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**Invitation to Tender**

**Contract provision: Organisational Development (OD)**

ATAMIS REF:C102345

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Distributed to** | **Reason for issue** | **Version #** | **Issued by** | **Date** |
|  | Open Procedure | 1 |  |  |

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# Part 1 Itt

# (Background and instructions)BACKGROUND TO THE PROCUREMENT

## Barnet, Enfield and Haringey Mental Health NHS Trust (BEH) is a large provider of integrated mental health in Barnet, Enfield and Haringey and also community health services in Enfield.

## BEH provide specialist mental health services to people living in the London boroughs of Barnet, Enfield and Haringey, and a range of more specialist mental health services to our core catchment area and beyond. Following the transfer of Enfield Community Services in 2011, we also provide the full range of child and adult community health services in Enfield and are increasingly integrating these with our mental health services to provide a range of more holistic services.

## Since October 2020, the Trust has been the lead-provider for the North London Forensic Consortium. Under a contract worth c£150m with NHS England the Trust has the delegated responsibility for commissioning Low and Medium Secure Forensic Services for the population of North London, working in partnership with 4 other NHS providers.

## BEH serve a population of 1.2 million, employ more than 3,300 staff, and operate from over 20 main sites in the community.

## Providing equality of opportunity for patients, their carers and our staff is a central element of our pursuit of excellence in care provision.

## 

## We are committed to the elimination of unlawful and unfair discrimination and value the differences that a diverse workforce brings to the organisation.

## We aim to be a fair employer and strive to achieve equality of opportunity for all, creating inclusive workplace environments where everyone can work effectively towards the provision of better healthcare. As a Trust we have a comprehensive policy, setting out how it will work to deliver high quality services to all in fair and equitable ways.

# PURPOSE OF THis document

## This is a competitive procurement conducted in accordance with the Public Contract Regulations 2015 following the Open Procedure.

## BEH invites you to respond to this ITT by completing and submitting a response in accordance with the requirements of this document.

## The objective of the ITT evaluation process is to assess the responses and select a supplier to provide the services to BEH.

## Your response will be checked for completeness and compliance with the requirements of this ITT. BEH reserves the right, at its absolute discretion, to reject any incomplete or non-compliant response which may prevent you from further participation in this procurement.

## BEH reserves the right to exclude you, at any stage of this procurement process, if it becomes aware of any omission or misrepresentation in your ITT response.

## The evaluation criteria used in this procurement comprise a combination of both financial and non-financial factors and will consider:

### criteria for the rejection of a bidder, specifically their status having regard to Public Contracts Regulations 2015;

### economic and financial standing – in accordance with Regulation 24 of the Regulations, BEH requires each bidder to meet certain minimum standards of economic and financial standing to participate in this procurement;

### a bidder’s technical or professional ability in accordance with Regulation 25 of the Regulations by requiring evidence of:

#### a successful track record of providing similar services to those listed in this ITT;

#### their capacity and capability, involving an assessment of the totality of resources and competences available to the bidder;

#### the completeness and suitability of the solution or proposal put forward in response to this ITT .

## You should refer to the evaluation process that will be applied by BEH to all responses at paragraph 6 below for details of the questions, the marking scheme, scores and weightings.

## BEH reserves the right to seek third party independent advice or assistance to validate information you submit and/or to assist in the evaluation process.

## BEH reserves the right to conduct site visits, hold interviews and request presentations at any time during this procurement process.

# REQUIREMENTS

## The detailed Specification for the required Services covered by this Procurement are set out within the [specification section](#_Part__2) of this document.

## Common Service Attributes

### Business Operations

Services will be required to be provided for a range of business operating regimes including:

* primarily business hours with out-of-hours event/emergency support;

### Business Continuity

Contractors will be required to offer resilient systems supported by business continuity, disaster recovery and rapid deployment services in respect of the services they offer to the Trust.

### Service Management

Contractors are expected to be capable of providing fully supported services with appropriate helpdesk support were relevant.

### Sustainability

The sustainability of services offered under the resultant contract will be a component part in reducing our carbon footprint, not only in energy consumption but also in enabling further wider reduction in sustainability impacts. In addition, the sustainability of your sources of supply should be a key consideration. As such, sustainability will be a common theme throughout the lifetime of the Contract.

# procurement timEtable

1. An outline timetable for this procurement is set out below. This is intended as a guide and whilst BEH does not intend to depart from the timetable, it reserves the right to do so at any stage.
2. **Table1**

|  |  |
| --- | --- |
| 1. **Date** | 1. **Activity** |
| 1. 06/09/2022 | 1. Publication of the Invitation to Tender Document |
| 1. 06/09/2022 | 1. Open Clarification Questions |
| 1. 20/09/2022 | Deadline for submission of clarification questions (**“Clarifications Deadline”**) |
| 1. 27/09/2022 | 1. Response to Clarification Questions Issued |
| 1. **06/10/2022** | 1. Deadline for the submission of ITT Responses (**“ITT Deadline”**) **by 17:00** |
| 1. 20/10/2022 | 1. Completion of ITT Response evaluation process |
| 1. 27/10/2022 | 1. Moderation Meeting for shortlisting |
| 1. 03/11/2022 | 1. Interviews / Presentation |
| 04/11/2022 | 1. Issue of ITT results to bidders |
| 1. 08/11/2022 | 1. 10 days standstill period & Feedback to unsuccessful bidders |
| 1. **WC 21/11/2022** | 1. Contract Award Date |

# COMPLETION OF THE ITT RESPONSE

## You must submit your completed ITT Response to <https://health-family.force.com/s/Welcome> on or before the [ITT Deadline](#_procurement_timEtable).

## A completed ITT Response consists of a completed Questionnaire form completed by the Bidder as set out within table 3 in para 6.3 below. All these elements of the ITT Response must be completed.

## A Tender must remain valid and capable of acceptance by the Authority for a period of 120 days following the Tender Submission Deadline. A Tender with a shorter validity period may be rejected.

## You should note that the only permissible way to participate in this procurement is to submit an ITT response to the [https://health-family.force.com/s/Welcome](https://scanmail.trustwave.com/?c=8248&d=kqqs4E4CJf5cKG0sKgq2L4QQblJWHL0HuJlEGYhKzg&u=https%3a%2f%2fhealth-family%2eforce%2ecom%2fs%2fWelcome).

## ITT Responses submitted by any other means will not be accepted as part of this procurement.

## **Additional Documents and Attachments**

### No additional documentation should be submitted with a response except where such documentation is specifically required by this ITT.

### Any additional documents required by the ITT should be submitted as separate files via the eTendering portal. File formats will be specified in the relevant sections. Any documents uploaded that are not requested or in the correct file format will be rejected and not evaluated.

## **Data Entry**

### Only information entered into the appropriate answer boxes (which may be extended as necessary) will be taken into consideration for the purposes of evaluating a response, except where additional documentation is specifically requested in this ITT.

### You must not alter any questions set out in this ITT in your response. Amended questions will not be evaluated and a score of zero will be applied.

### All answers in your response should be inserted into the relevant answer box to the right of, or immediately below, the question box.

### Please answer all questions accurately and concisely.

### You should not cross reference your response to one question in your response to another, even where there is commonality.

### BEH will disregard any part of a response to a question provided in excess of a specified word limit (where stated).

### Where a YES or NO response is required, please clearly indicate your intended response.

## **Uploading Responses**

### Your ITT Response may be submitted at any time before the ITT Deadline.

### It is your responsibility to ensure that your ITT Response has been submitted in accordance with this ITT by the ITT Deadline.

### ITT Responses submitted after the ITT Deadline may not be considered by BEH. The decision on whether to accept and evaluate late ITT Responses is entirely at BEH’s discretion and is likely to be rejected unless you can provide irrefutable evidence that your ITT Response was capable of being received in full by the due date and time.

### It is your responsibility to ensure that the tender return documents (incorporating the ITT Response and any attachments) has been successfully submitted to the eTendering portal as mentioned above. It is your responsibility to ensure all documents have been uploaded correctly to the eTendering portal. BEH takes no responsibility for the workings of the system. Any concerns should be raised directly with the eTendering Portal supplier (contact details available on the portal).

## **Sub-Contracting Arrangements**

### If you propose a sub-contracting arrangement to deliver services under any ensuing contract following this procurement, all information provided in the ITT Response should be given in respect of the prime contractor.

### If sub-contractors will play a role in the delivery of the Services under any ensuing contract, relevant information should also be provided in relation to those sub-contractors in response to question [A3].

### BEH recognises that arrangements in relation to sub-contracting may be subject to future change. However, you should be aware that where the nominated sub-contractors play a significant role, any changes to the sub-contracting arrangements may constitute a material change to:

#### your Tender and may affect your ability to continue in the procurement process; or

#### the Contract awarded as a result of this procurement exercise (if the change occurs after the contract has been awarded).

## **Consortium Arrangements**

### If you are bidding as a consortium, you must provide all the information sought in this ITT in respect of each of the consortium's constituent members. All this information must be included as part of a single composite response. For the avoidance of doubt BEH does not regard a bidder who proposes to use a prime contractor / subcontractor arrangement as a consortium.

### If you are bidding as a consortium and you have formed (or intend to form) a corporate entity (e.g. a limited company, limited liability partnership), the consortium MUST provide details of the actual or proposed percentage shareholding of the constituent members within the consortium (as requested in question [A4] of this ITT).

### If a consortium is not proposing to form a corporate entity, full details of alternative proposed arrangements should be provided in question [A4]. However, please note that BEH reserves the right to require a successful consortium to form a single legal entity in accordance with regulation 28 of the Regulations.

# ITT EVALUATION PROCESS

* 1. Paragraphs 6.1 to 6.4 below set out the process used by BEH to assess bidders’ ITT Responses. Table 3 (Evaluation Model) at paragraph 6.5 summarises the evaluation process and sets out the scores, weightings, total marks and proportion of marks available for each Scored Question.

## **Section A – Information Only Questions**

1. The information you submit in response to the ITT is provided to BEH for information purposes, however completion of these questions is mandatory and some of the information provided will be used for an assessment of your economic and financial standing (see paragraph 6.3). If you fail to respond comprehensively and accurately to any of these mandatory questions such failure may render your ITT Response non-compliant. BEH reserves the right to exclude non-compliant ITT Responses from further evaluation which may prevent you from further participation in this procurement exercise.

## **Section B – Standing**

### In some circumstances BEH is required by law to exclude you from participating in this procurement. If you cannot answer ‘no’ to every statement in question [B1] (Grounds for mandatory rejection (ineligibility)) then you should contact BEH for advice before completing your ITT Response. If you cannot answer ‘no’ to every statement in question B1 it is very likely the ITT Response will be rejected and you will be excluded from participation this procurement.

### BEH is entitled (in its sole discretion) to exclude you from further participation in this procurement if any of the statements in question [B2] (discretionary grounds for rejection) apply. If you cannot answer ‘no’ to every question it is possible that your ITT Response will be rejected and you may be excluded from further participation from this procurement as a result. In the event that any of the discretionary grounds for rejection do apply, please set out (in a separate Appendix in Microsoft Word format) the full facts of the relevant incident and any remedial action taken subsequently. The information provided will be taken into account by BEH in considering whether or not you will be permitted to proceed any further in this procurement exercise.

### BEH requires reassurance that should you be successful in this procurement, that you will have or will obtain the minimum insurance values specified in question [B3] in the event of being successfully awarded the contract. Question [B3] requires a “yes” response. If you cannot answer ‘yes’ to this question your ITT Response will be rejected and you will be excluded from further participation in this procurement as a result.

### BEH require reassurance that should you be successful in this procurement, you will have a Quality Management System in place as specified in question [B4.1]. Question [B4.1] requires a “yes” response. If you cannot answer ‘yes’ to this question your ITT Response will be rejected and you will be excluded from further participation in this procurement as a result.

## **Economic and Financial Standing**

### The information you provide in response to the information only questions referred to in paragraph 6.1 above will be used for the purposes of carrying out an assessment of your economic and financial standing. If a guarantee or performance bond is required, BEH will perform an assessment of your guarantor’s economic and financial standing in accordance with paragraph 6.3.

### BEH uses a credit reference agency (currently Sid4Gov) as the first stage in determining financial risk. BEH will request a Sid4Gov financial risk score based on the information provided in your ITT Response. The report provided by Sid4Gov will be used to determine the level of financial risk that your organisation represents. If the score provided by Sid4Gov is 51 or more (where a standard UK score is available), or the risk level is ‘average’ or better (where a standard International score is available) then you will be allocated a ‘pass’ and your organisation will proceed to the next stage of evaluation.

### If any of the following circumstances arise:

#### the score provided by Sid4Gov (where a standard UK score is available) is less than 51; or

#### the risk level is above (i.e. worse than) average (where a standard International score is available); or

#### no standard Sid4Gov score is available for your organisation,

then BEH may ask you to provide one or more of the following in respect of your organisation or your guarantor (as the case may be):

#### a copy of its audited accounts for the most recent two years;

#### a statement of its turnover profit and loss account and cash flow for the most recent year of trading;

#### a statement of its cash flow forecast for the current year and a bank letter outlining the current cash and credit position; and/or

#### an alternative means of demonstrating financial status if trading for less than a year.

### BEH will use the information described in paragraphs 6.3.3.4 to 6.3.3.7, in addition to a detailed Sid4Gov report (where available) to assess whether the organisation’s financial risk is average or better. This will be performed using BEH’s financial assessment template covering a range of financial risk indicators, similar to those used by credit reference agencies.

### If BEH determines (in accordance with paragraph 6.3.4) that the financial risk is average or better, the bidder will be allocated a ‘pass’ and the bidder’s ITT response will proceed to the next stage of evaluation.

### If BEH determines (in accordance with paragraph 6.3.4) that the financial risk is above (i.e. worse than) average, then the bidder will be allocated a ‘fail’ and the bidder’s ITT Response will NOT proceed to the next stage of evaluation.

### If BEH carries out a financial risk assessment on your organisation and your financial risk is determined as being above (i.e. worse than) average and you did not indicate in response to the Preliminary Questionnaire that a guarantee or performance bond will be provided, BEH may (in its sole discretion) request that you nominate a guarantor. If you nominate a guarantor BEH will undertake a financial risk assessment in accordance with paragraphs 6.3.2 to 6.3.6 above in respect of the guarantor.

## **Sections C & D – Scored Questions**

### The ITT Response relating to the questions set out in [Sections C & D] of the Detailed Questionnaire will be evaluated for each section (“**Scored Questions**”).

### A marking scheme for each Scored Question is set out in the Detailed Questionnaire which describes the range of scores that can be achieved depending on the quality of your ITT Response (“**Marking Scheme**”).

### **A minimum pass mark applies to all questions, as explained in the guidance box following the question. If you score less than this minimum pass mark for those questions, your entire ITT response will be rejected and you will not be invited to participate further in this procurement**.

### ITT Responses will be evaluated and scored independently by three evaluators who will apply the Marking Scheme for each Scored Question. The evaluators used to assess the ITT Response for each Scored Question may differ. A moderator will review the scores allocated by each of the three independent evaluators. If in respect of a Scored Question:

#### the scores awarded by the evaluators are the same then you will be awarded that score for the question; or

#### any anomalies occur, then the moderator will facilitate discussion between each of the evaluators who will agree and award a consensus score in respect of your response for the question.

### Where the Questionnaire requires a 'Yes' or 'No' response to a Scored Question, the moderator alone will determine the score awarded without further discussion with the other evaluators.

### A score of 0, 1, 2 or 3 (as the case may be) for your response to a question will entitle you to receive a mark as a proportion of the ‘maximum marks available’ (as set out in Table 3 (Evaluation Model)) in the following proportions (**“Mark”**):

### **Table 2**

|  |  |
| --- | --- |
| **Score** | **Scoring Methodology** |
| 3 | Detailed response providing a comprehensive and complete description of the requirement, which is supported by evidence (where relevant) and which presents no or very minimal concerns in relation to deliverability and/or performance and/or transfer of risk to BEH. |
| 2 | Clear response providing visibility of compliance with the requirement, but there are minor deficiencies in the evidence provided (where relevant) and/or minor concerns in relation to deliverability and/or performance and/or transfer of risk to BEH. |
| 1 | Basic response with limited information about the requirement and/or there are major deficiencies in the evidence provided (where relevant) and major concerns in relation to deliverability and/or performance and/or transfer of risk to BEH. |
| 0 | Unanswered, or the response does not address the requirement. |

### 

### The Marks you achieve for each of the Scored Questions will be added together to derive your total mark (“**Final Mark**”).

## **Table 3 (Evaluation Model)**

|  |  |  |
| --- | --- | --- |
| **Evaluation Criteria for Selection of Provider** | | |
| **Criterion:** | | **Percentage Weighting:** |
| **Technical/Quality** | Experience  \* Management Structure  \* Skills and qualifications  \* Contract Examples (NHS desirable, not mandatory) | 30% |
|  | Quality  \* Service Delivery Method Statement  \* Implementation & Delivery Plan | 20% |
|  | Social Value | 10% |
|  | Interview / Presentation | 10% |
| **Commercial** | Commercial | 30% |
|  | **Total** | **100%** |

# invitation to tender STAGE and award numbers

## Following receipt and evaluation of tenders, a Contract will be awarded the bidder offering the Most Economically Advantageous Tender.

# CONDUCT

## You shall ensure that each and every sub-contractor, consortium member and adviser abides by the terms of this ITT.

## Your employees who are involved in this procurement process shall not make contact with any employee, agent or consultant of BEH or any relevant Other Contracting Authority that is in any way connected with this procurement exercise during the period of this procurement exercise except as set out in this ITT or as instructed otherwise by BEH.

## If you or any of your subcontractors, consortium members or advisors are currently providing services to BEH, we reserve the right to require you (including your subcontractors, consortium members or advisors) to establish and maintain an appropriate confidentiality arrangement which shall be approved by BEH (such approval not to be unreasonably withheld or delayed) between your personnel (including your subcontractors’, consortium members’ or advisors’ personnel) who are involved in the provision of services to BEH and the personnel who are involved with this procurement exercise.

## BEH reserves the right to require you to put in place any procedures or undertake any such action(s) that BEH at its sole discretion considers necessary to prevent any collusive behaviour between you and other bidders.

## If you participate in multiple bids - by (for example) submitting a ITT Response in your own name and featuring under another Response either as a sub-contractor or as a member of a consortium – then BEH retains the right to make further enquiries regarding each ITT Response in which you are participating to satisfy itself that the ITT Responses and/or any subsequent response to the ITT does not cause potential or actual conflicts of interest, supplier capacity problems, restrictions or distortions to competition between bidders under this procurement and/or among those successful bidders who may be awarded a Contract. BEH reserves the right to ask you to amend or withdraw all or part of the ITT Responses in which you are participating if in its reasonable opinion any of the above issues have or may arise.

# QUESTIONS AND CLARIFICATIONS

## BEH will not enter into exclusive and/or detailed discussions on the requirements of this procurement with you.

## Unless otherwise instructed by BEH, you may raise questions regarding the ITT at any time prior to the Clarifications Deadline (see Table 2 at paragraph 4). These questions should be submitted to <https://health-family.force.com/s/Welcome>

## To ensure that all bidders have equal access to information regarding this ITT, BEH will publish all its responses to questions raised by you and other bidders regarding the ITT.

## If you wish to ask a question without BEH revealing the question and its answer, then you should notify BEH and provide your justification for withholding the question and any response. If BEH does not consider that there is sufficient justification for withholding your question and the corresponding response, BEH will invite you to decide whether:

### the question and response should in fact be published; or

### you wish to withdraw the question.

## It is your responsibility to monitor the ‘Questions and Answers’ document in particular for any clarifications or other information issued by BEH.

# CONFIDENTIALITY

## Subject to the exceptions referred to in paragraph 10.2, the contents of this ITT are being made available by BEH on condition that:

### you shall at all times treat the contents of this ITT and any related documents (together called the **“Information”**) as confidential, save in so far as they are already in the public domain;

### except where, and to the extent that, the Information has been publicised in accordance with the Transparency provisions in paragraph 11, you will not disclose, copy, reproduce, distribute or pass any of the Information to any other person at any time or allow any of these things to happen;

### you will not use any of the Information for any purpose other than for the purposes of responding (or deciding whether to respond) to the ITT; and

### during the procurement process, you shall not undertake any publicity activity related to this procurement within any section of the media.

## You may disclose, distribute or pass any of the Information to your advisers, sub-contractors, consortium members or to another person provided that:

### this is done for the sole purpose of enabling you to submit a ITT Response and the person receiving the Information undertakes in writing to keep the Information confidential on the same terms as if that person were you; or

### you obtain BEH’s prior written consent in relation to such disclosure, distribution or passing of Information; or

### the disclosure is made for the sole purpose of obtaining legal advice from external lawyers in relation to the procurement; or

### you are legally required to make such a disclosure; or

### the Information has been published or disclosed in accordance with paragraph 11 (Transparency and Freedom of Information).

## In paragraphs 10.1 and 10.2 above the definition of 'person' includes but is not limited to any person, firm, body or association, corporate or incorporate.

## BEH may disclose information received from you in relation to this ITT to its officers, employees, agents or advisers.

# TRANSPARENCY AND FREEDOM OF INFORMATION

## In accordance with the obligations and duties placed upon public authorities by the Freedom of Information Act 2000 (the 'FoIA'), BEH may, acting in accordance with the Secretary of State's Code of Practice on the Discharge of the Functions of Public Authorities under Part 1 of the said Act, or Environmental Information Regulations 2004 (the “EIR”) be required to disclose information you submit to BEH. This may include, but is not limited to, the disclosure of:

### a ITT Response (including any attachments);

### any score(s) awarded to a ITT Response;

### any evaluator comments relating to a ITT Response;

### the ranking of a ITT against the other ITT Responses; and/or

### the success (or otherwise) of a ITT Response.

## In respect of any part of the ITT Response you submit that you consider commercially sensitive you should, in a separate Appendix in Microsoft Word format:

### clearly identify such information as commercially sensitive;

### explain the potential implications of disclosure of such information; and

### provide an estimate of the period of time during which you believe that such information will remain commercially sensitive.

## Where you identify that parts of your ITT Response are commercially sensitive, BEH will endeavour to maintain its confidentiality. You should note, however, that, even where information is identified as commercially sensitive, BEH may be required to disclose such information in accordance with the FoIA or the EIR. In particular, BEH is required to form an independent judgement concerning whether the information is exempt from disclosure under the FoIA or the EIR and whether the public interest favours disclosure or not. Accordingly, BEH cannot guarantee that any information marked “confidential” or “commercially sensitive” will not be disclosed.

## If you receive a request for information under the FoIA or the EIR during the procurement process, this should be immediately passed on to BEH and you should not attempt to answer the request without first consulting with BEH.

## In accordance with the UK Government's policies on transparency, BEH reserves the right to make all or part of the Information (referred to in paragraph 10.1 above) publicly available (subject to any redactions made at the discretion of BEH).

## For the avoidance of doubt, your ITT Response shall not be made publicly available unless such disclosure is required in accordance with paragraph 11.1 or 11.7.

## You should note that the terms of the proposed Contract will permit:

### BEH to publish the text of such Contract, subject to possible redactions at BEH’ discretion.

## In submitting your ITT Response, you acknowledge that information contained within your ITT Response may be incorporated into any Contract awarded to you and as such it may be subject to disclosure in accordance with this paragraph 11.

# GENERAL PROVISIONS aND DISCLAIMERS

## All material issued in connection with this ITT shall remain the property of BEH and shall be used only for the purpose of this procurement exercise.

## BEH shall not be committed to any course of action as a result of:

### issuing this ITT or any invitation to Tender in this procurement exercise;

### communicating with you or your representatives, agents or advisers in respect of this procurement exercise; or

### any other communication between BEH and/or any relevant Other Contracting Authority (whether directly or by its agents or representatives) and any other party in respect of this procurement exercise.

## You shall accept and acknowledge that by issuing this ITT, BEH shall (in accordance with the Regulations) not be bound to accept any ITT Response.

## BEH reserves the right to amend, add to or withdraw all, or any part of this ITT at any time during the procurement exercise.

## No information contained in this ITT or in any communication made between BEH and you in connection with this ITT shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this ITT or at all. BEH reserves the right, subject to the rules set out in the Regulations, to change without notice the basis of, or the procedures for, the competitive tendering process or to terminate the process at any time. Under no circumstances shall BEH incur any liability in respect of this ITT or any supporting documentation.

## This ITT and any attachments or references have been prepared in good faith but do not purport to be a comprehensive statement of all matters relevant to this procurement exercise. Neither BEH nor its advisers accept any liability or responsibility for its adequacy, accuracy or completeness, nor do they make any representation or warranty, express or implied, with respect to the information it contains. You should form your own conclusions about the methods and resources needed to meet BEH’ requirements. BEH and its advisers do not accept responsibility for your assessment of these requirements. You are responsible for obtaining all information required to prepare your responses. This exclusion does not apply to the extent of any deceit or fraudulent misrepresentation made by or on behalf of BEH.

## Direct or indirect canvassing of BEH or its advisers (other than in accordance with the terms of this ITT), NHS employee or agent by you or any agent or person acting on your behalf concerning this procurement, or any attempt to procure information from any NHS employee or agent concerning this ITT may result in your disqualification under this procurement exercise.

## BEH shall not be responsible for you or your subcontractors, consortium members or advisors costs or expenses incurred in connection with the preparation or submission of your ITT Response; including, for the avoidance of doubt, in circumstances where this procurement is cancelled.

## This ITT shall be governed by the laws of England and Wales.

## Should you be successful, the contents of this document and the NHS Standard Services Terms and Conditions with additional schedules derived from your response to the ITT, will be subject to the constitution of the contract. This will be finally determined by BEH.

# glossary

* 1. Unless the context otherwise requires, the following words and expressions used within this Pre-Qualification Questionnaire shall have the following meanings:

**“BEH”** means Barnet, Enfield, and Haringey NHS Foundation Trust (Head Office located at: Trust HQ, PEAR BLOCK, St Ann’s Hospital, St Ann’s Road, London, N15 3TH.

* 1. **“Contracting Authority”** means BEH and any other contracting authorities described in the Notice;
  2. "**Detailed Questionnaire**" means the detailed questionnaire set out in Schedule 1 of this ITT;
  3. **“EIR”** mean the Environmental Information Regulations 2004 together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such regulations;
  4. **“Final Mark”** shall have the meaning given in paragraph 6.4.8;
  5. **“FoIA”** means the Freedom of Information Act 2000 and any subordinate legislation made under such Act from time to time together with any guidance and/or codes of practice issued by the Information Commissioner or relevant Government department in relation to such legislation;
  6. **“Invitation to Tender” or “ITT”** meansthe invitation to tender documentation and all related documents published by BEH in relation to this procurement;
  7. **“Mark”** shall have the meaning in paragraph 6.4.7;
  8. **“Marking Scheme”** shall have the meaning in paragraph 6.4.2;
  9. **“Finder A Tender”** means the advertisement for this procurement published in the Find A Tender Service;
  10. **“Other Contracting Authority”** means all Contracting Authorities except BEH;
  11. **“ITT Deadline”** means the time and date set out in Table 2 at paragraph 4 (Procurement Timetable);
  12. **“ITT Response”** means your response submitted in accordance with the terms of this ITT indicating your interest in participating in the ITT;
  13. **“Regulations”** means the Public Contracts Regulations 2015 (as amended) and the Public Contracts (Scotland) Regulations 2006 (as amended);
  14. **“Scored Questions”** means those questions referenced in paragraph 6.4.1 above;

# Part 2 Specification

# Specification

1. **Introduction and Overview**

Service provision of Organisational, Senior Leaders, Team Leaders and Team OD interventions for BEH Trust*.* The supplier is to provide a range of OD interventions to support the culture change required as part of the Transformation OD Plan supporting the Adult Community Mental Health Transformation teams.

1. **Background, Policy Context and Evidence Base**

Community Mental Health Framework (Community Transformation - CT), part of the NHS Long-term plan, provides guidance to mental health Trusts, specifically community teams and outpatient services, about how to meet the needs of people with severe and enduring mental health issues in the next 5-10 years.  The key aims outlined in The Community Mental Health Framework for Adults and Older Adults are provided below:

**Figure 1: Aims taken from the Community Mental health Framework**

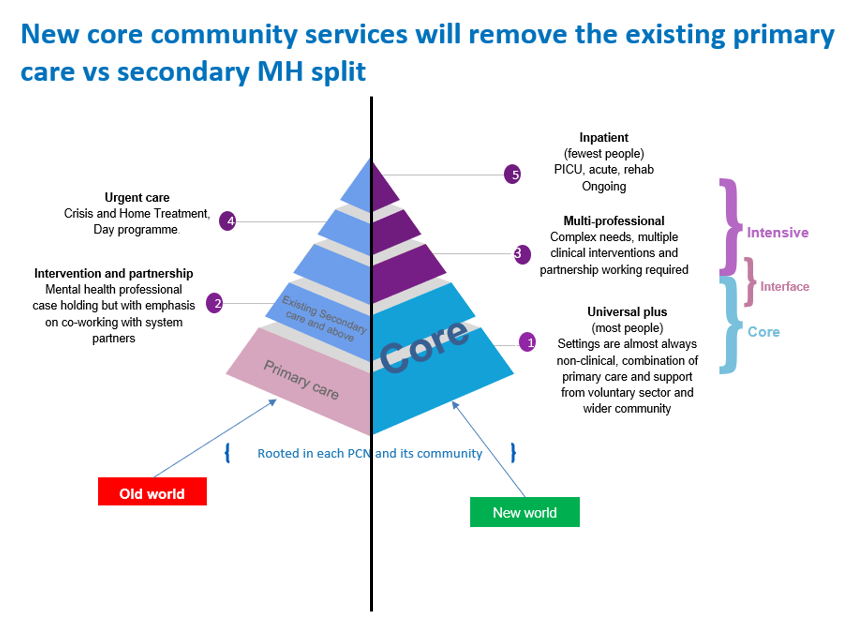
Graphical user interface, text, application

Description automatically generated

To achieve these aims, there has been a re-alignment of community teams, and the transformation work involves re-drawing the relationships between those core teams (community teams that act as a front-door) and primary care providers and intensive (more specialist provision) community mental health teams internally. The implications for services include:

1. Shift from referral --> assess --> treat --> retain, to blended model that looks to support people with community service
2. Focus on Health Inequalities
3. Model existing and new staff across core services
4. Identify existing cases, and work towards supporting cases that can be covered by the PCN-focused core services in the future
5. Identify ‘not known’ cases already known to PCN providers

**Figure 2: Describing the difference between the ‘old’ and ‘new service configuration**



**Core, Intensive & VCS Services will be embedded in teams wrapped around the PCN**

**Core services will:**

**Community Transformation KPIs**

All community teams, but especially core services, are expected to:

1. see more people ***(increase in numbers seen)***
2. get people into therapeutic treatment earlier ***(4-week standard for treatment)***
3. provide psycho-social support ***(use DIALOG+ care planning)***
4. Stronger community support for people ***(numbers out of secondary care services, with VCS support).***

* Provide support to the front door, triaging, assessing and consulting with system partners ​
* Provide access to treatment appointments and deliver interventions directly ​
* Have a good working knowledge and broad experience of clinical presentations, treatment approaches, and ideally have experience across different settings for example, inpatient, urgent care, community mental health, therapies, local authority, primary care, VCS, housing​

**Intensive services will:**​

* Have a highly specialist level of knowledge, attitudes and skills for specific clinical presentations Generally work with more complex service users ​
* Will spend most of their week in an Intensive only team​
* Spend a proportion of their time supporting core services for example, providing specialist advice.​

**Voluntary & Community Sector:**​

* Acting as a bridge between statutory and non-statutory spaces, including help the Core Community Team to asset map and know their local area​
* Coordination of provision within wider voluntary sector to maximise resources and simplify pathways​
* Co-producing solutions with, and addressing inequalities alongside, local communities

To do this, teams are required to respond to local needs (address inequalities/prevention work) and work more extensively with voluntary and community partners, primary care providers, and support transitions between services. This is a move away from how services are currently conceptualised: medical model provision, with high thresholds of service, providing intensive support for a small number of people for extended periods of time, with limited community engagement.

To enhance local relationships, there has been:

* Realignment of how local teams relate to local primary care networks. This has resulted in two Divisions merging four teams into three new teams, creating six new teams in total and one Division with two teams that have expanded to encompass a bigger geographical area. Medical and clinical staff have needed to move to facilitate this.  These moves have also had an impact on clients and service users.
* A new service relationship with the voluntary sector, so that teams have expanded in size with non-registered (non-clinical) staff.

Additionally, like all NHS services, and especially those in London, it is critical that we retain staff. Asking for a significant change, in the post-pandemic context, is creating stressors for teams and individuals, and therefore building resilience in teams is as important as the delivery of the programme objectives.

1. **Aims and Objectives of Contract**

The aims of the contract are to facilitate staff and team to deliver the Key Performance Indicators (outlined above), while retaining and developing staff. The OD interventions should develop our teams so that they are:

* Empowered, responsible teams implementing new ways of working
* Given space to understand key challenges
* Feel enabled to engage with new challenges
* Skilled and developed staff able to meet new challenges
* Teams feel responsible for their well-being, and have resilience strategies to support this

1. **Service Description and Service Delivery**

Specifically, we want to develop the leadership capabilities within the core community services, and how the senior strategic teams enable leadership at this managerial level. We are looking to commission three types of OD intervention, which will need to be practical, evidence-based, and use diagnostic and development tools that support leaders with understanding their key challenges and deliver against the key programme aims and those of the NHS people plan.

**Intervention to Support Team Leaders**

Core services (Front-door) are the engine of CT, changing who they work with, how and for how long is a key challenge. In the context of this significant change, we are interested to commission an intervention to support key service-level managers in their leadership development that supports them to enhance effective team-based working and develop each teams’ capacity to create positive team based working cultures, to enable people to flourish.

Therefore, we want the provider to provide a minimum of two cohorts of up to 12 Team Leaders per cohort. Team leaders should be provided with the knowledge and skills to work directly with their team through a journey to high performance, supported by diagnostic and development tools. This should also provide opportunities for peer working, and 121 coaching for team leaders.

Team Leaders to be supported to learn how to:

* Establish a shared language/understanding around CT, use principles around team-based working, and re-enforce the Trust’s vision and values
* Understand the benefits of team-based working for their own service area
* Develop team working skills and practices
* Define a clear team identity and objectives
* Bring about role clarity and best use of skills and knowledge
* Increase decision making in the team
* Enhance the process of communication
* Enable teams to have constructive debate
* Improve inter-team working
* Monitor and assess team working effectiveness

As part of additional support, separate from this contract, teams involved in CT will have a series of away days over the next nine months to support team alignment behind the KPI activity. The expectation is that the team leaders, through the support of the team leader's intervention, understand the purpose of aways days in regards of building high-performing teams, and will drive content appropriate for their team.

The key deliverables from the team leader intervention are:

* Baseline measures, and progress against those measures
* Small group work of team leaders
* Meeting over a six months programme
* Planning for Team Away days
* Feedback of each session
* Knowledge transfer for team leaders to be able to use the theoretical framework

**Intervention to Support Teams**

In addition to the above we recognise that there are certain teams that have additional challenges on top of the CT, and therefore may not be as well placed as other teams to deliver the new KPIs. We are keen to support specific teams to work better together, to understand the challenges of today and to deliver a quality service that supports the needs of our services users and communities.

Therefore, we want the provider to support two teams (two cohorts) with staff numbers between 20-30 staff per cohort.

Whole teams to be supported and provided with:

* A team diagnostic tool to gain an understanding of the team dynamics
* A platform to develop psychological safety
* An understanding of effective team development
* A series of intensive coaching sessions that includes:
  + Identifying short- and long-term team objectives
  + Improving the team climate for collaboration and innovation
  + Developing clarity about own and other’s roles within the team
  + Clarify and enhance team inter-dependency
* Establish a shared language/understanding around CT, use principles around team-based working, and re-enforce the Trust’s vision and values.
* Understand the benefits of team-based working for their own service area
* Develop team working skills and practices
* Define a clear team identity and objectives
* Bring about role clarity and best use of skills and knowledge
* Increase decision making in the team
* Enhance the process of communication
* Enable teams to have constructive debate
* Improve inter-team working
* Monitor and assess team working effectiveness

The key deliverables from the intensive team are:

* Diagnostic work with team members, that includes a team diagnostic tool to gain an understanding of the team dynamics
* Baseline measures, and progress against those measures
* Series of meeting/coaching over a six month programme
* Coaching for the team leadership team
* Engagement with Team Away days
* Feedback of each session
* Knowledge transfer for team leaders to be able to use the theoretical framework

**Intervention to Support Strategic Operational Leaders**

The NHS leadership challenges for the next decade includes moving away from a Command-and-Control structure to a more participatory style of leadership. The way in which transformation programmes are often rolled out involves matrix governance arrangements, across senior levels in an organisation to be able to satisfy assurance requirements. This by design, is exclusive to a very senior level. One of the challenges has been a perception by team leaders that they are not involved in key decision-making, and strategic leaders often make decisions and then inform team managers. Additionally, research into compassion at work is attracting increasing interest in the NHS People Plan. The evidence suggests that compassion makes a profound difference to outcomes for those accessing care and support and protects the well-being of those providing it.

Therefore, this intervention is to support strategic leadership reflect on leadership style and embrace more collaborative decision-making. Therefore, we want the provider to support to one cohort of up to 15 senior leaders to attend a Leadership programme that supports:

* An experiential learning opportunity to demonstrate the value and impact of compassionate leadership.
* Ways to empower and trust operational leaders in decision making.

The key deliverables from the Senior Teams leaders are:

* A series of events/workshop/learning that build on insights and actions
* Feedback of each session.

**Methodologies to Support the Programmed Activity**

It is expected that the organisation interested to deliver this will have a theoretical framework that informs the interventions they develop.

To demonstrate the impact of delivery and to track the intervention effectiveness the following is required:

* A benchmark measure of team performance at the beginning of the development journey and again at the end. This should enable:
  + The prediction of sustainable team performance over time
  + Allow for comparison of individual team scores with those of other relevant teams
  + Measure potential to deliver effective performance.
  + Provides an evidence-based report that gives a clear indication on the key areas for development.

A proposal from the tenderer on an alternative model or methodology for measuring success and impact of delivery is also welcome.

1. **Outcomes**

The essential outcomes of the facilitated staff and team development programmes are for our people to have:

* A better understanding of CT programme
* A more informed workforce
* Increased integration of new roles
* More effective use of resources
* Increased activity & pace of change
* An understanding of blockages
* More effective solutions
* Agreed actions, with clear senior buy-in
* More accountability for actions
* Increased commitment
* Increased activity & pace of change
* An understanding of blockages
* More effective solutions
* Agreed actions, with clear senior buy-in
* More engaged staff
* More accountability for actions
* A feeling of being valued
* Increased retention and ability to recruit
* Reduced vacancy rates
* Less resistance to and anxiety about change
* Learning across teams
* More effective leadership
* Better engagement with key partners

**Methodologies to Support the Programmed Activity**

To demonstrate the impact of delivery and to track the intervention effectiveness the following is required:

* A benchmark measure of team performance at the beginning of the development journey and again at the end. This should enable:
  + The prediction of sustainable team performance over time
  + Allow for comparison of individual team scores with those of other relevant teams
  + Measure potential to deliver effective performance.
  + Provides an evidence-based report that gives a clear indication on the key areas for development.

A proposal from the tenderer on an alternative model or methodology for measuring success and impact of delivery is also welcome.

1. **Performance Measures**

The key performance (Outcome) measures for the programme will be judged by the teams receiving support who can show progress towards:

1. CT KPIs, (outlined above)
2. Staff outcomes improvement measures:

* Improvement in key HR measures at a community level (vacancy, turnover rates)
* Staff Experience: increase in local survey, reduction in short term sickness absence rates.

1. Performance (Process) measures of the interventions are:

* The progress against benchmarked data set, outlined in the methodology section for people included in each intervention.
* Attendance by key leaders on the development opportunities, including opportunities outside of this work, and 121 opportunities within this work
* Number of coaching opportunities taken up

1. Qualitative information post session - themes and issues

* Work with BEH to submit a case study on the work, leadership development and impact that this initiative, (group, individual or illustrate good practice/innovative work) alongside other OD work, for example 360 appraisals for leaders and Team Away days, has on delivering the benefits of CT.

The CT team are currently developing a method of simplistic staff engagement measure, based on the staff survey engagement questions. We are looking for board approval, and if adopted, will also be used to reflected on the effectiveness of the programme.

1. **Contract Period**

**Length of Contract**

The contract will be for a period of delivering three interventions (team leaders with two cohorts; two teams in crisis; one team of senior leaders) as described above between December 2022 and September 2023

Contract price – up to £80K excluding VAT

Supplier to provide a project plan and timetable.

Should there be a need for additional activity or day(s) work, provider to provide pricing schedule for this.

1. **Contract Monitoring**

**Formal monitoring**

Initial mobilisation sessions, to develop project plan.

Quarterly meetings with contract representative in April 2023, July 2023, October 2023. Reports on progress toward outcomes and monitoring data submitted one week in advance of scheduled meeting.

* Numbers attending
* Success measures against KPIs
* Staff progress against initial measure
* Themes and issues

Progress on work to narrate the impact of the programme.

End of programme report and lessons learned to be submitted in October 2023.

**Informal Monitoring and Engagement with the CT Team**

Monthly operational review and update reports post session to cover activity, attendance, and progress by team leaders, teams and senior leaders.

Collaboration with the CT OD lead around delivery of the interventions.

1. **Key Risks**

The CT programme has already had funding for 18 months. Many activities in the early period focused on governance and project planning. This reinforced a top-down approach, and fewer opportunities to involve front-line staff. As a result, we are at risk of staff fatigue with change, and disengagement.

The Trust has three divisions involved in CT (which maps to our geographical boroughs) and uses ‘freedom within a framework’ as a way of capturing the different processes and stages that each division is in. Additionally, some divisions have invested in local OD resources, and others have not, creating tension. The governance and oversight of the OD and Workforce plan is still evolving, so the central drive does not fully exist to counterbalance the ‘exceptionalism’ that exists in divisional structures.

The re-emergence of the pandemic, or impact therein of staff sickness/availability could undermine the impact of work, if team leaders are not able to attend, or report that their teams have no ability/capacity to engage with progress.

1. **Sustainability**

Provide support for internal resources, and key opinion leaders to take the ethos of what is learned and delivered for example, participatory leadership, building and developing leadership programmes into the Trust way of working. Team leaders should be able to use the framework and knowledge as a resource within the Trust.

1. **End of Contract**

The contract will automatically terminate unless the authority decides to extend the contract. There will be a clause to extend the contract for a further possible 2 x 12 months.

# Part 3 Questions

# (Standard questions, quality and commercial)

# Marking Scheme and ITT Technical Questions

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| **SECTION A - INFORMATION ONLY QUESTIONS** |

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| **A1** | **Please state whether your organisation is the ultimate parent company within its group or whether it is a subsidiary or is otherwise controlled by another entity. If your organisation is a subsidiary or is controlled by another entity, what is its relationship with its ultimate parent company (and any holding companies) or the controlling body (i.e. in terms of ownership, directorship, authority and control)?** |
| **Bidder Response:** |  |

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| **A2** | **Please provide a one-page chart illustrating your organisation's ownership structure including its relationship to any parent or other group or holding companies.** |
|  | Submit as a separate attachment, as diagrams will not be visible in web page filtered format. |

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| **A3** | **Consortia and Sub-Contracting** | |
|  | **Please indicate by stating Yes or No in the blue boxes, whether:** | **Yes / No** |
| **Bidder Response:** | **(a) Your organisation is bidding to provide all the services required itself, without the use of any sub-contractors or consortium members** |  |
| **(b) Your organisation is bidding in the role of prime contractor and intends to use third parties to provide some services** |  |
| **(c) You are bidding as part of a consortium** |  |
| **If your answer is “Yes” in (b) or (c) please provide a separate Appendix showing the composition of the supply chain, listing the following:**   * **company/organisation name(s);** * **indication of which member of the supply chain (which may include the bidder solely or together with other providers) will be responsible for which elements of the requirement;** * **Confirmation of their commitment to provide the relevant services.** | |

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| **A4** | **If you have stated in question A3 that you are bidding as a consortium, e.g. as a corporate or a contractual joint venture please provide details of the structure of the consortium and the percentage shareholdings of each member or (in the case of contractual joint ventures) the contribution of each member to the consortium.** | |
| **Bidder Response:** | **Details of the proposed structure (e.g. corporate joint venture – new limited liability company established by the consortium, with x and y as guarantors).** |  |
| **Consortium Members** | **Percentage Shareholding / Contribution** |
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| **A5** | **If you have stated in question A3 that you are bidding as a consortium, please provide the names of any members of the consortium who are also submitting a separate ITT Response (either in their own name or as part of another consortium or subcontractor to another party) as part of this procurement exercise. Please state N/A if this question does not apply.** |
| **Bidder Response:** |  |

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| **A6** | **How many staff does your organisation (including consortia members or named sub-contractors where appropriate) employ relevant to the carrying out of services similar to those required under this contract?** |
| **Bidder Response:** |  |

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| **SECTION B – GROUNDS FOR REJECTION** | | |
| **[B1]** | **Grounds for mandatory rejection (ineligibility)** | |
| **Bidder Response:** | **Has your organisation or any directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences?** | **Yes/No** |
| 1. conspiracy within the meaning of section 1 of the Criminal Law Act 1977 where that conspiracy relates to participation in a criminal organisation as defined in Article 2(1) of Council Joint Action 98/733/JHA (as amended); |  |
| 1. corruption within the meaning of section 1 of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906 (as amended); |  |
| 1. the offence of bribery; |  |
| (ca) bribery within the meaning of section 1 or 6 of the Bribery Act 2010; |  |
| 1. fraud, where the offence relates to fraud affecting the financial interests of the European Communities as defined by Article 1 of the Convention relating to the protection of the financial interests of the European Union, within the meaning of: | |
| * 1. the offence of cheating the Revenue; |  |
| * 1. the offence of conspiracy to defraud; |  |
| * 1. fraud or theft within the meaning of the Theft Act 1968 and the Theft Act 1978; |  |
| * 1. fraudulent trading within the meaning of section 458 of the Companies Act 1985 or section 993 of the Companies Act 2006; |  |
| * 1. defrauding the Customs within the meaning of the Customs and Excise Management Act 1979 and the Value Added Tax Act 1994; |  |
| * 1. an offence in connection with taxation in the European Community within the meaning of section 71 of the Criminal Justice Act 1993; or |  |
| * 1. destroying, defacing or concealing of documents or procuring the extension of a valuable security within the meaning of section 20 of the Theft Act 1968; |  |
| 1. money laundering within the meaning of the Money Laundering Regulations 2003 or Money Laundering Regulations 2007; or |  |
| 1. any other offence within the meaning of Article 45(1) of Directive 2004/18/EC as defined by the national law of any relevant State. |  |

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| **[B2]** | **Discretionary grounds for rejection** | |
| **Bidder Response:** | **Is any of the following true of your organisation?**  **If you answer ‘yes’ to** any of these questions please set out (in a separate Appendix in Microsoft Word format) the full facts of the relevant incident and any remedial action taken subsequently. | **Yes/No** |
| (a) being an individual, is bankrupt or has had a receiving order or administration order or bankruptcy restrictions order made against him or has made any composition or arrangement with or for the benefit of his creditors or has made any conveyance or assignment for the benefit of his creditors or appears unable to pay or to have no reasonable prospect of being able to pay, a debt within the meaning of section 268 of the Insolvency Act 1986, or article 242 of the Insolvency (Northern Ireland) Order 1989, or in Scotland has granted a trust deed for creditors or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of his estate, or is the subject of any similar procedure under the law of any other state; |  |
| (b) being a partnership constituted under Scots law, has granted a trust deed or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of its estate; or |  |
| (c) being a company or any other entity within the meaning of section 255 of the Enterprise Act 2002 has passed a resolution or is the subject of an order by the court for the company’s winding up otherwise than for the purpose of bona fide reconstruction or amalgamation, or has had a receiver, manager or administrator on behalf of a creditor appointed in respect of the company’s business or any part thereof or is the subject of similar procedures under the law of any other state? |  |
| **Has your organisation:** | |
| (a) been convicted of a criminal offence relating to the conduct of your business or profession; |  |
| (b) committed an act of grave misconduct in the course of your business or profession; |  |
| (c) failed to fulfil obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or of the relevant State in which you are established; |  |
| (d) failed to fulfil obligations relating to the payment of taxes under the law of any part of the United Kingdom or of the relevant State in which you are established; or |  |
| e) been guilty of serious misrepresentation in providing any information required of you under Regulation 23 of the Public Contracts Regulations 2006? |  |

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| **[B3]** | **INSURANCE** | |
|  | **Insurance – A 'Yes' Response to this question is mandatory.** | |
| **Bidder Response:** | **Please confirm that you have, or will obtain in the event of being successfully appointed to the Contract, the following minimum levels of insurance.** | **Yes / No** |
|  |
| Employers liability | £5 million |
| Public Liability | £1 million |
| Professional Indemnity | £1 million |
| Product Liability | £1 million |

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| **[B4]** | **QUALITY ASSURANCE AND CERTIFICATION** | |
|  |  | **Yes / No** |
| [B4.1] | Does your organisation have a Quality Management System (QMS) based on the principles of ISO 9001 or the European Foundation for Quality Management (EFQM) Excellence Model or equivalent? |  |
| [B4.2] | Does your organisation have a valid and in-date Quality Assurance Certification or Report in the form of:  an ISO 9001 Quality Assurance Certificate - registered by a UKAS accredited organisation (see <http://www.ukas.com/about-accreditation/accredited-bodies/certification-body-schedules-QMS.asp>) or a UKAS equivalent national body for non-UK bidders; or  a current EFQM ‘Committed to Excellence’ Assessor’s Report;  or equivalent?  The Certificate/Report must be relevant to the Services required and cover the location which will supply the Services. |  |
| If “Yes”, please provide copies of any relevant Certificates/Reports as separate attachments. | |
| [B4.3] | If you have answered “Yes” to question B4.1 but “No” to question B4.2 please provide brief details of the QMS used and include copies of your ISO 9001 compliant Quality Policy, Quality Manual Index and ISO 9001 Compulsory Documents (listed beneath the Marking Scheme); or your EFQM ‘Committed to Excellence’ Self Assessment Questionnaire (or equivalent). If your answer to B4.1 or B4.2 (or both) is “Yes” in respect of an equivalent, please state the equivalent(s) below, with a brief explanation of its/their relevance. | |
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| **C** | **SPECIFIC TECHNICAL & SERVICE REQUIREMENTS - DETAILED QUESTIONNAIRE**  ITT Response Questions (Technical/Quality) **– 50% WEIGHTING** |
| **[C1]** | **QUESTION 1** |
| **10%** | Please provide a summary of your experience (last 3 years) supporting NHS organisations develop staff-lead change, a description of the services and why you believe you are best placed to deliver the Trust’s requirements.  In your examples, please provide • Description of service • Describe impact/evidence of improved performance. • Contract values • Customer contact details, including up to date |
|  | **Minimum pass mark: 2** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 750) |

|  |  |
| --- | --- |
| **[C2]** | **QUESTION 2** |
| **10%** | Detail the management structure in place to support the successful performance of this contract. For similar projects, explain how you have communicated progress, problem-solving and engagement with the lead officer |
|  | **Minimum pass mark: 1** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 500) |

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| **[C3]** | **QUESTION 3** |
| **5%** | Please provide details of the team who will carry out the work, clearly setting out roles and responsibilities of each team member and their relevant experience. The proposal should make clear the team member(s) who will be carrying out the majority of the day-to-day work, including the facilitation of the Board Workshops, and their experience of similar assignments.  Please include short biographies, with only relevant experience, of the project team who will be supporting this piece of work, in the body of the supplier response section below, please include only relevant work experience for each team member.  Please attach CV of the team in supplemental documents |
|  | **Minimum pass mark: 2** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 2000) |

|  |  |
| --- | --- |
| **[C4]** | **QUESTION 4** |
| **15%** | Provide a delivery timeline (in line with the specific service requirements) of how you will deliver the contract.  Please including a high-level project plan and resources in the supplemental document |
|  | **Minimum pass mark: 2** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 750) |

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| **[C5]** | **QUESTION 5** |
| **10%** | Explain the theory's and/or methodologies your approach is based on, and how they are embedded in the proposed activity |
|  | **Minimum pass mark: 1** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 500) |

**Social Value – 10%**

|  |  |
| --- | --- |
| **[S1]** | Please describe your approach to social value. The response should include what your organisation does in our NHS community to:   * promote skills and knowledge development of our workforce * protect and improve our environment * create a healthier, safer and more resilient community |
|  | WEIGHTING = 5% |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 750): |

|  |  |
| --- | --- |
| **[S2]** | BEH is committed to work toward preventing and eliminating discrimination between people on the grounds of age, disability, gender reassignment, Marriage and civil partnership, Pregnancy and maternity, race, religion or belief, sex and sexual orientation by making sure that we build equality and diversity into all our working practices and those with our suppliers.  EDI is a significant driver in our workforce plan, to improve recruitment, retention, and developing staff teams that embrace and harness diversity. The proposed intervention would be an important mechanism for the core community teams  Please describe in your response:   * How you will embed equality and diversity in your approach/interventions * How you will ensure equality and diversity values are reflected in the final Organisational Development Plan * Support team leaders with the task of supporting and all team members |
|  | WEIGHTING = 5% |
|  | **SUPPLIER RESPONSE** (MAX WORD COUNT 750): |

|  |  |
| --- | --- |
| **MARKING SCHEME** 0-3 marks will be awarded as follows: | |
| 0 | **Fail:** the response completely fails to meet required standard or does not provide a proposal. |
| **1** | **Poor**: (meets some of the requirement) The response meets elements of the requirement but gives concern in a number of significant areas. There are reservations because of one or all of the following:   * There is at least one significant issue meeting considerable attention. * Proposals do not demonstrate competence or understanding. * The response is light and unconvincing. * The response makes no reference to the health or academic sectors applying for but shows some general market experience. |
| **2** | **Mostly Satisfactory:** (meets most of the requirement) The response meets most of the requirement but there is at least one significant issue of concern, or several smaller issues. These would require of some further clarification or attention later in the procurement process and may arise through lack of demonstrated capability and/or appropriate evidence. The response therefore shows:   * Basic understanding of the requirements * Sufficient competence demonstrated through relevant evidence * Some areas of concern or inconsistency that require attention. * The response addresses some of the health or academic sectors applying for. |
| **3** | **Very good:** (exceeds some of the major requirements) The response meets the required standard in all material respects. There are no significant areas of concern, although there may be limited minor issues that need further exploration or attention later in the procurement process. The response therefore shows:   * Good understanding of the requirements * Sufficient competence demonstrated through relevant evidence * Some insight demonstrated into the relevant issues. * The response addresses all of the health or academic sectors applying for and also shows good market experience. |

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| SECTION D - COMMERCIAL REQUIREMENTS **Evaluation of Pricing** |
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| The price (entered by Bidders in a separate proposal or own matrix) shall be calculated by taking the total of the solution price for the contract. |
| The Price per Bidder shall be compared across all Bidders and percentage scores shall be determined for each Bidder. |
| The Bidder with the best Price shall be awarded 30%, with remaining Bidders being awarded a percentage equal to their Price, relative to the best Price received by NELFT. |
| The calculation is as follows: |
|  |
| *Best Price divided by other Bidder’s Price multiplied by 30% = relative score achieved for other Bidder’s Price.* |

# APPENDICES

## **Appendix 1** – Please confirm you have submitted by placing a tick in the box.

|  |  |
| --- | --- |
| Information Only Questions – Within Part 3 of ITT |  |
| Mandatory grounds for rejection – Within Part 3 of ITT |  |
| Service and Quality Questions – Within ITT Within Part 3 of ITT |  |
| Social Value - Within Part 3 of ITT |  |
| Commercials\* - Bidder to provide proposal / pricing matrix |  |
| Declaration of interest |  |

## **Appendix 2 – Terms and Conditions – Standard NHS T&C’s**

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