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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

Metadata Catalogue Professional Services

**Document owner:** Commercial & Procurement Team, NHS England and NHS Improvement

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# **Introduction**

###### This Invitation to Quote (ItQ) has been prepared by NHS England (the ‘Authority’). The Authority is looking for a Supplier for the provision of Metadate Catalogue Licenses. A full description of the requirement is found in section 2.

###### This procurement exercise is being carried out as an Invitation to Quote.

###### The Authority has taken reasonable care to ensure that the information provided is accurate in all material respects. However, the Bidders attention is drawn to the fact that no representation, warranty or undertaking is given by The Authority in respect of the information provided in respect of this transaction and/or any related transaction.

###### The Authority does not accept any responsibility for the accuracy or completeness of the information provided and shall not be liable for any loss or damage arising directly or indirectly as a result of reliance on this ItQ or any subsequent communication.

###### No warranties or opinions as to the accuracy of any information provided in this ItQ Pack shall be given at any stage by The Authority.

###### Any person considering making a decision to enter into contractual relationships with The Authority or any other person on the basis of the information provided should make their own investigations and form their own opinion of The Authority. The attention of Bidders is drawn to the fact that, by issuing this ItQ, The Authority is in no way committed to awarding any contract and that all costs incurred by Bidder in relation to any stage of the Bid process are for the account of the relevant Bidder only.

###### In accordance with The Authority’s internal financial instructions and general principles applicable to public procurement, The Authority seeks best value for money in terms of the Contract reached with the successful Bidder.

###### The Authority has endeavored, therefore, to express as clearly as possible in this ItQ the terms on which it would propose to contract with the successful Bidder and in particular the obligations, risks and liabilities which it expects to become the responsibility of the successful Bidder.

This document contains the following sections:

* **1. Instructions**
	+ Project Team Details
	+ Timeline
	+ Supplier Clarification Question process
	+ Evaluation Criteria
	+ Scoring
* **2. The Requirement:**
	+ Background Information
	+ Standards and Service Specification
	+ Essential Skills Deliverables
	+ Deliverables
	+ Proposed Terms and Conditions
* **3. Responding to the ItQ**
	+ Bidders Details
	+ Further Bidder Information
	+ Bidders Response
1. Instructions

Project Team Details and Contract Lead

|  |  |
| --- | --- |
| **Name of Team** | Enterprise Architecture and Strategy (Chief Technology Officer Team) NHS Transformation Directorate.  |
| **Name and Title of Contract Lead** | Prashant Trivedi, Senior Lead |

Timeline

|  |  |
| --- | --- |
| **Item** | **Date** |
| ItQ Release Date & Issue on Contract Finder\* | Tuesday 20th September 2022 |
| ItQ Clarification Deadline | Monday 26th September 2022 |
| ItQ Closing Date | Tuesday 4th October 2022 |
| Estimated Award Date | Friday 21st October 2022 |
| Estimated Contract Commencement Date | Monday 24th October 2022 |

Supplier Clarification Question Process

All clarification questions relating to this ItQ must be submitted via the procurement portal ([Health Family Single eCommercial System](https://health-family.force.com/s/Welcome)) within the timeframe prescribed in table above. NHS England will aim to respond to all clarification questions received within 2 working days of the date received.

All clarification questions received via other routes will not be reviewed and responded to.

**Please Note: -** To ensure an open and fair process is followed, all bidders will receive a copy of all question(s) and answer(s).

Evaluation Criteria

The purpose of evaluation in the procurement process is to establish which supplier(s) have submitted the best quotation; ensuring that the assessment of quotes is undertaken in a transparent, fair and consistent manner so that an effective comparison can be made.

The Authority, reserves the right to accept or reject all or any part of the quotation if you have failed to provide the information requested in this quotation or you have submitted any modification or any qualification to the terms and conditions of contract.

The Authority does not bind itself to accept the lowest priced, or any quotation, nor guarantee any value or volume and shall not be liable to accept any costs you have incurred in the production of your quotation.

The Authority will check each quotation and submission for completeness and compliance with the requirements in this Invitation to Quote document, thus, you should ensure that you carefully examine this document in full.

Quotes will be evaluated on the following Quality and Costs basis.

|  |  |
| --- | --- |
| **Section** | **Weighting (%)** |
| Technical/Quality | 60% |
| Sustainability and Social Value | 10% |
| Commercial | 30% |

A weighted scoring system will be applied to the response, the high-level evaluation criteria are given below:

|  |  |
| --- | --- |
| **Question** | **Weighting (%)** |
| 1. Define what skills and experience you have regarding open APIs and connecting the various data sources to extract and consume the metadata?
 | 20% |
| 1. What experience do you have managing workshops and consultations to develop metadata product configuration and proof of concepts in an open process?
 | 10% |
| 1. Define what skills and experience you have in working with healthcare bodies to define and implement metadata based data discovery and interfaces?
 | 10% |
| 1. Provide at least one example of where you have implemented or supported the implementation of an interoperable metadata solution with other system suppliers?
 | 10% |
| 1. Define your project methodology and your governance structure?
 | 5% |
| 1. Provide a minimum of two profiles or CVs of staff with relevant skills and experience? What is their availability during the work to be undertaken?
 | 5% |
| 1. Consider the value delivered as part of this procurement which goes wider to improvements to the economic, social and environmental well-being of the local area. How will you consider equality and diversity in the provision and operation of your services?
 | 10% |

**Scoring**

**Bidder information**

The ‘Bidders Detail’ will be ‘For Information Only’ and not scored.

The ‘Further Bidder Information’, will be given either a ‘Pass/Fail’ for each section.

**Quality**

The Authorities evaluation system is based on the familiar “weighted scoring approach”, in which the officer scores responses to the quality questions according to a pre-agreed scoring system 0-4 (see table below). The scores for the sections are then added together to give a total quality score for the quotation response.

| **Score** | **Interpretation** |
| --- | --- |
| 4Excellent | The Bidder’s response provides full confidence that the Bidder understands and can deliver the Requirements well and addresses all of the requirements set out in the question.   |
| 3Good | The Bidder’s response provides a good level of confidence that the Bidder understands and can deliver the services and the Bidder's response addresses all or most of the requirements set out in the question.  |
| 2Satisfactory | The Bidder’s response provides a satisfactory level of confidence that the Bidder understands and can deliver the services and the Bidder's response addresses at least some of the requirements set out in the question. However, the response is lacking in some areas. |
| 1Poor | There are weaknesses (or inconsistency) in the Bidder’s understanding of the services and/or Bidder's response fails to address some or all of the requirements set out in the question. |
| 0Unacceptable | No response and/or information provided is deemed inadequate to merit a score. |

**Scoring Cost**

The financial weighted score is calculated by using the following formula:

Bidders Price Weighted Score = Lowest Total Cost offered Bidder Total Cost

 x (30% weighting)

(Lowest Total Cost divided by Bid Total Cost multiplied by 30)

The financial score will be calculated to two decimals places.

Therefore, the bidder who submits the lowest compliant bid (based on the pricing model created for evaluation purposes) will receive the full [30]% available.

The capped maximum bid price is **£48,750**. Quotations received that exceed the capped maximum bid price will not be evaluated and will be disqualified.

# **The Requirement**

The Requirement is detailed below which provides background to the project/business need, the standards or specification required alongside the essential supplier skills and the objectives of the requirement.

**Background Information:**

|  |
| --- |
| *This initiative is the building block to support the data discovery via metadata which is available across the system including the ICSs. The metadata catalogue will be an online cloud-based product where users could upload metadata and this metadata is available for other users to consume. This will enable users to utilise the data which is already available in the NHS for purposes of providing better clinical care, improving service, better care coordination and research.**NHSE has created the experimental version of the Metadata catalogue and we now wish to support the implementation of the tool across the 3 Integrated Care System (ICS) footprint to enable system wide improved access to Metadata. The metadata catalogue must support the W3C DCAT standard.**The Data Architecture commitments of the* [*draft data strategy*](https://www.gov.uk/government/publications/data-saves-lives-reshaping-health-and-social-care-with-data-draft) *are that, a Chief Technology Officer, technical architect, commissioner, provider or standards lead, will:** *develop the data orchestration layer and metadata catalogue which allows the data discovery and data flows supported by the APIs across the data sources in the health and social care system*
 |

**Standards and Service Specification:**

|  |
| --- |
| *The key delivery items are:-*1. *Collection of metadata for enabling data discovery by sharing metadata on the catalogue product.*
2. *Configuration of the metadata product to cater to the needs of the 3 ICSs and scalable to wider rollout (42 total ICS)*
3. *Cloud infrastructure provisioning to allow the metadata catalogue to be published on the web and collates and shares the metadata provided by the data sources including the Arms Length Bodies (ALBs) and the ICSs within the NHS.*
 |

**Essential Skills:**

|  |
| --- |
| **The supplier will need to show track record of:**1. Developing realistic project plans and delivery of metadata solutions and benefits. Specifics around Metadata solution Subject Matter Expertise (SME) are noted in the evaluation criteria. 2. Participation in project team meetings to ensure delivery items are on track with any deviations being escalated and highlight any issues3. Ability to identity key stakeholders within the 3 chosen ICSs who are key to success of delivery.4. Delivering workshops with ICSs to understand ‘as is’ state and ‘to be’ state. 5. Preparing final engagement outcome report, |

**Deliverables**:

|  |
| --- |
| 1. Each of the in scope ICSs should be able to populate their metadata (i.e. tech metadata, operational metadata, business metadata, etc) integrated to allow automatic updates
2. The in scope ICSs metadata should be interoperable and visible within a single platform
3. Ensure metadata is published and presented in a consistent format for users to understand:
	1. What dataset is available
	2. Who can access data
	3. Quality of dataset
	4. Technical attributes of data
	5. Provenance of dataset
	6. Method of accessing data
	7. Data controller and key contact
4. Solution should be scalable to roll out to all 42 ICSs
 |

**Proposed Terms and Conditions**

The proposed terms and conditions for this engagement are the NHS Standard Terms and Conditions

of [goods, services, goods & services]: Purchase Order Version.

No amendments shall be considered or accepted in relation to the Terms and Conditions. Failure to accept the terms will result in disqualification.

These T&Cs are available to view here:

<https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/681016/NHS_TERMS_AND_CONDITIONS_FOR_THE_PROVISION_OF_SERVICES__PO_VERSION_.docx>

The Purchase Order will serve as the contract.

1. Responding to ItQ

###### When responding to this ItQ, Bidders must ensure that their Bid covers all the information required. Bidders must submit their Bids within the Authority’s procurement portal ([Health Family Single eCommercial System](https://health-family.force.com/s/Welcome)) set out in the "Supplier Response Form". Failure to do so may render the response non-compliant and it may be rejected.

### In evaluating Bids, the Authority will only consider information provided in the Supplier Response Form.

### Bidders should not assume that the Authority has any prior knowledge of the Bidder, its practice or reputation, or its involvement in existing services, projects or procurements.

### If there are any questions that do not apply to a Bidder, please answer with a N/A and explanation where appropriate.

### Where any section of the ItQ indicates a word limit, any response will be reviewed to that word limit and any additional information beyond that word limit will not be considered. Bidders must provide a word count for each question response.

###### The Authority may at its own absolute discretion extend the Deadline for receipt of Bids specified in the timetable. Any extension to the Deadline granted under this paragraph will apply to all Bidders.

###### Bids must be submitted via the Authority’s procurement portal ([Health Family Single eCommercial System](https://health-family.force.com/s/Welcome)) no later than the ItQ submission Deadline specified in ‘Timetable’. Bids may be submitted at any time before the Deadline.

###### Bids received before this Deadline will be retained unopened until the opening date.

###### The Bid and any documents accompanying it must be formatted in Word or Excel as appropriate and be in the English language.

###### Price and any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Bid pricing must be provided excluding Value Added Tax (VAT).

Bidders Details:

The following is an outline of what will be required and found on Atamis. Please complete this on the Atamis portal directly.

*Please ensure a response is provided for all the sections below.*

|  |  |
| --- | --- |
| *Company Name* |  |
| *Company Address* |  |
| *Company’s representative name and title* |  |
| *Contact telephone number* |  |
| *Email address* |  |
| *Address for correspondence* |  |
| *Date of Submission* |  |
| *Company Registration Number* |  |
| *VAT Registration Number* |  |

# Further Bidder Information:

*Please ensure a response is provided for all the questions below.*

|  |  |  |
| --- | --- | --- |
| ***1.*** | *Has your organisation met all its obligations to pay its creditors and staff during the past year?* |  |
| ***2.*** | *If your answer to the above is No, have you rectified the situation resulting in your organisation now being able to pay its creditors and staff?* |  |
| ***3.*** | *Is your company or any group company (your Organisation) or are any of the directors/partners/proprietors in a state of bankruptcy, insolvency, compulsory winding up, and receivership, composition with creditors or subject to relevant proceedings?* |  |
| *4.* | *Please confirm that data is stored in line with the General Data Protection Regulations 2018 where applicable* |  |
| *5a.* | *Please confirm that you accept NHS England’s Purchase Order Terms and Conditions in full, with no modifications. This offer and any contract arising from it shall be subject to these Terms and Conditions and all other items or instructions as issued in this bidder response.*  |  |
| *5b.*  | *Please confirm that you accept that any modifications to the Terms and Conditions will be rejected and may result in the bid being rejected.*  |  |
| *6*. | *Please confirm that all invoicing shall be processed through Tradeshift in line with NHS England and Improvements processes.* |  |

Bidder’s Response

Please ensure a response is provided for both the Quality (A) and Commercial (B) sections in the portal by downloading the attachments and reuploading once completed.

1. Quality

The questions below are for reference only and will be found within Atamis.

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 1** |  | **Question % Weighting** | 20% |
|  |  |
| Define what skills and experience you have regarding open APIs and connecting the various data sources to extract and consume the metadata? |
| **Supplier Response** |
| The maximum total word count for this section is 500 words |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | 10% |
|  |  |
| What experience do you have managing workshops and consultations to develop metadata product configuration and proof of concepts in an open process? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 3** |  | **Question % Weighting** | 10% |
|  |  |
| Define what skills and experience you have in working with healthcare bodies to define and implement metadata based data discovery and interfaces? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |
| **Question 4** |  | **Question % Weighting** | 10% |
|  |  |
| Provide at least one example of where you have implemented or supported the implementation of an interoperable metadata solution with other system suppliers? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |
| **Question 5** |  | **Question % Weighting** | 5% |
|  |  |
| Define your project methodology and your governance structure? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |
| **Question 6** |  | **Question % Weighting** | 5% |
|  |  |
| Provide a minimum of two profiles or CVs of staff with relevant skills and experience? What is their availability during the work to be undertaken? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |
| **Question 7 – Social Value**  |  | **Question % Weighting** | 10% |
|  |  |
| Consider the value delivered as part of this procurement which goes wider to improvements to the economic, social and environmental well-being of the local area. How will you consider equality and diversity in the provision and operation of your services? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |

B) Commercial

|  |  |
| --- | --- |
| **Commercial** |  |
|  |  |
| Bidders should note: the capped maximum bid price is £48,750. Quotations received that exceed the capped maximum bid price will not be evaluated and will be disqualified.  |
| Please provide a cost breakdown to undertake the work in the ‘Supplier Response’ box below. Your breakdown should also include the total cost exclusive of VAT to the Authority. **Suppliers please download the Commercials Excel Sheet, complete it and upload it as an attachment to your proposal on Atamis. Please do not add pricing here.**  |

**C) Confirmation**

|  |  |
| --- | --- |
| **Confirmation** |  |
|  |  |
| Please provide an electronic signature with name and contact details as confirmation the detail submitted is correct and agree to the *NHS England’s Purchase Order Terms and Conditions in full as outlined in ‘Point 5 Further Bidder Information’* |
| **Supplier Response** |
| *Electronic Signature Insert …………..**Name:**Job Title:**Date:* |