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| National Framework Agreement for a Fixed Fee Procurement Project Delivery Service Project Reference: F/045/FFPP/21/SM SCHEDULE A FRAMEWORK AGREEMENT SPECIFICATION |

FIXED FEE PROCUREMENT PROJECT DELIVERY SERVICE

This service will be divided into four lots based on the different procurement project types typically carried out within public sector procurement departments. Tenderer’s are invited to bid on one or more of the lots, however any tenderer wishing to bid for Lot 4 must also submit bids for Lots 1, 2 and 3. These lots are as follows:

LOT 1 – Find a Tender Projects

LOT 2 – Framework Mini-Competition Projects

LOT 3 – Project Support

LOT 4 – Project Bundle (Call off contracts will be made up of a combination of the above three types of project. Any call off contract must include a minimum of two of the three different types of projects)

The following sections detail the minimum service required under each lot.

LOT 1: FIND A TENDER PROJECTS

1. Service Offering

This is a full service for the Tenderer to provide a complete end to end procurement process for projects above the defined thresholds under the Public Contracts Regulations 2015. The service provided must be fully compliant with the Public Contracts Regulations 2015, including the relevant advertising within the Find a Tender Service and Contracts Finder. The Tenderer will take full ownership of delivering the project, from the strategy and approach, to the day to day management and all tasks associated with delivering the project.

* 1. Pre-Procurement Process
* Advise client on the procurement processes available and the most suitable route to satisfy their needs;
* Define the appropriate procurement strategy to meet the needs of the client;
* Review and advise on the appropriateness of existing contracts within the client organisation to determine whether they can be better utilised, to aggregate requirements;
* Lead initial market engagement to provide better understanding of the feasibility of the requirements and the capacity of the market to deliver;
* Provide advice on and encourage the inclusion of SMEs;
* Develop and maintain a risk register for the project; and
* Advise on conflicts of interest.
  1. Specification
* Support the identification of client requirements and the development of an appropriate specification from a compliance and procurement perspective. The tenderer will not be required to provide clinical advice or other technical input which remains the responsibility of the client; and
* Review the specification for completeness.
  1. Invitation to Tender Documentation
* Identify relevant terms and conditions for the project;
* Prepare all tender documentation required for the project, including but not limited to:
  + Standard Selection Questionnaire
  + Invitation to Tender
  + Evaluation Criteria
  + Financial and Non-Financial Evaluation documentation
  1. Issue of Tender documentation
* Prepare and post associated Find a Tender Service and Contracts Finder procurement notices electronically
* Management of bidder clarification question process including response to all clarification questions
  1. Post tender
* Evaluation of tender responses
* Management of post tender clarification question process including response to all clarifications
* Award Process (including standstill periods where applicable)
* Preparation of debriefs for all bidders
* If required, facilitate and arrange evaluation briefings, evaluation and moderation meetings and document all outputs
* Facilitate and arrange bidder presentations (if appropriate)
* Prepare contract award documentation
* Prepare ratification reports containing the decision making process on the selection for approval by the client
* Issue award debrief documentation to all bidders and start standstill (if appropriate)
* Negotiation of terms and conditions (if applicable)
* Prepare and post associated Find a Tender Service and Contracts Finder Contract Award Notices
* Provide information to client to ensure new contracts let are recorded in client’s contracts register

1. Programme and Project Management
   1. Ensure project timescales are estimated and agreed with the client prior to project initiation, and that project milestones are met within given deadlines
   2. Provide brief weekly updates to the client including:

* Status of current projects
* Planned projects
* Any issues identified
  1. Provide detailed quarterly reports to the client including:
* Project status
* Savings realised
* Any known service issues
* Identified risks
* Contracts awarded
* Any other reports to be agreed with the client
  1. Attend contract review meetings on a quarterly basis at a location to be agreed between the two parties. The Review Meeting will consist of:
* Update on project plans
* Performance against Key Performance Indicators
* Identified Service issues
* Suggestions for service improvements
  1. Applicable Key Performance Indicators (KPIs) will be agreed between the client and the successful tenderer at call off contract award. The following KPIs will apply as a minimum:
* Work Plan and Project Delivery: Ensure all projects on the work plan are delivered in accordance with individual timelines and relevant procurement regulations. The tenderer will provide a monthly report detailing project title, client lead, value, procurement process, timeline, anticipated savings and current status.
* Audit Compliance: The tenderer is to provide contracts/project information within 48 hours when requested by the client, or it’s appointed external auditors.
* Client Satisfaction: The tenderer must ensure all stakeholders are satisfied with the procurement service. This will be measured through the completion of client feedback forms at the conclusion of each procurement project. Customer satisfaction must be minimum 90%. The client feedback forms will be developed by the tenderer and agreed with the client prior to use.
* Promptness in dealing with client enquiries: The tenderer must respond to all client enquiries within 48 hours of the request.

1. Training, Regulation and Legal Aspects
   1. Maintain up to date knowledge and experience on all procurement related topics, in particular appropriate procedures, processes and policies/legislation, Cabinet Office Policy and strategy with specific understanding of the Health and Public Sectors.
   2. Support the client on any challenges that may arise during and after the procurement process, and provide support on any dispute resolution.
   3. Provide procurement guidance and updates on relevant procurement issues or challenges.
   4. Provide advice on the risks associated with competition, transparency, equal treatment, quality and efficiency of the services being procured.
   5. Implement and maintain an information and security management plan, and if requested, provide evidence of conformance to the Data Protection Act and any associated legislation.
2. Customer Service and Support
   1. Ensure regular communications with nominated client leads.
   2. Escalate any issue that may occur to the relevant senior manager.
   3. Work with a client’s procurement team to identify savings opportunities.
   4. Inform and seek approval for all procurement projects through the delegated point of contact within the client’s team.
   5. Appoint a dedicated account manager as a single point of contact for the client’s procurement team.
   6. Advise on Freedom of Information request and obligations (where these relate to procurement activity undertaken for the client).

LOT 2: FRAMEWORK MINI COMPETITIONS

1. Service Offering

This is a full service for the Tenderer to manage Framework mini-competitions, from seeking buy in to utilising the framework, and managing the engagement of suppliers. The exact scope of this service will vary depending on the mini-competition process specified within the chosen framework. A typical mini competition will involve the tenderer carrying out the following:

* Review the chosen framework to ensure it offers adequate governance and covers the requirement
* Support the development of a detailed specification of the requirements in order to undertake the mini competition process. The tenderer will not be required to provide clinical advice or other technical input which remains the responsibility of the client
* Review the specification for completeness
* Issue Invitation to Quote to all suppliers awarded on the chosen Framework Agreement
* Carry out evaluation of the responses in accordance with the evaluation criterion detailed within the chosen Framework Agreement
* Produce recommendation to award for client to review
* Issue notification of award to successful suppliers and carry out a voluntary standstill period
* Prepare and Publish contract award notice in Contracts Finder

1. Programme and Project Management
   1. Provide brief weekly updates to the client including:

* Status of current projects
* Planned projects
* Any issues identified
  1. Provide detailed quarterly reports to the client including:
* Project status
* Savings realised
* Any known service issues
* Identified risks
* Contracts awarded
* Any other reports to be agreed with the client
  1. Applicable Key Performance Indicators (KPIs) will be agreed between the client and the successful tenderer at call off contract award. The following KPIs will apply as a minimum:
* Work Plan and Project Delivery: Ensure all projects on the work plan are delivered in accordance with individual timelines and relevant procurement regulations. The tenderer will provide a monthly report detailing project title, client lead, value, procurement process, timeline, anticipated savings and current status.
* Audit Compliance: The tenderer is to provide contracts/project information within 48 hours when requested by the client, or it’s appointed external auditors.
* Client Satisfaction: The tenderer must ensure all stakeholders are satisfied with the procurement service. This will be measured through the completion of client feedback forms at the conclusion of each procurement project. Customer satisfaction must be minimum 90%. The client feedback forms will be developed by the tenderer and agreed with the client prior to use.
* Promptness in dealing with client enquiries: The tenderer must respond to all client enquiries within 48 hours of the request.

1. Training, Regulation and Legal Aspects
   1. Maintain up to date knowledge and experience on all procurement related topics, in particular appropriate procedures, processes and policies/legislation, Cabinet Office Policy and strategy with specific understanding of the Health and Public Sectors.
   2. Support the client on any challenges that may arise during and after the procurement process, and provide support on any dispute resolution.
   3. Provide procurement guidance and updates on relevant procurement issues or challenges.
   4. Provide advice on the risks associated with competition, transparency, equal treatment, quality and efficiency of the services being procured.
   5. Implement and maintain an information and security management plan, and if requested, provide evidence of conformance to the Data Protection Act and any associated legislation.
2. Customer Service and Support
   1. Ensure regular communications with nominated client leads.
   2. Escalate any issue that may occur to the relevant senior manager.
   3. Work with a client’s procurement team to identify savings opportunities.
   4. Inform and seek approval for all procurement projects through the delegated point of contact within the client’s team.
   5. Appoint a dedicated account manager as a single point of contact for the client’s procurement team.
   6. Advise on Freedom of Information request and obligations (where these relate to procurement activity undertaken for the client).

LOT 3: PROJECT SUPPORT

1. Service Offering

Under this service the client will provide a procurement lead, and the Tenderer will provide project support.

This service includes as a minimum:

Pre-Procurement Process

* Advise client on the procurement processes available and the most suitable route to satisfy their needs;
* Define the appropriate procurement strategy to meet the needs of the client;
* Review and advise on the appropriateness of existing contracts within the client organisation to determine whether they can be better utilised, to aggregate requirements;
* Business case development;
* Strategy development;
* Lead initial market engagement to provide better understanding of the feasibility of the requirements and the capacity of the market to deliver;
* Provide advice on and encourage the inclusion of SMEs;
* Develop and maintain a risk register for the project; and
  + Advise on conflicts of interest.

Specification

* Support the identification of client requirements and the development of an appropriate specification from a compliance and procurement perspective. The tenderer will not be required to provide clinical advice or other technical input which remains the responsibility of the client; and
* Review the specification for completeness.

Invitation to Tender Documentation

* Identify relevant terms and conditions for the project;
* Prepare all tender documentation required for the project, including but not limited to:
  + Standard Selection Questionnaire
  + Invitation to Tender
  + Evaluation Criteria
  + Financial and Non-Financial Evaluation documentation

Post Contract Award

* Contract Management
* Supplier Relationship Management

Other:

* Development of project plan and Gantt chart for the project
* Set up suppliers on e-tendering portal (if required)
* Respond to supplier queries and clarification questions
* Carry out compliance check and initial evaluation of tender responses, prior to the client carrying out the full technical and commercial, including but not limited to:
  + Word Count
  + Document format
  + Pass/fail elements of the SQ
* Produce draft Board Ratification Report
* Development of draft debrief documentation
* Issue debrief documentation
* Produce draft Find a Tender Service and Contracts Finder Procurement Notices

1. Programme and Project Management
   1. Provide brief weekly updates to the client including:

* Status of current projects
* Planned projects
* Any issues identified
  1. Provide detailed quarterly reports to the client including:
* Project status
* Savings realised
* Any known service issues
* Identified risks
* Contracts awarded
* Any other reports to be agreed with the client
  1. Applicable Key Performance Indicators (KPIs) will be agreed between the client and the successful tenderer at call off contract award. The following KPIs will apply as a minimum:
* Work Plan and Project Delivery: Ensure all projects on the work plan are delivered in accordance with individual timelines and relevant procurement regulations. The tenderer will provide a monthly report detailing project title, client lead, value, procurement process, timeline, anticipated savings and current status.
* Audit Compliance: The tenderer is to provide contracts/project information within 48 hours when requested by the client, or it’s appointed external auditors.
* Client Satisfaction: The tenderer must ensure all stakeholders are satisfied with the procurement service. This will be measured through the completion of client feedback forms at the conclusion of each procurement project. Customer satisfaction must be minimum 90%. The client feedback forms will be developed by the tenderer and agreed with the client prior to use.
* Promptness in dealing with client enquiries: The tenderer must respond to all client enquiries within 48 hours of the request.

1. Training, Regulation and Legal Aspects
   1. Maintain up to date knowledge and experience on all procurement related topics, in particular appropriate procedures, processes and policies/legislation, Cabinet Office Policy and strategy with specific understanding of the Health and Public Sectors.
   2. Support the client on any challenges that may arise during and after the procurement process, and provide support on any dispute resolution.
   3. Implement and maintain an information and security management plan, and if requested, provide evidence of conformance to the Data Protection Act and any associated legislation.
2. Customer Service and Support
   1. Ensure regular communications with nominated client leads.
   2. Escalate any issue that may occur to the relevant senior manager.
   3. Work with a client’s procurement team to identify savings opportunities.
   4. Inform and seek approval for all procurement projects through the delegated point of contact within the client’s team.
   5. Appoint a dedicated account manager as a single point of contact for the client’s procurement team.
   6. Advise on Freedom of Information request and obligations (where these relate to procurement activity undertaken for the client).

LOT 4: PROJECT BUNDLE

1. Service Offering

This is a volume driven service, whereby the client commits to a number of projects from the outset. Call off contracts will be made up of a minimum of two different types of the following projects:

* Lot 1 Find a Tender Projects
* Lot 2 Framework Mini Competitions
* Lot 3 Project Support

The specification for each project type is as described in the specifications for Lots 1, 2 and 3 above.

The purpose of this Lot 4 is to offer the client volume driven discounts, based on the total number of projects required, rather than the number of a particular type of project. This service must allow the client to commit to contracting for a number of procurement projects within the contract period, without the need to specify the number of each type of project upfront. This is to provide flexibility to the client, whilst ensuring they obtain volume based discounts.

There are no minimum numbers of each particular project type within each call off contract, but each contract must contain a minimum of two different types of project. The table below provides some example call off contracts. This table is provided for information only.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Example Contract | Total number of projects committed to under contract | Lot 1 Find a Tender Projects | Lot 2 Framework Mini Competitions | Lot 3 Project Support |
| Contract A | 10 | 6 | 4 | 0 |
| Contract B | 6 | 0 | 3 | 3 |
| Contract C | 15 | 5 | 5 | 5 |
| Contract D | 12 | 1 | 1 | 10 |

1. Programme and Project Management
   1. Provide brief weekly updates to the client including:

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* Any issues identified
  1. Provide detailed quarterly reports to the client including:
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* Savings realised
* Any known service issues
* Identified risks
* Contracts awarded
* Any other reports to be agreed with the client
  1. Applicable Key Performance Indicators (KPIs) will be agreed between the client and the successful tenderer at call off contract award. The following KPIs will apply as a minimum:
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* Promptness in dealing with client enquiries: The tenderer must respond to all client enquiries within 48 hours of the request.

1. Training, Regulation and Legal Aspects
   1. Maintain up to date knowledge and experience on all procurement related topics, in particular appropriate procedures, processes and policies/legislation, Cabinet Office Policy and strategy with specific understanding of the Health and Public Sectors.
   2. Support the client on any challenges that may arise during and after the procurement process, and provide support on any dispute resolution.
   3. Provide procurement guidance and updates on relevant procurement issues or challenges.
   4. Provide advice on the risks associated with competition, transparency, equal treatment, quality and efficiency of the services being procured.
   5. Implement and maintain an information and security management plan, and if requested, provide evidence of conformance to the Data Protection Act and any associated legislation.
2. Customer Service and Support
   1. Ensure regular communications with nominated client leads.
   2. Escalate any issue that may occur to the relevant senior manager.
   3. Work with a client’s procurement team to identify savings opportunities.
   4. Inform and seek approval for all procurement projects through the delegated point of contact within the client’s team.
   5. Appoint a dedicated account manager as a single point of contact for the client’s procurement team.
   6. Advise on Freedom of Information request and obligations (where these relate to procurement activity undertaken for the client).