**Request for Quotation**

**Knowledge Management, Strategy Development and Procedure Implementation Contract**

**July 2016**

1. **Introduction**
   1. HS2 Limited is inviting suppliers to provide a quotation for the Knowledge Management (KM), Strategy Development and Procedure Implementation contract commencing in August 2016 for a duration of 3 months or until the requirements have been satisfactorily provided.
2. **Contract**
   1. The term of this contract is likely to be 3 months with an option to extend to a further 6 months to support the delivery of the KM capability.
   2. The estimated contract value is between £30,000 and £50,000.
   3. This contract will be subject to HS2’s standard terms and conditions.
   4. The contract documents will include HS2 standard terms and conditions, this Request for Quotes, the supplier’s proposal and quotation, and any supplier clarifications.
   5. Any Contract arising from this Procurement shall be subject to English law and the exclusive jurisdiction of the courts of England.
3. **Scope and Requirements**
   1. HS2 requires the supplier to provide support to implement a knowledge management capability in HS2. Knowledge Management is seen as key enabler to project delivery and maximising the value delivered by the project both in efficiency and overall benefit terms. This work aims to establish a robust and sustainable knowledge management capability which is part of organisational BAU, and reflects the people, systems, processes and culture of HS2.
   2. The successful supplier is required to provide the following services:

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| Requirement |
| 1. Review, check and challenge HS2 Knowledge and Value Management strategies and procedures. |
| 2. Design the initiation of the HS2 Learning Legacy. |
| 3. Engage with technical specialists in HS2 to ensure that technical data requirements and existing management systems are adequately addressed. |
| 4. Specifically address interfaces with external stakeholders in the HS2 supply chain and similar projects. |
| 5. Design a KM procedure to support HS2 strategic objectives. |
| 6. Identify an effective implementation plan and manage stakeholder expectations. This should include detailed approaches to supporting the relocation of HS2 from London to Birmingham, lessons from MWCC procurement and establishing a process for knowledge transfer from Phase 1 to Phase 2. |
| 7. Attend selected project meetings, providing knowledge management perspective. |
| 8. Provide detailed transition to BAU plan. |

Deliverable are to include the following:

* + 1. KM Strategy improvement plan.
    2. KM Procedure implementation plan.
    3. KM capability implementation plan, with specific reference to relocation, lessons from procurement and Phase 1 to Phase 2 knowledge transfer.
    4. Risk and Issues log.

1. **Personnel**

The successful supplier will be required to have the following knowledge, skills and experience:

* 1. Previous experience of knowledge management procedural implementation in a large scale complex infrastructure project environment, providing specialist advice to internal stakeholders and advice on supply chain dependencies.
  2. Knowledge of approaches and techniques, preferably with experience of applying knowledge management concepts and procedures to large scale projects.
  3. Knowledge of developing systems requirements to support effective knowledge management and continuous improvement.
  4. Knowledge of dependencies on Value Management and using knowledge to optimise business value.
  5. Proven ability to deliver sustainable capabilities (people, processes and systems) to clients.
  6. Highly organised with strong facilitation and communication skills, with the ability to tactfully challenge existing approaches at all levels to support best practice knowledge management.

1. **Procurement Process**
   1. This procurement is being conducted in accordance with HS2’s open procurement procedure and the EU Treaty Principles.
   2. This opportunity will be advertised on Contracts Finder.
   3. The timetable for procurement is as follows:

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| --- | --- |
| Stage | Date |
| Issue RfQ | 27 Jul 16 |
| Deadline for receipt of quotes and proposals | 18 Aug 16 |
| Evaluations completed | 22Aug |
| Contract award | 25 Aug |
| Mobilisation | 30 Aug |
| Target Commencement date | 5 Sep |
| KM and VM strategy review | 19 Sep |
| Stakeholder Mapping and engagement strategy | 19 Sep |
| KM Procedure agreed | 17 Oct |
| KM implementation plan | 31 Oct |

1. **Instructions to Quote**
   1. Suppliers are required to provide a proposal and quotation to Phil Oxley, Head of Efficiency and Value Management at [darrell.pulver@hs2.org.uk](mailto:darrell.pulver@hs2.org.uk) by no later than 17:00 hours on Thursday 18th August 2016.
   2. Proposals are required to include the following sections with reference to the requirements set out in section 3 and 4 herein:

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| Requirement | Format of response | Additional information |
| 1. Review, check and challenge HS2 Knowledge and Value Management strategies and procedures. | Method statement explaining approach, including 2 exemplar case studies. | Demonstrate awareness of best practice from multiple major projects. Engage with Business Transformation teams to align work with other change programmes. |
| 2. Design the initiation of the HS2 Learning Legacy. | Method statement explaining approach, including how learning from ODA, Crossrail and Thames Tideway should be considered. | Should include internal legacies within HS2 project life cycle. |
| 3. Engage with technical specialists in HS2 to ensure that technical data requirements and existing management systems are adequately addressed. | Method statement explaining approach taken to gain buy in and incorporate requirements. Two exemplar case studies should be provided. | Key interfaces and how synergies can be optimised should be explained. |
| 4. Specifically address interfaces with external stakeholders in the HS2 supply chain and similar projects. | Method statement including 2 case studies. | Tender responses for Phase 1 work will not have been provided at this stage so a generic approach to engaging with the supply chain should be provided. |
| 5. Design a KM procedure to support HS2 strategic objectives. | Method statement explaining approach, including 2 exemplar case studies. |  |
| 6. Identify an effective implementation plan and manage stakeholder expectations. This should include detailed approaches to supporting the relocation of HS2 from London to Birmingham, lessons from MWCC procurement and establishing a process for knowledge transfer from Phase 1 to Phase 2. | Method statement explaining approach, including 2 exemplar case studies. | Specifically address interfaces with external stakeholders in the HS2 supply chain and similar projects. |
| 7. Attend selected project meetings, providing knowledge management perspective. |  |  |
| 8. Provide detailed transition to BAU plan. | Method statement explaining approach, including 2 exemplar case studies. | To identify end to end implementation and RACI. |

* 1. A quotation is required stating a single fixed price for delivery of the service exclusive of VAT in GBP, including a breakdown by role, day rates and number of days.
  2. A signed and completed Conflict of Interests Declaration form is required.
  3. A signed and completed Non-Disclosure Agreement is required.
  4. Submissions are to be provided in text format not less than 11 point font and 1 page per requirement with a total length not to exceed 10 pages.

1. **Evaluation**
   1. The proposals and quotations will be evaluated on the basis of Most Economically Advantageous Tender and will be scored on the basis of a quality to price ratio of 70:30.
   2. All quotes and proposals received must be in accordance with the instructions provided. Any quote or proposal received that are not, may be rejected.
   3. The evaluation panel may contact suppliers to obtain responses to any clarification questions they may have. Clarification responses will be documented and will form part of the contract.
   4. The total quality score will be calculated by adding the scores awarded for the following quality criteria:

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| --- | --- |
| **Criteria** | **Maximum score** |
| Experience in delivering KM capability in complex major infrastructure programmes (>£5bn capital expenditure). | Pass / Fail |
| Best practice and innovation included in approach | 30 |
| Stakeholder engagement approach | 15 |
| Approach to interfacing approaches | 10 |
| Long term sustainability of approach | 15 |
| Total | 70 |

* 1. Proposals that do not meet the essential criterion may be rejected.
  2. The total price score will be calculated on the basis of lowest price received ÷ price being evaluated x maximum price score available.

For example if the maximum price score available is 30, the lowest price received is £20,000 and the price being evaluated is £30,000 then the price score will be 20,000 ÷ 30,000 x 30 = 20.

* 1. Quotes that are regarded as abnormally low (more than 25% below than the average price received) or abnormally high (more than 25% above than the average price received) may be rejected. HS2 will contact the supplier to clarify the reason for the abnormally low or high quote and may reject the quote and proposal if the reason provided does not satisfy the HS2 evaluation panel.
  2. The quality score will then be added to the price score to provide a total evaluation score out of 100.
  3. The supplier with the highest total evaluation score will be awarded the contract.

1. **Award**
   1. Once the evaluation has been completed and a contract award decision has been approved, HS2 will notify all participating suppliers of the outcome.
   2. Unsuccessful suppliers will be notified by email and will be provided with their evaluation scores, the evaluation scores of the successful tenderer and feedback regarding their proposal and quote.
   3. The successful supplier will be notified by email and will be provided with their evaluation scores. HS2 will then execute the contract and will provide the supplier with a purchase order number.
2. **Contact**
   1. If you have any queries regarding this Request for Quotation, please contact Mel Maris at [melanie.maris@hs2.org.uk](mailto:melanie.maris@hs2.org.uk) .