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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

Management Information System (MIS) - ILR Management for NHSE, Choices College

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

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**Document History**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date | Status | Key Change Made | Author/s |
| 1.0 | 01/11/18 | Final Version |  | Charlie Stephens/Andrew Campan/Shared Business Services  |
| 2.0 | 15/07/19 | Final Version | Additional details relating to the Hive and where further information and guidance is available | Polly Feeney |
| 3.0 | 02/10/19 | Final Version | Updates made following initial user feedback. | Andrew Campan |
| 4.0 | 25/03/21 | Final Version | Updated to reflect new internal sub £150k process | Makaella Allison |

# **Purpose**

This document sets out the process for obtaining quotations for Goods and Services **up to £62,319.58.**

Introduction

###### This Invitation to Quote (ITQ) has been prepared by NHS England and NHS Improvement (the ‘Authority’). The Authority is looking for a Supplier for the provision of a Management Information System (MIS) - ILR Management for NHSE, Choices College. A full description of the requirement is found in section 2.

###### This procurement exercise is being carried out as an Invitation to Quote via a Light Touch Regime, under Education & Training Services, CPV 80000000.

###### 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:

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

Project Team Details and Contract Lead

|  |  |
| --- | --- |
| Name of Team | NHSE, Choices College |
| Name and Title of Contract Lead | Beth Gibb, Business ManagerOlga Lambert, Business Support Officer |

Timeline

|  |  |
| --- | --- |
| **Item** | **Date** |
| ITQ Release Date & Issue on Contract Finder\* | Friday 18th October 2024 |
| ITQ Clarification Deadline | Monday 28th October 2024  |
| ITQ Closing Date | Monday 4th November 2024 – 11:59pm  |
| Estimated Award Date | Friday 29th November 2024 |
| Estimated Contract Commencement Date | Wednesday 1st January 2025 |

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) before **Monday 21st October 2024 – 5pm**. Clarification questions received after this time will not be responded to. All Clarification questions will be responded to within 3 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 | 60% |
| Sustainability and Social Value | 10% |
| Commercial | 30% |

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

|  |  |  |
| --- | --- | --- |
| **No.** | **Question** | **Weighting (%)** |
| 1 | What experience do you have working with Specialist post-16 College and meeting their needs? | 20% |
| 2 | Can you confirm what features listed in the Essential Skills Deliverables section are included in your standard package. Please describe what additional features you are able to provide and note the costs in the Commercial Response Document? | 15% |
| 3 | Please can you provide a sample on what the “online application form will look like” and what possibilities are there to amend and update the form as requested? Will users be able to edit fields directly without seeking support from IT? | 15% |
| 4 | What set up training will you provide for new users and what additional ongoing support will you provide? | 10% |
| 5 | **Social Value**Please demonstrate how your organisation contributes to the wider inclusion of young people with additional needs in further education and wider society? | 10% |
|  | **Commercials**  | 30% |

**Scoring**

**Bidder information**

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

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

**Quality**

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

| **Score** | **Interpretation** |
| --- | --- |
| 4Excellent | The 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.   |
| 3Good | 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.  |
| 2Satisfactory | 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. |
| 1Poor | 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. |
| 0Unacceptable | No response and/or information provided is deemed inadequate to merit a score. |

**Scoring Cost**

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

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

 30 (% 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 30% available.

# **The Requirement**

The main purpose of NHSEs Workforce, Training and Education directive is to improve the quality of healthcare for the people and patients of England through the education, training and lifelong development of NHS staff. There are over 300 different jobs performed by more than one million people in the NHS. Our organisational vision is to ensure that the NHS has the right professionals, with the right skills and values, in the right place, at the right time, to better meet the needs and wants of patients.

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:**

|  |
| --- |
| Choices College is a specialist post 16 institution hosted by NHSE. The college is funded directly via the Education and Skills Funding Agency, commissioning local authorities and DWP. Choices College is looking to award a contract to a provider of a Management Information System for ILR submissions and student data management. |

**Standards and Service Specification:**

|  |
| --- |
| Management Information System (MIS) is necessary to manage funding returns, compliance and funding, objective tracking, evidence capture and submission.The College is contractually obliged by DfE's Educational Skills and Funding agency to submit an Individualised Learner Record (ILR) to ESFA 5 times throughout the academic year at specific times.ESFA funding allocation is calculated based on the data submission for that academic year. |

**Essential Skills Deliverables:**

|  |
| --- |
| A successful supplier will be able to provide a Management Information System with the following features built in:* + - * Self- service application forms
			* bulk enrolment tools
			* Student management - bulk data processing
			* Individualised Learner Record (ILR) Data returns
			* Data validation at data entry
			* FIS reporting
			* Error Proofing
			* Reporting tools –reports in variety of formats
 |

**Service Levels and Key Performance Indicators (KPIs)**:

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| --- |
| The Key Performance Indicators (KPIs) outlined in this business case are tailored to ensure that the selected provider effectively supports Choices College in achieving its educational goals and fulfilling regulatory requirements. Each KPI targets essential areas, including:Productivity - optimising the productivity for effective running of the college, and to the workload of the staff who need to use it.* Measurement: Quarterly reviews with assigned account manager.

Efficiency - is the system working efficiently to provide required functionality outlined in the requirements section? * Measurement: Quarterly reviews with assigned account manager

Delivery/ Implementation - Efficient installation with timely and effective staff training.* Measurement: Review after each session and run an annual survey on training and support.
 |

**Sustainability**:

|  |
| --- |
| Social Sustainability by fostering social sustainability, we strive to build societies where every person can thrive, regardless of their background or circumstances.  |

**Social Value Act:**

|  |
| --- |
| We believe that every young person embarking on a supported internship has the potential to succeed, and we provide skilled, informed support to maximise their potential.We partner with NHS and private businesses, train mentors and provide positive, skill enhancing work environments to give a secure, uplifting work experience for each Intern.Our staff are dedicated to the overall welfare of the Interns and to ensuring that they develop academic, work and life skills across the duration of the course. We work closely with family members and other professionals to benefit the Interns.Choices College not only contributes to the Intern and their journey to employment, but also enables local and NHS partners to enhance inclusion, diversity, and accessibility in their workforce.**Person-centred;** considering the individual needs of all Choices College stakeholders to enable our interns get the best start to their working careers.**Outcome Focused;** creating positive outcomes for the interns and business partners.**Quality driven;** ensuring that we maintain a high standard of support and education.**Excellence;** being the best in our field and transforming societal expectations of people with additional needs. |

**Contract Period:**

|  |
| --- |
| 5 years on 1+1+1+1+1 basis to allow more flexibility commencing 1st January 2025.  |

**Proposed Terms and Conditions**

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

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>.

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:

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

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

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

# Further Bidder Information:

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

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

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

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 1** |  | **Question % Weighting** | 20% |
|  |  |
| *What experience do you have working with Specialist post-16 College and meeting their needs?* |
| **Supplier Response** |
| The maximum total word count for this section is 500 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | 15% |
|  |  |
| Can you confirm what features listed in the Essential Skills Deliverables section are included in your standard package. Please describe what additional features you are able to provide and note the costs in the Commercial Response Document? |
| **Supplier Response** |
| The maximum total word count for this section is 500 |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 3** |  | **Question % Weighting** | 15% |
|  |  |
| *Please can you provide a sample on what the “online application form will look like” and what possibilities are there to amend and update the form as requested? Will users be able to edit fields directly without seeking support from IT?* |
| **Supplier Response** |
| The maximum total word count for this section is 500 |
| **Question 4** |  | **Question % Weighting** | 10% |
|  |  |
| *What set up training will you provide for new users and what additional ongoing support will you provide?* |
| **Supplier Response** |
| The maximum total word count for this section is 500 |
| **Question 5 – Social Value** |  | **Question % Weighting** | 10% |
|  |  |
| Please demonstrate how your organisation contributes to the wider inclusion of young people with additional needs in further education and wider society? |
| **Supplier Response** |
| The maximum total word count for this section is 500  |

B) Commercial

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 6**  |  | **Question % Weighting** | 30% |
|  |  |
|  Please provide a price breakdown using the Excel Sheet provided.  |
| ***SUPPLIERS PLEASE DO NOT ENTER YOUR COMMERCIALS HERE – PLEASE COMPLETE THE EXCEL DOCUMENT “COMMERCIAL BREAKDOWN” AND UPLOAD IT SEPARATE TO THIS DOCUMENT ON ATAMIS.*** |

**C) Confirmation**

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