

INVITATION TO QUOTE

FOR A HEALTH AND WELLBEING SURVEY

REF: DN448442

**INSTRUCTIONS TO QUOTE**

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1. **INTRODUCTION**
   1. The Council is responsible for improving the health of the people of Warrington.
   2. In order to do this effectively, it is important that the Council understands the current lifestyle and health status of the population and the factors that impact this.
   3. The information has been gathered previously via large scale population health and wellbeing surveys.
   4. The intention is to undertake a comprehensive, large scale survey of adult residents to update the information currently held from previous local lifestyle surveys.

1. **INSTRUCTIONS FOR SUBMITTING YOUR QUOTE**

2.1 General Terms

2.1.1 Bidders are advised to consider the request for Quotation and associated documents in detail in order to satisfy themselves as to the nature and extent of the requirements. Bidders are responsible for ensuring that they are fully familiar with the nature and extent of the requirements described in the Invitation to Quote for the service and shall obtain for themselves at their own expense all information necessary for the preparation of their tenders.

2.1.2 Quotes shall be submitted using the Council’s electronic tendering system the Chest at [www.the-chest.org.uk](http://www.the-chest.org.uk). You should complete your response using the Questionnaires contained within the Chest, details of how to do this can be found in the help sections of the Chest.

* + 1. The Request for Quotation and associated documents shall be treated as private and confidential. Bidders shall not disclose the fact that they have been invited to quote, release details of the Invitation to Quote and its associated documents other than on an ‘in confidence’ basis those who have a legitimate need to know; or with whom Bidders need to consult for the purpose of preparing the Quote. The request for Quotation and associated documents shall remain the property and copyright of the Council.

2.1.4 Where assessment questions are set within the Chest and bidders are required to answer all the questions in the Chest. Tenderers responses will remain confidential and will only be visible to the tender evaluation panel.

2.1.5 Bidders requesting clarifications and/or raising any questions shall do so through the Chest and not by any other means. This is to ensure the electronic tender process and audit protocols are adhered to. If a bidder has any questions about the request for Quotation, such questions should be submitted to the Council using the ‘message’ facility within the opportunity on the Chest. A copy of the question and a copy of the written reply may be circulated to all bidders with the anonymity of the bidder preserved. Any questions must be submitted no later than Noon on Friday 21st February 2020.

2.1.6 The specification contained within this document will together with the tendered prices and terms and conditions form the final agreement.

2.1.7 Only quotes submitted strictly in accordance with the Invitation to Quote and these instructions will be accepted for consideration.

2.1.8 A quote submitted in accordance with this Invitation to Quote will be deemed to remain open for acceptance or non-acceptance by the Council for a period of 90 days from the closing date stipulated.

2.1.9 The Council does not bind itself to accept the lowest or any quotation.

2.1.10 The Council may, and hereby reserves the right to, alter the content but not the intention of the Request for Quotation. The Council will forward these amendments, in writing, to all interested parties via the Chest. No person other than the Council’s authorised service officer shall have the authority to vary any part of the request to Quote and shall do so in writing via the Chest.

2.1.11 Submissions must be complete in all respects, with any permitted appended supplementary material fully referenced to the relevant questions within the Request for Quotation. Variant quotations will not be accepted.

2.1.12 Bidders shall adhere to the quotation key dates as set out on the Chest.

2.1.13The Council may seek, in writing via the Chest, clarification on any part of a Bidders submission.

**2.2 Return of Quotes**

2.2.1 All quote submissions and permitted appendices shall be made via the Chest will not be permitted after the closing time has passed. Bidders must ensure that they allow sufficient time for the successful transmission of their quote before the closing date and time.

2.2.2 Advanced electronic signatures (supported by a qualified certificate as defined in Electronic Signatures Regulations 2002) are not required where quotes are submitted electronically.

2.2.3 Quotations must be submitted in Microsoft Word and Excel. Other formats are only to be submitted for supplementary information that supports this quotation.

2.2.4 The Council accepts no responsibility for any quotes received in any way other than specified. Quotations submitted in any other manner will be rejected by the Council.

2.2.5 Bidders should not include advertising information as part of their bid. Only material that is relevant.

**2.3 Contractual Arrangements**

2.3.1 The successful bidder will adhere to the Council’s contract terms and conditions and the specification.

2.3.2 Bidders should state in their submissions whether or not they consider the information supplied, if disclosed to a third party, would be prejudicial to their commercial interests, and if so their reasons for such a claim. Bidders should ensure that all such claims are made in full knowledge of the relevant terms of the Department of Constitutional Affairs Code of Practice under Section 45 of the FOI Act. This will enable Bidders to make such claims based on reasons that address the requirements of this Code.

**3. Assessment Process**

Quotations will be evaluated using the process below.

The Selection Questionnaire will be completed on the chest. In the technical section there is a pass/fail question. This is because the provisional approval from the Health Research Authority for access to the patient register is conditional on submission of evidence of the successful third party provider’s Data Security and Protection Toolkit (DSPT), the provider will need to evidence their compliance with;

* ISO 9001 : 2015 International Standard for Quality Management Systems
* ISO 20252 : 2012 International Standard for Market Research
* ISO 27001 : 2013 International Standard for Information Security Management Systems
* Data Protection Registration.

You will not be able to move forward in the process if you have not passed this section in the Technical Section of the SQ. This will be deemed a non- compliant bid.

Once the Selection Questionnaire is evaluated, if you have passed all the questions, your quotation will then be assessed using the mechanism described below.

Assessment of the quotations will be to establish the Most Economically Advantageous Tender where quality will be worth 45% of the marks and pricing 55%.

We would also like you to attend a clarification meeting on Tuesday 24th March 2020. This is where questions will be asked appertaining to your quality responses and this may alter your evaluated scores up or down. If you do not attend for this clarification meeting your bid will be deemed non-compliant.

**3.1 Quality Marking**

I n assessing the quality information the scoring described in Table 1 will be used. The individual questions will be assessed using the weightings shown in the score allocation tables for each stage.

**Table 1: Question Marking Criteria**

|  |  |
| --- | --- |
| Marking Criteria | Marks |
| Excellent response that meets the stated requirement in all respects. | 5 |
| High standard response that mostly meets the stated requirement | 4 |
| A response that adequately meets the stated requirement, | 3 |
| Reservations and concerns about the  submission | 2 |
| Poor submission with major reservations about the response. | 1 |
| Does not address or meet the requirement. | 0 |

Each assessor will mark the submissions and the overall mark will be an average of the assessors’ marks. The average mark will then be applied to the question weighting using the formula

Question weighting/Maximum available mark x average mark

A moderation of the marking will be undertaken to ensure that there are no wide variations in assessors’ marks. Where wide variations are evident the moderation manager will investigate the reasons. To ensure assessors are acting consistently and fairly.

The Quality marks will then be reweighted with the highest scoring tender being awarded the maximum quality marks and the other bids being awarded marks proportionate to their difference to the highest scoring as shown below

**3.2 Financial Assessment**

|  |  |
| --- | --- |
| Description | \*£ Agreement Price |
| Total Cost for Delivering the Survey  Please include a breakdown of your costs | £ |

Financial Assessment will be based on the sums submitted as the Contract Price and will be assessed using the CIPFA Pricing score method based on the maximum points x (100% - % above lowest price)

An illustration of how the marking and scoring is undertaken is shown in Tables 2 and 3

**Table 2 Example Bid Marking for Quality marks**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Question** | **Weighting** | **Bidder A** | | | | **Bidder B** | | | | **Bidder C** | | | | **Bidder D** | | | |
|  |  | **Assessor 1** | **Assessor 2** | **Ave mark** | **Score** | **Assessor 1** | **Assessor 2** | **Ave mark** | **Score** | **Assessor 1** | **Assessor 2** | **Ave mark** | **Score** | **Assessor 1** | **Assessor 2** | **Ave mark** | **Score** |
| **Q1** | **30%** | **5** | **4** | **4.5** | **27** | **5** | **4** | **4.5** | **27** | **5** | **5** | **5** | **30** | **2** | **3** | **2.5** | **15** |
| **Q2** | **20%** | **5** | **5** | **5** | **20** | **5** | **5** | **5** | **20** | **4** | **3** | **4.5** | **18** | **3** | **3** | **3** | **12** |
| **Q3** | **15%** | **4** | **5** | **4.5** | **13.5** | **3** | **4** | **3.5** | **10.5** | **1** | **3** | **2** | **6** | **5** | **5** | **5** | **15** |
| **Q4** | **15%** | **4** | **3** | **3.5** | **10.5** | **4** | **3** | **3.5** | **10.5** | **2** | **2** | **2** | **6** | **5** | **5** | **5** | **15** |
| **Q5** | **10%** | **4** | **5** | **4.5** | **9** | **2** | **3** | **3.5** | **7** | **2** | **3** | **2.5** | **5** | **1** | **2** | **1.5** | **3** |
| **Total** | **100%** |  |  |  | **80%** |  |  |  | **75%** |  |  |  | **65%** |  |  |  | **60%** |

**Table 3 Example Bid Scoring**

**In this example quality is 45% and Price 55%**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Bidder A** | **Bidder B** | **Bidder C** | **Bidder D** |
| **Quality Score** | 80% | 75% | 65% | 60% |
| **Calculation to apply weighting (maximum 45%)** | ((80-80)/80) x100 = 0  100 - 0 = 100  100 x 0.45 = 45 | ((80-75)/80) x100 = 6.25  100 - 6.25 = 93.75  93.75 x 0.45 = 42.1875 | ((80-65)/80) x100 = 18.75  100 – 18.75 = 81.25  81.25 x 0.45 = 36.5625 | ((80-60)/80) x100 = 25  100 – 25 = 75  75 x 0.45 = 33.75 |
| **Weighted Quality Score** | 45 | 42.1875 | 36.5625 | 33.75 |
|  |  |  |  |  |
| **Price** | £500 | £450 | £400 | £810 |
| **Calculation to apply weighting (maximum 55%)** | ((500-400)/400) x 100 = 25  100-25 = 75  75 x 0.55 =41.25 | ((450-400)/400) x 100 = 12.5  100-12.5 = 87.5  87.5 x 0.55 =48.125 | ((400-400)/400) x 100 = 0  100-0 = 100  100 x 0.55 = 55 | ((810-400)/400) x 100 = 102.5  100-102.5 = -2.5  -2.5 x 0.55 = -1.375 |
| **Weighted Price Score** | 41.25 | 48.125 | 55 | 0 |
| **TOTAL SCORE**  **Quality Score + Price Score** | 86.25 | 90.3125 | 91.5625 | 33.75  Where a minus figure is achieved the score will be readjusted to 0 |

**4. SPECIFICATION – THE SERVICE**

**4.1** **Background**

Warrington has an adult (18+) population of 165,063. The population of Warrington is quite diverse in terms of socio-economic status, and this impacts on many health and wellbeing outcomes. Warrington currently has a similar proportion of residents aged over 65 years as the average for England, but in-keeping with national trends the population is ageing. A breakdown of the adult population by age-band, gender and national deprivation quintile is provided below.

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Male | | | |  | Female | | | |
| Deprivation Quintile (IMD 2019) | 18-39 | 40-64 | 65+ | All Age |  | 18-39 | 40-64 | 65+ | All Age |
| 1 (most deprived) | 6512 | 5838 | 2217 | 14567 |  | 6473 | 5697 | 2784 | 14954 |
| 2 | 6141 | 6002 | 2412 | 14555 |  | 6388 | 5776 | 2873 | 15037 |
| 3 | 2164 | 2840 | 1658 | 6662 |  | 2148 | 2949 | 2038 | 7135 |
| 4 | 6103 | 8869 | 5125 | 20097 |  | 5488 | 8824 | 6101 | 20413 |
| 5 (least deprived) | 6846 | 12033 | 6373 | 25252 |  | 6669 | 12420 | 7302 | 26391 |
| Grand Total | 27766 | 35582 | 17785 | 81133 |  | 27166 | 35666 | 21098 | 83930 |

**4.1.2** A comprehensive Health and Wellbeing (HWB) Survey has been undertaken in Warrington in 2001, 2006 and 2013. This information has proved extremely valuable in understanding and describing health-related behaviour, identifying health inequalities (for example in relation to deprivation, age, disability) and assessing change in trends over time. A comprehensive, large scale survey of adult residents in Warrington is needed to update the information currently held from previous local lifestyle surveys. The survey needs to collect information on a wide range of topics including; perceptions of health status, emotional wellbeing, social connectedness and resilience, long-term and recent morbidity, disability, health risk behaviour, use of services, social circumstances, and neighbourhood issues.

**4.1.3**  Previous health and wellbeing surveys have used a postal data collection method for reasons of both cost effectiveness and the need to collect data from a targeted sample, stratified by age, gender and deprivation quintile using the NHS patient register. Using the patient register to obtain a stratified sample will ensure methodology is comparable with previous surveys and will enable robust analysis of responses to identify trends in lifestyle and behaviours across age groups, deprivation quintiles and genders. This will provide intelligence to identify prevalence and variations across the population and within cohorts to inform effective targeting of resources to prevent ill health and reduce health inequalities.

An application to the Health Research Authority for support to draw a stratified sample from the patient register has been provisionally approved. The provisional approval from the Health Research Authority for access to the patient register is conditional on submission of evidence of the successful third party provider’s Data Security and Protection Toolkit (DSPT), the provider will need to evidence their compliance with:

- ISO 9001 : 2015 International standard for Quality Management Systems

- ISO 20252 : 2012 International Standard for Market Research

- ISO 27001 : 2013 International Standard for Information Security Management Systems

Data protection registration

**4.2 Aim**

The aim is to derive robust, precise estimates of a range of factors known to impact

on health and wellbeing. To achieve this, the following is necessary:

**4.2.1** The Council will develop and pilot the survey tools.– Jan to March 2020.

**4.2.2** The Council will securely transfer the names and addresses of the stratified sample to the Provider. – April/May 2020.

**4.2.3** The provider will format and print the survey and accompanying participant information letter – (approx. 15 sides A4 subject to formatting) - April/May 2020.

**4.2.4** The Provider will mail out the survey and participant letter to the stratified sample – May 2020.

**4.2.5** The Provider will receive all returned surveys and ensure the responses are accurately converted into an electronic format - May to July 2020.

**4.2.6** The Provider will monitor responses and maintain weekly communication with the Council to update on response rates and review progress during whole of mail out period – May to July 2020.

**4.2.7** The Council will, dependent upon response rates, create a boost sample.

**4.2.8** The Provider will manage a second mail out and reminder process to non-responders and receive and input all returned surveys – May to July 2020.

**4.2.9** Once all data has been input, cleansed and put into an excel spreadsheet it shall be securely sent to the Council (excluding any personally identifiable information). The Provider will investigate any Council queries following validation checks – July/August 2020

**4.2.10** When the Council is satisfied with the dataset, upon specific instruction by the Council, the Provider will delete all patient identifiable information from their systems, and destroy all paper copies of the survey. The Provider will send a certificate of destruction to the Council.

**4.3 Outcomes**

The survey fieldwork will result in a rich dataset of information containing anonymised responses from participants, enabling subsequent univariate and multivariate analysis to be undertaken. The analysis will provide robust information on population health and wellbeing at a sub-Warrington level. This will:

* Inform Warrington’s Health & Wellbeing Strategy, Joint Strategic Needs Assessment and underpinning strategies for council and partner organisations.
* Assist in health needs assessment, by providing up-to-date data on morbidity and health and wellbeing status
* Assist in the commissioning and targeting of resources by highlighting areas/groups experiencing health inequalities
* Provide information for monitoring health change and the impact of local prevention and health programmes, by repeating salient aspects of previous surveys where possible and practical.