part of the evaluation.

**3.6. Inducements**

Offering an inducement of any kind in relation to obtaining this or any other contract with the Authority will disqualify your Tender from being considered and may constitute a criminal offence.

**3.7. Conflicts of Interest**

The Bidder is responsible for ensuring that there are no conflicts of interest between, on the one hand, the Bidder and/or the members of the Bidder's Team and, on the other hand, the Authority. The concept of a conflict of interest includes any situation where relevant personnel members of the Bidder have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the Procurement Process.

The Bidder must notify the Authority of any actual or potential conflict of interest that may be relevant to this Procurement Process and/or the submission or evaluation or any Tender as soon as reasonably practicable after it becomes aware of such a conflict. Failure to declare such conflicts and/or failure to address such conflicts to the reasonable satisfaction of the Authority may result in the Bidder and/or members of the Bidder's Team being excluded from further participation in the Procurement Process.

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3.8. Non-Collusion

If the Bidder or member of the Bidder's Team, in connection with this Procurement Process and without obtaining the prior written consent of the Authority:

- fixes or adjusts the amount of its Tender by or in accordance with any agreement or arrangement with any other person (other than a member of the Bidder's Team acting in that capacity);
- enters into any agreement or arrangement with any other person (other than a member of the Bidder's Team acting in that capacity) that it shall refrain from making a Tender or as to the amount of any Tender to be submitted;
- causes or induces any person to enter such agreement as mentioned within paragraphs 3.8. or to inform the Bidder or a member of the Bidder's Team of the approximate amount of a rival Tender or offers any inducement, fee or reward to any servant or agent of the Authority or any person acting as an advisor to the Authority in connection with the Procurement Process or does anything which would constitute a breach of the Prevention of Corruption Act 1889 to 1916;
- offers or agrees to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other Tender or proposed Tender any act or omissions; or
- communicates to any person other than the Authority or a member of the Bidder's Team the amount or approximate amount of its Tender (except where such disclosures are made in confidence to obtain quotations necessary for the preparing of the Tender).

will be disqualified (in either case without prejudice to any other civil remedies available to the Authority and without prejudice to any criminal liability which such conduct by the Bidder or member of the Bidder's Team may attract).

3.9 Freedom of Information Act - (ITT Technical Envelope & Annex Q) and other legal requirements for disclosure

The Authority is committed to open government and to meeting its legal responsibilities under the Freedom of Information Act 2000. All information submitted to the Authority may need to be disclosed by the Authority in response to a request under the Act and/or in relation to any other legal requirement. If you consider that any of the information included in your Tender is commercially sensitive, please identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity.

You should be aware that even where you have indicated that information is commercially sensitive, the Authority may be required to disclose it under the terms of the Act or any other legal requirement, if a request for disclosure is received by the Authority. Please note that the receipt of material marked 'confidential' or equivalent by the Authority should not be taken to mean that the Authority accepts any duty of confidence by virtue of that marking.

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**4. Purpose and Background**

- 4.1 Evidence from the 2016 'Improving Lives: The Work, Health and Disability Green Paper' consultation showed that employers face a number of key barriers to doing more around disability employment:
- a lack of confidence and understanding of what to do, or what support exists;
  - concern around risks or costs of employing disabled people; and
  - or fear of 'doing or saying the wrong thing'
- 4.2 Employers responding to the consultation consistently said that improved access to information and guidance on how to build inclusive, healthy workplaces would support them to overcome these barriers and do more.
- 4.3 Through an open competition in 2016, the Authority sought innovative proposals for interventions aimed at better supporting Small and Medium Enterprises (SMEs) to manage long-term sickness absences and support early returns to work.
- 4.4 The project ran over 2 phases:
- MSA 1 involved successful suppliers undertaking feasibility studies in to their chosen solutions and reporting their findings to DWP.
  - MSA 2 involved successful suppliers developing and testing their working prototypes and reporting their findings to DWP.
- 4.5 An online Return to Work Toolkit was developed under MSA 2, which delivered a staged approach for employees with common mental health conditions and their SME employers; it focused on supporting constructive communications within the first four weeks of sickness absence.
- 4.6 Following positive feedback from organisations testing the online toolkit during MSA 2, WHU intend to enhance the online toolkit to include physical health conditions/disabilities.
- 4.7 MSA 3 will contribute to the achievement of the Government's 2017 Manifesto commitment to support 1 million more disabled people into employment over the next 10 years and the command paper commitment to "improve advice and support both at a national and local level, making sure it works for employers of all sizes, in particular SMEs, and for their employees".
- 4.8 This chosen procurement route is a single tender with Kingston University Enterprises Limited.

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**5. Procurement Timetable**

- 5.1. Set out below is the proposed procurement timetable. This is intended as a guide and, whilst the Authority does not intend to depart significantly from it, there may be occasions where the timetable will be subject to minor change.

<b>Activity</b>	<b>Date</b>
ITT published via Bravo Solutions	06/06/19
ITT Question & Answer period	06/06/19 – 25/06/19
ITT notice published on Contracts Finder	07/06/19
ITT closing date	01/07/19 @ 10:00 am
Post-tender clarifications (if required)	02 – 04/07/19
Award Letter and T&Cs issued to Supplier	05 – 17/07/19
Signed contracts received from Supplier	24/07/19
Contract signed by DWP	25/07/19

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**6. Deadline for Submission of Tenders**

- 6.1. The Tender must be received by the Authority by the Tender submission deadline of 10:00 am, 1 July 2019 (see procurement timetable).
- 6.2. A Tenders received after the Tender submission deadline may be rejected by the Authority. A case of late submission will be considered by the Authority on the basis of evidence available prior to a decision being made as to whether or not the ITT should be accepted. For the avoidance of doubt the Authority reserves the right at its absolute discretion to reject the entire Tender.
- 6.3. The Bidder may withdraw from this procurement by choosing not to submit a Tender by the Tender submission deadline. Should this be the case, please advise the Authority as soon as possible and the reasons behind your decision.

**7. Tender Submission Process (DWP e-Procurement Solution)**

**Background**

- 7.1. The ePS portal relies on the completion of three envelopes which will contain all of the information the Authority requires to enable full evaluation to take place. All information should be uploaded as per instructions into the relevant envelopes on the ePS portal:
  - Qualification Envelope – Is used for gathering information to qualify the Tender for further evaluation;
  - Technical Envelope – Is used for gathering information to allow for full evaluation of the technical side of the proposal;
  - Commercial Envelope – Is used to gather the Pricing Proposal.

**Tender Completion**

- 7.2. The information or text contained within the ITT (including its Annexes) and your response, any amendments to the ITT and any exchange of correspondence or information between the Authority and Bidder may be incorporated, whether by reference or otherwise, into any subsequent contract that the Authority and the successful contractor may enter into as a result of this procurement exercise.
- 7.3. To participate in this procurement, the Bidder is required to submit a fully compliant Tender and must answer all questions accurately and concisely as possible. Only information provided in response to the ITT will be evaluated. The Authority reserves the right to reject any non-compliant Tender.
- 7.4. The Bidder should answer all questions using the templates provided, presenting them in the same sequence and using the same references. Please ensure all answers are self-contained with no cross-referencing. Only information entered into the appropriate answer boxes (which may be extended as necessary but should not exceed the applicable page count) or in additional documents supplied as requested will be taken into consideration for the purposes of evaluating the Tender.

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- 7.5. Responses must not exceed the pre-set margins and space allocation. Any response in excess of these allocations will be disregarded and will not be evaluated.
- 7.6. Therefore, bullets, tables, graphs and charts in support of your responses are all permitted. Responses must be presented using Arial font size 12 (English Language and black typeface) this includes instances where information may be tabulated as part of the response. The only exception permitted to the font size is for legible illustrative screen shots, graphs and charts, which should be presented within the allocated page limit for the question they are relevant to and must not be embedded separately as this information will be disregarded.
- 7.7. The Tender must be completed using Microsoft Word and MS Excel format. Files submitted in Microsoft Project format and PDF will not be accepted except where stated below at paragraph 7.31.
- 7.8. All acronyms and abbreviations, if used, must be fully explained.
- 7.9. Where a YES, NO or Not Applicable response is required, please click the appropriate YES, NO or Not Applicable statement on the drop down options bar.

**Tender Submission Procedure**

- 7.10. The ITT and any attachments have been specifically designed to be compatible with DWP e-Tendering and e-evaluation requirements and must not, under any circumstance, be altered.
- 7.11. The Tender must be submitted to the Authority using the ePS Portal. A Tender submitted by any other means will not be accepted.
- 7.12. The Tender may be completed and submitted at any time before the Tender submission deadline using the ePS Portal. Instructions explaining how to submit and complete the Tender to the Authority are located within the ePS Portal.
- 7.13. The Bidder is responsible for ensuring that its Tender has been successfully completed and all information uploaded to the ePS Portal prior to the Tender submission deadline.
- 7.14. Please allow sufficient time to submit your Tender, it is recommended that the Bidder allows time for a final check to be undertaken prior to the submission deadline. It will not be possible for you to upload any further information after the Tender submission deadline. IT problems within your own system will not be considered reasonable grounds for late submission.
- 7.15. The Bidder may modify and resubmit its Tender at any time prior to the Tender submission deadline. Tenders cannot be modified by Bidders after the Tender submission deadline. Upon the Tender submission deadline, the Bidder must ensure that it has only submitted a single Tender through the ePS Portal.
- 7.16. Financial information should be submitted in the format requested (MS Excel). Documents which have related financial information should be submitted in GBP (£). Instructions on the ePS Portal will clearly identify the format and where these documents should be uploaded.

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**Labelling your Tender Forms (File Names)**

7.17. The Bidder will be invited to submit responses to online questions and upload a suite of documentation that reflects the requirements of the ITT. It is vitally important that when using the ePS Portal Tenders correctly name any documents and attachments that are required to be uploaded as a response to questions within each of the envelopes.

**Qualification Envelope**

7.18. This envelope contains questions the Bidder may have already answered in setting up their organisation Profile and the answers to those questions will be used to pre-populate your response.

7.19. The Bidder may change these answers so they differ from those saved in their Organisation Profile and save those new answers on their response. These answers will be applied back to their Organisation Profile when the ITT is evaluated by the Buyer.

7.20. The Bidder may also supply different answers to these questions provided in relation to Tenders for other procurements they submit. In this case the response saved to your Organisation Profile will always be the response which is most recently evaluated by the Buyer.

7.21. Where the Bidder does not want to change any information they will be given a prompt to confirm that everything recorded is current and correct.

7.22. Where there is a requirement to upload documents within the envelope, the suggested format is as follows. Please note this is an example and your submission should reflect what is requested in the ITT.

<b>ITT Response required</b>	<b>How your response should be uploaded</b>
Financial and Economic Standing (Regulation 24)  Annex B	Contract title (i.e. supply of widgets), Annex B - Financial & Economic Standing (Because of the complexity of financial accounts we have not uploaded an Annex D however please ensure your uploaded documents are labelled Annex D) 2011/2012 accounts Company Name (i.e. ABC Ltd) 2012/2013 accounts Company Name (i.e. ABC Ltd) (Or 2010/2012 & 2011/2012 accounts if your 2012/2013 accounts are not yet available)

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**Technical Envelope**

7.23. This envelope contains specific questions to which a response is required. It is this information which will enable the Authority to carry out a qualitative evaluation of the proposal. Where there is a requirement to upload attachments to questions within this envelope the suggested format is as follows.

<b>ITT Response required</b>	<b>How your response should be uploaded</b>
Draft Security Plan Annex Y – Draft Security Plan Freedom of Information -Annex Q	Contract title (i.e. supply of widgets) Annex Y - Draft Security Plan Company Name (i.e. ABC Ltd)

**Commercial Envelope**

7.24. This envelope is where the Pricing Proposal should be uploaded. This information should be uploaded as follows.

<b>ITT Response required</b>	<b>How your response should be uploaded</b>
Pricing Proposal Commercial Envelope, Annex S – Pricing Proposal	Contract title (i.e. supply of widgets), Annex S – Pricing Proposal Company Name (i.e. ABC Ltd)

**Data Security**

**Draft Security Plan - (ITT – Technical Envelope & Schedule 6 (Appendix A and B) of the Terms and Conditions)**

- 7.25. Cabinet Office has introduced mandatory requirements relating to data handling, security and information assurance in government contracts. Information must be protected, together with systems, equipment and processes which support its use. Our contractors must provide an appropriate level of security.
- 7.26. The Bidder is required to submit a Draft Security Plan detailing how you will comply with the DWP Security Policy for Contractors. A copy of this document can be found on ['Gov UK - Other DWP procurement and policy documents'](#) and full guidance is provided in the relevant document and in Schedule 6 of the Terms and Conditions. A full Security Plan will be due 20 days after contract award.

**Additional Materials, Documents and Attachments**

- 7.27. No additional documentation should be submitted with a Tender unless specifically requested by the Authority.
- 7.28. Information that forms part of general company literature or promotional brochures will not form part of the evaluation process and should not be submitted.
- 7.29. The Tender should not contain any inserted, pasted or embedded pictures or documents (image files, PDF documents or other Word documents) unless specifically requested by the Authority.

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- 7.30. Any additional documents requested by the Authority must be clearly referenced within the body of the Tender using a unique, un-ambiguous and relevant file name. They must be saved using MS Word, MS Excel, MS PowerPoint, PDF or jpeg formats. No other file formats should be used.

**Tender Clarification (Q&A)**

- 7.31. The Bidder has the opportunity to raise questions about the ITT and request clarification about the requirement. All questions raised must be submitted via the ePS portal by the date specified in the procurement timetable on the portal. The Authority will not consider any clarification questions received after this date.
- 7.32. The Clarification (Question and Answer) log containing all questions and responses will be published on the ePS portal and updated regularly on the date specified in the procurement timetable on the portal. It will be the responsibility of the Bidder to monitor the portal for the latest activity.
- 7.33. The Bidder must ensure they have read all the documentation contained within this ITT (Specification, Terms and Conditions and these Instructions) thoroughly so that questions or clarifications are not raised unnecessarily.
- 7.34. The final date for questions and answers and dissemination allows sufficient time for the Bidder to impact this information before finalising their Tender for submission.

**Acceptance and Return of Tenders**

- 7.35. By issuing the ITT, the Authority is not bound in any way and does not have to accept any Tender.
- 7.36. The Tender, comprising of the information set out in the ITT must be completed and submitted in its entirety to the ePS portal by the stipulated deadline.
- 7.37. The Tender will remain unopened until the deadline for receipt has passed and then it will be opened and logged in accordance with the Authority's procurement procedures. However, should the Bidder submit their Tender before the submission deadline and advise the Authority that they waive the right to further revise their Tender, then the ITT will be closed early and the evaluation process will commence.
- 7.38. The Tender will undergo an initial compliance check to ensure that all information requested has been received. The Tender will be clarified if the complete information requested is not included as part of the Tender documentation.

**Declaration by Tender (Technical Envelope)**

- 7.39. This document is your offer to enter into a contract with the Authority. It is the responsibility of the Bidder to ensure that your final submission corresponds with the information stated on this Declaration Statement, as this will form the basis of your Tender proposal.
- 7.40. This document should also act as a final checklist to confirm that you have submitted all of the required responses to enable a full evaluation of your Tender to take place. If any of the documents are missing at Tender opening stage, your Tender will be classed as non-compliant and a clarification will be raised to ensure all documents are

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provided. Should those clarifications not be successfully addressed, your Tender will not be evaluated, resulting in your disqualification from the procurement exercise.

- 7.41. You will note that this document requires a scanned signature and if your proposal is successful then a “wet signature”/seal (as appropriate) will be required at contract award stage on the contract.

**Tender Clarification**

- 7.42. The Authority may need to clarify details of your Tender and in those instances the Authority will send any questions using the ePS portal to the named person registered on the system, who should arrange for a reply to be provided by the stipulated deadline.

- 7.43. The Authority may seek independent financial and market advice to validate information declared, or to assist in the evaluation.

**Period for which Tenders shall Remain Valid**

- 7.44. Tenders shall remain valid and capable of acceptance for 90 days from the closing date for receipt of Tenders.

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**8. The Evaluation Process**

8.1 The following process highlighted in Paragraphs 8.1 to 8.5 will be used for the evaluation of Tender responses.

**Qualification Envelope (Grounds for Exclusion and Minimum Requirements)**

8.2 The Bidder must meet all of the selection requirements set out in Annex A. Should the Bidder fail to meet all the selection requirements set out in Annex A then the Authority will seek to negotiate with the Bidder to reach a mutually agreeable position as part of the clarification process. If this negotiation fails to reach a mutually agreeable, then the single tender process will cease.

**Evaluation of Technical Envelope (Qualitative Criteria)**

8.3 The Technical Envelope (see Annex B) contains a number of questions for the Bidder to respond to.

8.4 The evaluation of the ITT response will be 100% qualitative.

8.5 The information provided in the Tender proposal will be evaluated against the pre-determined Marking Scheme as stated below:

Mark	Comment
Meets an acceptable quality standard	The Bidder's response has met the required quality standard and comprehensively covers the specified requirements.
Does not meet acceptable quality standard	The Bidder's response has not met the required quality standards and does not comprehensively cover the specified requirements. Further dialogue/clarification required from the Bidder to resolve any deficiencies identified.

8.6 The Bidder should refer to the following paragraphs below for full details of how responses to questions will be evaluated and marked.

8.7 Evaluation of the Qualitative Criteria is a two-step process, comprising of:

- Independent evaluation; and
- Consensus Meeting.

8.8 During the independent evaluation process, each evaluator will separately (i.e. without conferring with other evaluators) scrutinise the quality of answers given by the Bidder in their Tender. Each evaluator will then allocate the mark for the answer in accordance with the Marking Scheme detailed above.

8.9 The Tender Manager will review the marks allocated by the individual evaluators to ensure consistency before facilitating a group consensus marking meeting.

8.10 Should any of the Bidder responses be marked as 'Does not meet an acceptable standard' they will be clarified with the Bidder who will be requested to re-submit their

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Tender with additional detail, in order to provide the Authority with enough information to enable the Bidder response to be marked as 'Meets an acceptable quality standard'.

- 8.11 The Bidder response will be reviewed again following the process set out above, once received. If this further clarification does not meet an acceptable standard no further opportunity will be given to provide further clarification and the single tender process will cease.

### **Evaluation of Commercial Envelope (Financial Criteria)**

- 8.12 The Commercial Envelope (See Annex C for Pricing Proposal) contains a list of pricing and supporting assumption fields for which the Bidder is required to submit a bid for (exclusive of VAT). The Bidder must complete all sections within the Pricing Proposal to be eligible for further evaluation.
- 8.13 As the approved procurement route is a single tender, the following actions will be completed:
- the pricing schedule will be checked for accuracy and compliance with the Instructions to Bidder;
  - the pricing schedule will be cross-checked against the technical envelope for consistency; and
  - the pricing schedule will be cross-checked against the pricing schedule from MSA Phase 2 and questioned if appropriate (i.e. significant increases in costs for the same activities/resources and/or inclusion of one-off costs paid for against the previous MSA Phase 2 contract).
- 8.14 Should any costs which need to be questioned will be raised with the Bidder.
- 8.15 The Authority's Commercial Finance Business Partner will provide financial assurance regarding the Bidder's financial viability, capacity and capability.

### **9. Publication of Contract Award on Contracts Finder**

- 9.1 In line with published Crown Commercial Service guidance on transparency the contract award opportunity will be published on Contracts Finder.

### **10. Authority Complaints Procedure**

- 10.1 The Authority has published a [Commercial Complaints Process](#) for use during competitive procurement.
- 10.2 This process gives details of:
- DWP Commercial Code of Practice – Competitive Tendering;
  - The DWP Commercial Complaints Process;
  - Information to accompany a commercial complaint.

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**ANNEX A - QUALIFICATION ENVELOPE**

- 1 The Qualification Envelope on the ePS portal contains 'Pass/Fail' questions and acts as a doorway for progression to the following stages of the evaluation. Bidders are strongly advised to read and understand the specific guidance provided before responding to these questionnaires.
- 2 In addition to the Qualification Questionnaire Parts 1 and 2 on the ePS portal the Bidder is required to respond to the following additional question detailed under 'Qualification Envelope: 1.13 – Additional Questions'

'Qualification Envelope: 1.13 – Additional Questions'			
Question Number	Question	Max Score	Weighting (%)
[1.13.1]	Do you accept the published Terms and Conditions?	Pass/Fail	N/A
[1.13.2]	Does your pricing proposal fit within the Pricing Cap as contained in Annex C of the Instructions to Bidders?	Pass/Fail	N/A
[1.13.3]	Can you achieve delivery of all specified requirements by 31 March 2020?	Pass/Fail	N/A

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**ANNEX B - TECHNICAL ENVELOPE**

- 1 The following Qualitative questions are designed to test the Bidder's ability to deliver the requirement as set out in the Specification (Schedule 1 of the Terms and Conditions). The Bidder *MUST* answer all questions within the Technical Envelope.
- 2 The Bidder response must clearly demonstrate how they propose to meet the requirements set out in the question and address each element in the order they are asked.
- 3 The Bidder response should be limited to, and focused on each of the component parts of the question posed. The Bidder should refrain from making generalised statements and providing information not relevant to the topic.
- 4 Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas including identifying key sections within responses.
- 5 The Bidder will be marked in accordance with the marking scheme at Paragraph 8.5 of this Instructions to Bidder document.

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**1. Management Plan**

Please describe how you plan to deliver the specified requirements within the specified timescales and how you have, or will ensure you have, the specified competencies in order to show that you are able to deliver the specified requirements.

Your response should include:

- A clear Management Plan which should contain:
  - a time-bound programme of all the activities to be delivered, in line with the specified requirements;
  - details of how the enhanced online toolkit will be tested and evaluated, including recommended QAG approval points; and
  - timescales, deliverables, contractual milestones and resource requirements including key staff
- Your supporting justification of your Management Plan, which must clearly demonstrate how delivery will be managed and show how the specified requirements will be delivered within the specified timescales.
- A description of the competencies your staff resources will possess which clearly justifies how the competencies show that you are able to deliver the specified requirements.

Insert your response in the pre-set, shaded space of the following pages.  
Your response MUST be limited to 2 sides of A4 in Arial font size 12.

The Authority will consider the following questions in evaluating your response:

- Does the Management Plan clearly set out and contain timescales, deliverables, contractual milestones and resource requirements including key staff and are they in line with the specified requirement?
- Does the Management Plan include details of how the enhanced online toolkit will be tested and evaluated, including recommended QAG approval points?
- Does the Bidder's justification of the management plan clearly demonstrate how delivery will be managed and show how the specified requirements will be delivered within the specified timescales?
- Does the response detail the competencies the Bidder's staff resources will possess (including as a minimum those within the Specification) and clearly justify how the competencies show that the Bidder is able to deliver the specified requirements?

**2. Maintaining and refreshing the current mental health online toolkit**

Please describe how you will maintain and refresh the current mental health online toolkit in line with the specified requirements.

Your response should include:

- A description of how you will ensure that the current mental health online toolkit continues to be hosted using the specified URL;
- A description of how you will ensure compliance with the specified IT accessibility standards;

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- A description of how you will periodically review and refresh the current mental health online toolkit in line with the specified requirement; and
- How you will continue to restrict access to those organisations involved in the trial (from Phase 2)

Insert your response in the pre-set, shaded space of the following pages.  
Your response MUST be limited to 2 sides of A4 in Arial font size 12.

The Authority will consider the following questions in evaluating your response:

- Does the response show that the current mental health online toolkit will continue to be hosted on the URL: <https://returntoworkmh.co.uk>?
- Does the response clearly describe how the Bidder will ensure compliance with the specified IT accessibility standards and show how they will be met?
- Does the response clearly describe how the existing content of the current mental health online toolkit will be reviewed and refreshed throughout the contract period and is the periodicity reasonable?
- Restrict access?

**3. Enhancement of existing Mental Health Online Toolkit – Focused Research**

Please describe how you will undertake focused research to inform the design of the enhanced Mental Health Online Toolkit in line with the specified requirements.

Your response should include:

- A description of the focused research to be undertaken, including subject matter experts to be engaged and the value they will add, and the research methods and sources you will utilise;
- An explanation of how you will ensure that the research to be undertaken is appropriately targeted as a minimum to the specified physical health conditions and disabilities and how this will support your planned development and testing activities;
- Details of any other physical health conditions and disabilities you would recommend are incorporated in to the online toolkit and why; and
- Details of all physical health conditions and disabilities to be researched and why they are appropriate.

Insert your response in the pre-set, shaded space of the following pages.  
Your response MUST be limited to 2 sides of A4 in Arial font size 12.

The Authority will consider the following questions in evaluating your response:

- Does the response clearly detail the research to be undertaken, including subject matter experts to be engaged, the value they will add, and the research methods and sources you will utilise?
- Does the response clearly explain how the Bidder will ensure that the research undertaken will be appropriately targeted as a minimum to the specified physical health conditions and disabilities and how this will support the Bidder's planned development and testing activities?
- Does the response clearly detail any other physical health conditions and disabilities the Bidder recommends should be incorporated in to the online toolkit and justifications as to why?

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- Does the response clearly identify all physical health conditions and disabilities to be researched, include those detailed within the Specification and clearly justify why they are appropriate?

**4. Enhancement of existing Mental Health Online Toolkit – Production and Testing**

Please explain how you will produce and test the enhanced Mental Health Online Toolkit to ensure that it is fit for purpose, specifically for use by SMEs and their employees.

Your response should include:

- An explanation of how you will engage with employer and employee representative bodies to ensure you have sufficient insight in order to complete user testing;
- An explanation of how you will ensure that the enhanced online toolkit is fit for purpose for use by SMEs and their employees;
- A description of how you will ensure that insight and feedback from employers and employees will be addressed and incorporated into the enhanced online toolkit;
- Confirmation that testing will only be conducted with organisations based in England; and
- A description of how you will ensure that the online toolkit is fit for purpose, in line with the specified requirements, at the point of handover to the Authority.
- A description of any anticipated risks associated with the design, production and testing of the enhanced online toolkit and mitigation activity you will undertake to manage those risks.

Insert your response in the pre-set, shaded space of the following pages.  
Your response MUST be limited to 3 sides of A4 in Arial font size 12.

The Authority will consider the following questions in evaluating your response:

- Does the response clearly detail how the Bidder will engage with employer and employee representative bodies to ensure the Bidder has sufficient insight in order to complete user testing successfully?
- Does the response clearly explain how the Bidder will ensure that the enhanced online toolkit is fit for purpose for use by SMEs and their employees?
- Does the response clearly describe how the Bidder will ensure that insight and feedback from employers and employees will be addressed and incorporated into the enhanced online toolkit?
- Does the response confirm that testing will only be conducted with organisations based in England?
- Does the response clearly describe how the Bidder will ensure that the online toolkit will be fit for purpose at the point of handover to the Authority and is this in line with the specified requirements?
- Does the response clearly identify risks associated with the design, production and testing of the enhanced online toolkit and associated mitigation activity that the Bidder will undertake to manage those risks?

**5. Summary Report**

Please describe the planned content of your summary report, and how it will meet the requirements set out in the Specification.

Your response should include:

- Details of the content of your planned summary report in line with the specified requirements;

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- An explanation of what worked, what didn't and why (lessons learned) for any given disability or employer group during the development and testing of the enhanced online toolkit, that may help to identify any gaps in current provision.

Insert your response in the pre-set, shaded space of the following pages.  
Your response MUST be limited to 1 side of A4 in Arial font size 12.

The Authority will consider the following questions in evaluating your response:

- Does the response provide details of the content of the Bidder's planned summary report and is this in line with the specified requirements?
- Does the response explain how the Bidder will capture what worked, what didn't and why (lessons learned) for any given disability or employer group during the development and testing of the enhanced online toolkit will be captured, and does the response show that these will help to identify gaps in current provision?

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**ANNEX C - COMMERCIAL ENVELOPE**

Pricing Proposal – To be completed and uploaded to the Commercial Envelope.

As stated at para 3 of the Specification “The Supplier must show that they are able to deliver the specified requirements and submit all invoices for payment by 31 Mar 2020, within the maximum contract value of £83,000 (VAT Ex)”.