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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

Data for Research and Development Programme – Evaluation Partner

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

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**Document History**

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| --- | --- | --- | --- | --- |
| Version | Date | Status | Key Change Made | Author/s |
| 1 | 24/08/23 | Finalisation | Draft Updated | HT |

# **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 evaluation services to the Data for Research and Development Programme commencing in Q2 of 23/24 and running until 31/03/25. A full description of the requirement is found in section 3.

###### 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 ITT 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 Tender 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:

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

1. Instructions

Project Team Details and Contract Lead

|  |  |
| --- | --- |
| Name of Team | Data for Research and Development Programme |
| Name and Title of Contract Lead | Rebecca Cosgriff, Deputy Director of Data for Research |

Timeline

|  |  |
| --- | --- |
| **Action** |  |
| ITQ Release Date & Issue on Contract Finder\* | 29.02.2024 |
| ITQ Clarification Deadline | 08.03.2024 |
| ITQ Closing Date | 11.03.2024 - 12pm |
| Evaluation | 12.03.2024 |
| CAR approval | 14.03.2024 – 21.03.2023 |
| Estimated Award Date | 18.03.2024 - 25.03.2024 |
| Estimated Contract Commencement Date | 19.03.2024 - 25.03.2024 |

The timeline is indicative and may be subject to change.

Supplier Clarification Question Process

All clarification questions relating to this ITQ must be submitted via the procurement portal route (Atamis) within 5 calendar days of receiving the ITQ. Clarification questions received after this time will not be responded to. All Clarification questions will be responded to within 5 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 the 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  Including Sustainability and Social Value | 70% |
| Commercial | 30% |

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

|  |  |
| --- | --- |
| **Question** | **Weighting (%)** |
| 1. *How do you intend to achieve the Programme's deliverables for evaluation, benefits realization and benefits profiling/reprofiling? Please provide details of how you will baseline the achievement of benefits to date?* | 25% |
| 1. *How do you meet the essential skills requirements? Please provide examples of having delivered similar work previously and the nature of the products produced* | 15% |
| 1. *How do you meet the standards and service specifications requirements?* | 10% |
| 1. *How will you meet the delivery timetable and how will you ensure this will be achieved?* | 10% |
| 1. *How will your appointment to this work help to generate social value for the UK research and development community?* | 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** |
| --- | --- |
| 4  Excellent | The Tenderer’s response provides full confidence that the Tenderer understands and can deliver the Requirements well and addresses all of the requirements set out in the question. |
| 3  Good | The Tenderer’s response provides a good level of confidence that the Tenderer understands and can deliver the services and the Tenderer's response addresses all or most of the requirements set out in the question. |
| 2  Satisfactory | The Tenderer’s response provides a satisfactory level of confidence that the Tenderer understands and can deliver the services and the Tenderer's response addresses at least some of the requirements set out in the question. However, the response is lacking in some areas. |
| 1  Poor | There are weaknesses (or inconsistency) in the Tenderer’s understanding of the services and/or Tenderer's response fails to address some or all of the requirements set out in the question. |
| 0  Unacceptable | 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:

Tenderers Price Weighted Score = Lowest Total Cost offered Tenderer Total Cost

x (% weighting)

(Lowest Total Cost divided by Tender 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 [x]% available.

# **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:**

|  |
| --- |
| The Data for Research and Development Programme aims to make the UK the best place in the world to undertake clinical and wider life sciences research to ensure the UK public can benefit from a pipeline of data driven innovation to improve the health of the nation.  There is a strategic imperative for the Programme to robustly demonstrate the realisation of the benefits defined in the Programme Business Case (PBC).  The Programme is seeking to secure external and independent subject matter expertise (SME) to support benefits profiling for future iterations of the PBC and the next Spending Review (SR).  The Programme is looking to procure support to define a process for the capture of metrics concerning benefits and a methodology for the realisation of those benefits; together with the initial production of quarterly reports measuring benefits realisation. progress. This support should be in place within 6-8 weeks of the commencement of the contract and run until the Programme's conclusion in Q4 of 2024/25.  The deliverables for the external partner comprises the below:  Benefits profiling, to include:  i) Development of benefits for the next SR period both stand alone and integrated with this SR period benefits  ii) Rebaselining of benefits in the event of a re-prioritisation by the Programme.  iii) Working closely with the Programme to provide input on benefits to be included in a refresh of the Programme business case.  Delivery dates will be agreed in life however as part of this ITQ, a template plan should be provided to outline the approach with estimated timescales where practical. |

**Standards and Service Specification:**

|  |
| --- |
| Methods include:   1. Literature review: published background documents (including the Programme Business case and relevant strategies and plans), internal NHSE working documents (initial outline case, proposals, user research) as well as documents from our delivery partners. 2. Modelling and analysis: A review of the existing benefits within the Programme Business case and a baseline assessment of current performance against these. 3. Stakeholder engagement: Meetings and workshops with key stakeholders across NHSE/I, Office of Life Sciences, DHSC Science, Research and Evidence team, NIHR, ICSs, Genomics England, UK Biobank, and Our Future Health.   We expect the proposed team to work closely with the Data for Research and Development Programme in an agile way to ensure alignment and maintain pace. |

**Essential Skills:**

|  |
| --- |
| 1. Significant experience of delivering evaluation services and benefits realisation methodology to the public sector. 2. Ability to deliver. Some of the deliverables have short timelines, with a need to start immediately upon contract award, rapidly establish a suitable project team, and the ability to draw on a wider pool of resource as needed. The requirement to commit to sporadic but regular and scheduled work up to 2025 is key. 3. Ability to rapidly understand and bring together large amounts of information to create a coherent narrative and develop a framework on benefits that non-experts can adhere to. 4. An in-depth existing understanding of the health research and data landscape in England. |

**Deliverables**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| |  |  |  | | --- | --- | --- | |  | **Benefits profiling** |  | |  |  |  | | i | Development of benefits for the next SR period both stand alone and integrated with this SR period benefits | 4-6  weeks | | ii | Rebaselining of benefits in the event of a re-prioritisation by the Programme | 4-6  weeks | | iii | Working closely with the Programme to provide input on benefits to be included in a refresh of the Programme business case. | 4-6 weeks | |  |  |  | |

**Proposed Terms and Conditions**

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

There are available to view on <https://www.gov.uk/government/publications/nhs-standard-terms-and-conditions-of-contract-for-the-purchase-of-goods-and-supply-of-services>.

The Purchase Order will serve as the contract.

1. Responding to ITQ

###### When responding to this ITQ, Bidders must ensure that their Tender covers all the information required. Bidders must complete their Tenders within the Authorities procurement portal (Atamis) set out in the "Supplier Response Form". Failure to do so may render the response non-compliant and it may be rejected.

### In evaluating Tenders, 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 Tenders specified in the timetable. Any extension to the Deadline granted under this paragraph will apply to all Bidders.

###### Tenders must be submitted via the Authorities procurement portal (Atamis) no later than the ITQ submission Deadline specified in ‘Timetable’. Tenders may be submitted at any time before the Deadline.

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

###### The Tender 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. Tender pricing must be provided excluding Value Added Tax (VAT).

Bidders Details:

*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.*  [*https://www.gov.uk/government/publications/nhs-standard-terms-and-conditions-of-contract-for-the-purchase-of-goods-and-supply-of-services*](https://www.gov.uk/government/publications/nhs-standard-terms-and-conditions-of-contract-for-the-purchase-of-goods-and-supply-of-services) |  |
| *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 on Atamis by downloading the attachments and reuploading once completed.

1. Quality

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 1** |  | **Question % Weighting** | [25 %] |
|  |  | |
| *How do you intend to achieve the Programme's deliverables for evaluation, benefits realization and benefits profiling/reprofiling? Please provide details of how you will baseline the achievement of benefits to date?* | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 1,000 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | [15 %] |
|  |  | |
| *How do you meet the essential skills requirements?*  *In answering this question, please provide evidence of your previous experience of delivering benefits assessment work* | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 500 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 3** |  | **Question % Weighting** | [10 %] |
|  |  | |
| *Please provide evidence of how you meet the standards and service specifications requirements?* | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 500 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 4** |  | **Question % Weighting** | [10 %] |
|  |  | |
| *Please demonstrate how you will meet the delivery timetable for both work packages and how you will ensure the requirements will be achieved?* | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 500 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 5** |  | **Question % Weighting** | [10 %] |
|  |  | |
| *Please provide examples of how your appointment to this work will help to generate social value for the UK research and development community.* | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 500 | | | |

B) Commercial

|  |  |
| --- | --- |
| **Commercial** |  |
|  |  |
| *Please provide a cost breakdown to undertake the work in the ‘Supplier Response’ box below. Your breakdown should include the total cost exclusive of VAT to the Authority.*  *Please be aware that MAX budget for this project is £49k, bids above this will disqualified.* | | |
| **Supplier Response** | | |
| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | |  | *Deliverables* | *Roles* | *Number of Days* | *Day Rates* | *Cost* | | *1)* | *Development of benefits for the next SR period both stand alone and integrated with this SR period benefits* |  |  |  |  | | *2)* | *Rebaselining of benefits in the event of a re-prioritization by the Programme.* |  |  |  |  | | *3)* | *Working closely with the Programme to provide input on benefits to be included in a refresh of the Programme business case.* |  |  |  |  | |  |  |  |  |  |  | | *Total Costs* |  |  |  |  |  |   *Please use the template provided.* | | |

**C) Confirmation**

|  |  |
| --- | --- |
| **Confirmation** |  |
|  |  |
| Please provide an electronic signature with name and contact details as confirmation the detail submitted is correct and agree to the *Authorities Purchase Order Terms and Conditions in full as outlined in ‘Point 5 Further Bidder Information’*:  (If using Atamis, this shall be completed electronically) | | |
| **Supplier Response** | | |
| *Electronic Signature Insert ………**…..*  *Name:*  *Job Title:*  *Date:* | | |