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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

Hackathons and Learnathons

**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 £75,000 (£90,000 including VAT).**

# **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 number of learnathon and hackathon events for the last three months of 22/23 financial year, January 2023 to March 2023.

###### This procurement exercise is being carried out as an Invitation to Quote which will be published through the Government Contracts Finder portal.

###### 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 | Architecture Team, Chief Technology Office, Transformation Directorate, NHS England |
| Name and Title of Contract Lead | Ian Townend |

Timeline

|  |  |
| --- | --- |
| **Item** | **Date** |
| ITQ Release Date & Issue on Contract Finder\* | 19/12/2022 |
| ITQ Clarification Deadline | 27/12/2022 |
| ITQ Closing Date | 5/1/2023 – 12noon |
| Estimated Award Date | w/c 16/1/2023 |
| Estimated Contract Commencement Date | w/c16/1/2023 |

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 3 (this can be amended according to the project timeline) 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 (this can be amended according to the project timeline) 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 (%)** |
| 1 Please provide examples that demonstrate your experience, knowledge and skills of providing an end to end service in relation to the management of hackathons and Learnathons | 20% |
| 2 Please provide examples that demonstrate your experience of running events that focus on standards and interoperability | 20% |
| 3 Please provide examples of or links to materials, information and supporting documents in relation to previous hackathons and learnathons | 10% |
| 4 Please provide evidence that demonstrates success for both the client and attendees with recent testimonials and feedback | 10% |
| 5 Please provide evidence of the value delivered as part of this procurement which goes wider to improvements to the economic, social and environmental well-being of the local area. How will you consider equality and diversity in the provision and operation of your services ? | 10% |
| 6 Please provide a cost breakdown to undertake the work | 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** |
| --- | --- |
| 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

30 x (% 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 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 Architecture team within the Chief Technology Office of the Transformation Directorate in NHS England works closely with other* *NHSE teams and* *NHSD to drive the digital transformation of care. There is a need to engage with services and suppliers to ensure that consultation regarding interoperability is undertaken to ensure the development of solutions are fit for purpose and that learning is shared.*    *This work requires a supplier to develop and provide* *a number of hackathon and learnathon events for the last three months of 22/23* *financial year, over the period January 2023 to March 2023.*    *The supplier will be required to provide specialist resources for the planning,* *preparation, and facilitation of these events with a view to supporting greater interoperability across health and social care in the UK.*    *Hackathons and learnathons may be focused on the needs of (as well as connectivity across or within) one or more shared care records, technical ‘building blocks’ to support interoperability, or providing an opportunity for education around and testing of new solutions prior to consideration for wider implementation.*    *These events bring together system suppliers and NHS Providers to* *actually use interoperability standards and profiles to make interoperability happen – each event would normally have at least one focus area such as Transfers of care, Medicine reconciliation etc so that those attending can focus on those areas and actually produce code that transfers data between systems.*    *The events will need to have been planned,* *promoted, and supported by the chosen supplier to ensure that all the preparations prior to the event and all post event activities are undertaken to make the event a success – the key deliverables outline specific activities – to make the event a success takes a significant amount of time to plan, run and feedback.*    *The* *CTO (Chief Technology Officer) team within the Transformation Directorate of NHSE want to run these events to support the delivery of the objectives in the NHS Long Term Plan and the Tech Vision to support system suppliers and NHS Providers to* *actually implement interoperability.* |

**Standards and Service Specification:**

|  |
| --- |
| *The specific output of the request is to provide the following throughout the period of the*  *service provision*   * *identify themes for sessions (including setting priorities, aims and educational potential)* * *identify and engage key stakeholders and appoint session leads* * *liaise with and engage subject matter experts who will act as stream facilitators (primarily from the relevant NHS England and NHS Digital teams)* * *engage with session leads and attendees to build a planning committee for each technical ‘stream’* * *plan, coordinate and promote pre-hackathon planning calls to support technical preparation* * *produce and publish planning call notes and recordings via social media channels* * *design and arrange production of all event banners and marketing materials* * *create and promote event listing for publication across all channels (website, ticketing platform and social media)* * *develop and coordinate completion of pre-hackathon participant questionnaire (to support technical preparation)* * *produce,* *manage, and issue invitations to all relevant stakeholders and oversee protection of attendee personal data* * *source and confirm locations,* *venues, and catering (if applicable)* * *liaise with venue to ensure technical facilities are made available (e.g. adequate Wi-Fi, power sources, repeater screens, microphones, break-out areas)* * *identify potential sponsors and liaise to agree sponsorship agreement* * *create housekeeping materials such as sign in sheets, name badges and table instructions* * *registration and coordination of attendees, session leads and speakers on the day* * *coordinate and liaise with venue to ensure staff are prepared and the event runs smoothly* * *develop and collate presentations and slide decks* * *provide technical and administrative support at sessions* * *organise and promote post-event networking sessions (including venue sourcing,* *sponsorship, and catering requests)* * *deliver social media narrative prior to, during and following the event* * *create and ensure the smooth running of interactive online voting poll* * *collate,* *produce, and publish post-hackathon communications, including output blogs, to be shared and promotion on a variety of channels including FutureNHS* * *coordinate and manage financing and invoicing around event*     *Previous demonstrable experience of managing the end to end management of hackathons and learnathons is required to deliver this work.*    *There is an available budget of £75,000 excluding VAT for this work and it is expected that the service provision will start as soon as the contract is awarded hopefully early January 2023 and is planned to run until 31st March 2023.* |

**Essential Skills Deliverables:**

|  |
| --- |
| *The supplier will be expected to have the skills,* *experience, and opportunities to deliver the outputs and deliverables. They should have access to a wide range of stakeholders through existing networks and experience of working with large organisations to deliver technological and change programmes.*    *There will be a requirement for the supplier to be able to bring together individuals, vendors, standards organisations and health and care providers who will work together collaboratively to accelerate the development of open standards for interoperability in the UK health and social care sector.*    *The work will require the supplier to be able to work with a variety of organisations involved in data exchanges between the different care domain systems e.g.* *GP, acute, community, mental health, child health,* *maternity, and social care.* |

**Deliverables**:

|  |
| --- |
| *This work package will support the Architecture team within the CTO with the provision of a number of hackathon and learnathon events for the last three months of 22/23 financial year, January 2023 to March 2023.*  *This work package will deliver:-*   * *a consultation to determine a set of topics to be covered* * *a set of hackathons bringing together a group of organisations and provider organisations to develop a solutions to specific problems* * *a set of learnathons associated with the hackathon topics to ensure that participants are able to understand in detail the area they are working on the be the most effective during the hackathon* * *a series of case studies following these events to support what has happened during the events*   *This work package will require engagement across teams within national bodies such as NHSX, NHS E/I, NHS Digital as well as local provider organisations and system suppliers.*  *Hackathon and learnathons bring together system suppliers and NHS Providers to actually use interoperability standards and profiles to make interoperability happen – each event would normally have at least one focus area such as Transfers of care, Medicine reconciliation etc so that those attending can focus on those areas and actually produce code that transfers data between systems. The supplier will plan, promote, and support the event to ensure that all the preparations prior to the event and all post event activities are undertaken to make the events a success – the key deliverables outline specific activities – to make these events a success takes a significant amount of time to plan, run, and feedback.* |

**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. 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% |
|  |  | |
| 1 Please provide examples that demonstrate your experience, knowledge, and skills of providing an end to end service in relation to the management of hackathons and Learnathons | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 1,000 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | 20% |
|  |  | |
| 2 Please provide examples that demonstrate your experience of running events that focus on standards and interoperability | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 1,000 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 3** |  | **Question % Weighting** | 10% |
|  |  | |
| 3 Please provide examples of or links to materials, information and supporting documents in relation to previous hackathons and learnathons | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 1,000 | | | |
| **Question 4** |  | **Question % Weighting** | 10% |
|  |  | |
| 4 Please provide evidence that demonstrates success for both the client and attendees with recent testimonials and feedback | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 1,000 | | | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 5** |  | **Question % Weighting** | 10% |
|  |  | |
| 5 Please provide evidence of the value delivered as part of this procurement which goes wider to improvements to the economic, social and environmental well-being of the local area. How will you consider equality and diversity in the provision and operation of your services? | | | |
| **Supplier Response** | | | |
| The maximum total word count for this section is 1,000 | | | |

B) Commercial

|  |  |
| --- | --- |
| **Commercial** |  |
|  |  |
| Please provide a cost breakdown to undertake the work in the ‘Supplier Response’ box below. Your breakdown should also include the total cost exclusive of VAT to the Authority. | | |
| **Supplier Response** | | |
| *SUPPLERS PLEASE DO NOT ENTER THE COSTING HERE – COMPLETE AND ATTACH THE COMMERCIALS USING THE EXCEL DOCUMENT ATTACHED* | | |

**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:* | | |