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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

CDAO Staff Engagement Project

**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**

# **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 Regional Patient Engagement events: this research initiative aims to support the implementation and adoption of new services and inform our strategic planning through a series of regional Patient Experience / Engagement events or initiatives.

###### A full description of the requirement is found in section 2.

###### This procurement exercise is being carried out as an Invitation to Quote

###### The Authority has taken reasonable care to ensure that the information provided is accurate in all material respects. However, the Bidders attention is drawn to the fact that no representation, warranty or undertaking is given by The Authority in respect of the information provided in respect of this transaction and/or any related transaction.

###### The Authority does not accept any responsibility for the accuracy or completeness of the information provided and shall not be liable for any loss or damage arising directly or indirectly as a result of reliance on this ITT or any subsequent communication.

###### No warranties or opinions as to the accuracy of any information provided in this ITQ Pack shall be given at any stage by The Authority.

###### Any person considering making a decision to enter into contractual relationships with The Authority or any other person on the basis of the information provided should make their own investigations and form their own opinion of The Authority. The attention of Bidders is drawn to the fact that, by issuing this ITQ, The Authority is in no way committed to awarding any contract and that all costs incurred by Bidder in relation to any stage of the Tender process are for the account of the relevant Bidder only.

###### In accordance with The Authority’s internal financial instructions and general principles applicable to public procurement, The Authority seeks best value for money in terms of the Contract reached with the successful Bidder.

###### The Authority has endeavored, therefore, to express as clearly as possible in this ITQ the terms on which it would propose to contract with the successful Bidder and in particular the obligations, risks and liabilities which it expects to become the responsibility of the successful Bidder.

This document contains the following sections:

* **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 | Strategic Communications, Strategy and Development, Chief Data and Analytics Officer |
| Name and Title of Contract Lead | Rebecca Conyers-Kelly, Head of Communications and Engagement |

Timeline

|  |  |
| --- | --- |
| **Item** | **Date** |
| ITQ Release Date & Issue on Contract Finder\* | 16.11.2022 |
| ITQ Clarification Deadline | 23.11.2022 |
| ITQ Closing Date | 30.11.2022 |
| Estimated Award Date | 16.12.2022 |
| Estimated Contract Commencement Date | 19.12.2022 |

The timeline is indicative and may be subject to change.

\*min 2 weeks on Contracts Finder for complex requirements, otherwise a minimum of 1 week

Supplier Clarification Question Process

All clarification questions relating to this ITQ must be submitted via the procurement portal route (Atamis) within 5 calendar days of receiving the ITQ. Clarification questions received after this time will not be responded to. All Clarification questions will be responded to within 2 working days of the date received.

All clarification questions received via other routes will not be reviewed and responded to.

**Please Note: -** To ensure an open and fair process is followed, all bidders will receive a copy of the question(s) and answer(s).

Evaluation Criteria

The purpose of evaluation in the procurement process is to establish which supplier(s) have submitted the best quotation; ensuring that the assessment of quotes is undertaken in a transparent, fair and consistent manner so that an effective comparison can be made.

The Authority, reserves the right to accept or reject all or any part of the quotation if you have failed to provide the information requested in this quotation or you have submitted any modification or any qualification to the terms and conditions of contract.

The Authority does not bind itself to accept the lowest priced, or any quotation, nor guarantee any value or volume and shall not be liable to accept any costs you have incurred in the production of your quotation.

The Authority will check each quotation and submission for completeness and compliance with the requirements in this Invitation to Quote document, thus, you should ensure that you carefully examine this document in full.

Quotes will be evaluated on the following Quality and Costs basis;

|  |  |
| --- | --- |
| **Section** | **Weighting (%)** |
| Technical/Quality  Including Sustainability and Social Value | 70 |
| Commercial | 30 |

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

|  |  |
| --- | --- |
| **Question** | **Weighting (%)** |
| 1. Based on the brief, how would you recommend we undertake this piece of work in order for us to understand the attitudes towards new ways of working within our team? | 15% |
| 2. Can you demonstrate a time when you have run a similar project and tell us what the outcome was? | 15% |
| 3. Are you able to independently run a survey and focus groups for our staff and can you talk us through how you’d do this? | 15% |
| 4. Explain how you’d be able to deliver this piece of work within our timeframes and how you’d deliver the research and analysis. | 15% |
| 5. Social Value related Question: How will you support meeting the requirements of this ITQ with social value and environmental commitments in mind, both in terms of the projects and as an organisation?  For more information on the social value model –  <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/940828/Social-Value-Model-Quick-Reference-Table-Edn-1.1-3-Dec-20.pdf> | 10% |
| Commercial / Pricing | 30% |
| **Total** | **100%** |

**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.

**Note:** There is a minimum quality threshold of 2 out of 4 for all the above assessment questions.

| **Score** | **Interpretation** |
| --- | --- |
| 4  Excellent | The Tenderer’s response provides full confidence that the Tenderer understands and can deliver the Requirements well and addresses all of the requirements set out in the question. |
| 3  Good | The Tenderer’s response provides a good level of confidence that the Tenderer understands and can deliver the services and the Tenderer's response addresses all or most of the requirements set out in the question. |
| 2  Satisfactory | The Tenderer’s response provides a satisfactory level of confidence that the Tenderer understands and can deliver the services and the Tenderer's response addresses at least some of the requirements set out in the question. However, the response is lacking in some areas. |
| 1  Poor | There are weaknesses (or inconsistency) in the Tenderer’s understanding of the services and/or Tenderer's response fails to address some or all of the requirements set out in the question. |
| 0  Unacceptable | No response and/or information provided is deemed inadequate to merit a score. |

**Scoring Cost**

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

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

x (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.

**Please note that there is a maximum capped budget for this work of £51,801.00 (VAT inclusive), £43,167.50 (VAT excluded). Bids above this will be disqualified.**

# **The Requirement**

The Requirement is detailed below which provides background to the project/business need, the standards or specification required alongside the essential supplier skills and the objectives of the requirement.

**Background Information:**

|  |
| --- |
| In response to the pandemic, the CDAO team within NHS England started using a new data platform – Foundry – to provide the information needed to support the pandemic response.  Foundry has shown the real benefits of real time, high quality data. However, only a small proportion of the c. 800 team members have used it, and there is some resistance to new ways of working.  The CDAO team are considering how to bring people with them on a change journey and generate excitement about the potential of new ways of data usage.  There is a need for research and engagement to understand both the benefits and blockers to using our current data platforms and exploring how we can take staff on this change journey as we look to implement a new data platform in the future. |

**Standards and Service Specification:**

|  |
| --- |
| **This service should include the following items and be available as defined below:**   * The service must undertake a survey for approximately 800 NHSE CDAO staff and the means and methods to undertake deep dives in the research. * The service must first offer a 10-minute survey that will be shared with all CDAO colleagues and explore the following:   + How colleagues feel about the use of data platforms in the NHS – including the benefits and barriers   + Perceptions of new ways of working   + Lessons learned as key users of the platform * The service must expect the survey to be live for 2-3 weeks and include questions on team culture and work and attitudes towards change. * The service must also offer 8-10 interviews with senior level stakeholders to understand the wider perceptions of the team and how they work. * The service must then offer a further 6-10 online focus groups to entry and mid-level staff members to explore views in detail on the back of the survey. The focus groups must also focus on the future direction of CDAO and the role that data platforms could play as part of this. * The service must carry out analysis of the data and findings pulled together from across the programme. * The service must also produce the following:   + A presentation with detailed findings from the online survey   + A verbal discussion of the results from the senior stakeholder interviews   + A verbal discussion of the results from the deep dive focus groups   + A full report including a summary of the key findings and supporting detail and recommendations for building support of the change journey. * The service must finally deliver either a face to face or online co-creation workshop to collaboratively develop a case for change and a vision for the Foundry data platform. |

**Essential Skills Deliverables:**

|  |
| --- |
| The following are the essential skills required from the supplier for them to successfully deliver this work:   * Experience of delivering staff research projects in large public sector directorates. * Experience of delivering focused qualitative research in respect of staff engagement. * Experience of ExCollecting data and articulating the findings. * Knowledge of the importance of neutral bias when supporting the delivery of research projects. * Knowledge of confidentiality requirements when delivering research work in the Public Sector. * Knowledge of the working environment, policies and politics impacting modern NHS operations. * Strategic insight to help unlock new thinking, shedding new light on experiences, views, feelings and behaviours. * Integrity. * Inclusivity and empathy. |

**Deliverables**:

|  |
| --- |
| The following are the deliverables associated with this procurement:   * Provision of coaching service as defined within the standards and service specification section above * Additional aims from this project include aims to:   + Understand attitudes towards new ways of working, within the team –   + including perceived benefits and barriers.   + Understand the role that Foundry data platform has played in shaping these perceptions.   + Understand wider views of external suppliers of the Foundry Data Platform and their relationship with the NHS.   + Co-create a vision for new ways of working, that generates excitement and buy-in across the team. |

**Proposed Terms and Conditions**

The proposed terms and conditions for this engagement are the NHS Standard Terms and Conditions of services: Purchase Order Version.

No amendments shall be considered or accepted in relation to the Terms and Conditions. Failure to accept the terms will result in disqualification.

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

The Purchase Order will serve as the contract.

1. Responding to ITQ

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

### In evaluating Tenders, the Authority will only consider information provided in the Supplier Response Form.

### Bidders should not assume that the Authority has any prior knowledge of the Bidder, its practice or reputation, or its involvement in existing services, projects or procurements.

### If there are any questions that do not apply to a Bidder, please answer with a N/A and explanation where appropriate.

### Where any section of the ITQ indicates a word limit, any response will be reviewed to that word limit and any additional information beyond that word limit will not be considered. Bidders must provide a word count for each question response.

###### The Authority may at its own absolute discretion extend the Deadline for receipt of Tenders specified in the timetable. Any extension to the Deadline granted under this paragraph will apply to all Bidders.

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

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

###### The Tender and any documents accompanying it must be formatted in Word or Excel as appropriate and be in the English language.

###### Price and any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Tender pricing must be provided excluding Value Added Tax (VAT).

Bidders Details:

The following is an outline of what will be required and found on Atamis. **Suppliers please download this Form, complete it and upload it as an attachment to your proposal on Atamis.**

*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

Suppliers 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** | 15% |
|  |  | |
| Based on the brief, how would you recommend we undertake this piece of work in order for us to understand the attitudes towards new ways of working within our team? | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 200 words | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | 15% |
|  |  | |
| Can you demonstrate a time when you have run a similar project and tell us what the outcome was? | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 200 words | | | |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Question 3** | |  | | **Question % Weighting** | | 15% | |
|  | |  | | | |
| Are you able to independently run a survey and focus groups for our staff and can you talk us through how you’d do this? | | | | | | | |
| **Supplier Response** | | | | | | | |
| The maximum total word count for this section is 200 words | | | | | | | |
| **Question 4** | |  | | **Question % Weighting** | | 15% | |
|  | |  | | | |
| Explain how you’d be able to deliver this piece of work within our timeframes and how you’d deliver the research and analysis. | | | | | | | |
| **Supplier Response** | | | | | | | |
| The maximum total word count for this section is 200 words | | | | | | | |
| **Question 5** |  | | **Question % Weighting** | | 10% | |
|  | |  | | | |
| Social Value related Question: How will you support meeting the requirements of this ITQ with social value and environmental commitments in mind, both in terms of the projects and as an organisation?  For more information on the social value model – <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/940828/Social-Value-Model-Quick-Reference-Table-Edn-1.1-3-Dec-20.pdf> | | | | | | |
| **Supplier Response** | | | | | | |
| The maximum total word count for this section is 200 words | | | | | | |

B) Commercial

|  |  |
| --- | --- |
| **Commercial** |  |
|  |  |
| Please download and complete the attached “Pricing Breakdown” providing a full cost breakdown to undertake the work. Your breakdown should also include the total cost exclusive of VAT to the Authority. | | |
| **Supplier Response** | | |
| *PLEASE DO NOT ENTER THE COSTING HERE* | | |

**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’*: | | |
| **Supplier Response** | | |
| *Electronic Signature Insert……..*  *Name:*  *Job Title:*  *Date:* | | |