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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

Virtual Coaching Sessions

2022 - 2023

**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 Virtual Coaching Sessions. 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 | Patrick Harty |
| Name and Title of Contract Lead | Data Management & Integration Services (DMIS) |

Timeline

|  |  |
| --- | --- |
| **Item** | **Date** |
| ITQ Release Date & Issue on Contract Finder\* | Friday 21st October 2022 |
| ITQ Clarification Deadline | Friday 28th October 2022 |
| ITQ Closing Date | Friday 4th November 2022 |
| Estimated Award Date | Friday 18th November 2022 |
| Estimated Contract Commencement Date | Monday 21st November 2022 |

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) 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 | 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:

|  |  |
| --- | --- |
| **Question** | **Weighting (%)** |
| Demonstrate subject matter expertise in the delivery of effective coaching for middle and upper middle management staff? | 15% |
| Demonstrate subject matter expertise in the delivery of coaching to staff during a period of significant organizational change? | 15% |
| Outline your approach to delivering the virtual coaching requirements in the specification | 15% |
| Supplier should demonstrate familiarity with delivering coaching to public sector staff, specifically in the context of the current NHS operational environment | 15% |
| Please describe how your coaching will support the wellbeing of the participants during the current period of organizational change at NHS England & Improvement  (Social Value Question: Theme 5 – Health & Wellbeing) | 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 £32,400(VAT inclusive), £27,000 (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:**

|  |
| --- |
| The Chief Data & Analytics Office [CDAO] department with NHS England & Improvement [NHS EI] seeks a supplier to deliver a Virtual Coaching Service to its staff as part of its learning and development offering.  A virtual coaching service has been offered during the duration of the Covid 19 pandemic and was offered to middle and upper middle management candidates. NHS England and Improvement is undergoing a period of organisational change as it merges with NHS Digital and the Health Education England, this specification is to procure a supplier to deliver this service to CDAO during this period of transformation. |

**Standards and Service Specification:**

|  |
| --- |
| This service should include the following items and be available as defined below:   * The service must be available from November 2022 to June 2023 (8 months). * The service must offer individual 1:1 coaching sessions for up to 16 delegates * The service must offer coaching sessions monthly * The service must include a total of 64 individual coaching sessions across the duration of the service * This coaching is to be delivered virtually to staff members within CDAO.. * Provision of a plan on how the coaching service will be delivered to delegates. * Any quote must include any expected expenses incurred in the routine delivery of this service to ensure the total cost for the operation of this service is defined. |

**Essential Skills Deliverables:**

|  |
| --- |
| The following are the essential skills required from the supplier for them to successfully deliver this:   * Experience of delivering coaching sessions to middle and senior management level. * Experience of delivering coaching and development support to staff during periods of significant organisational change * Experience of delivering coaching, and also leadership development to NHS staff. * Knowledge of public sector and NHS HR, recruitment and workforce policies. * Knowledge of the working environment, policies and politics impacting modern NHS operations. |

**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 learning aims to include development of:   + Consultancy skills   + Defining individual career goals   + Empowerment and Resilience   + Leadership skills   + Managing organizational change |

**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% |
|  |  | |
| Demonstrate subject matter expertise in the delivery of effective coaching for middle and upper middle management staff? | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 500 words | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | 15% |
|  |  | |
| Demonstrate subject matter expertise in the delivery of coaching to staff during a period of significant organizational change? | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 500 words | | | |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Question 3** |  | | **Question % Weighting** | | 15% | | |
|  | |  | | | | |
| Outline your approach to delivering the virtual coaching requirements in the specification. | | | | | | | |
| **Supplier Response** | | | | | | | |
| The maximum total word count for this section is 500 words | | | | | | | |
| **Question 4** |  | | **Question % Weighting** | | 15% | | |
|  | |  | | | | |
| Supplier should demonstrate familiarity with delivering coaching to public sector staff, specifically in the context of the current NHS operational environment. | | | | | | | |
| **Supplier Response** | | | | | | | |
| The maximum total word count for this section is 500 words | | | | | | | |
| **Question 5** | |  | | **Question % Weighting** | | 10% |
|  | |  | | |
| Please describe how your coaching will support the wellbeing of the participants during the current period of organizational change at NHS England & Improvement  (Social Value Question: Theme 5 – Health & Wellbeing) | | | | | | |
| **Supplier Response** | | | | | | |
| The maximum total word count for this section is 500 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** | | |
|  | | |

**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:* | | |