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| Local Office/Department 1st FloorBlenheim HouseDuncombe StreetLeeds LS1 4PLletterheads Jpeg template-bracket.jpg |

**Instructions to Tender**

**A delivery partner to facilitate the development of a best practice resource in communications for the health and care workforce to better support people affected by cancer**

**Reference**: DN310281

**Contract Period**

**3rd January 2018 to 31st December 2018**

 **(3 Months + 6 Months)**

***Health Education England Local Tender***

***Published By:***

Procurement and Contracts,

HEE, Blenheim House, Duncombe Street, Leeds, LS1 4PL

***November 2017***

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**Please read this entire document before completing your response.**

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**general information**

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| **GENERAL INFORMATION** |

**Background:**

The national cancer strategy: *Achieving World-Class Cancer Outcomes 2015-2020* (Independent Cancer Taskforce, 2015: <http://www.cancerresearchuk.org/sites/default/files/achieving_world-class_cancer_outcomes_-_a_strategy_for_england_2015-2020.pdf>) sets out a compelling vision for future cancer services. It includes 96 recommendations for delivery by 2020 and aims to achieve the following long term outcomes for people affected by cancer:

* Fewer people getting preventable cancers
* More people surviving for longer after a diagnosis
* More people having a positive experience of care and support
* More people having a better long-term quality of life

Within the Taskforce Strategy the importance of communication skills of the workforce was highlighted and a recommendation made stating:

**Recommendation 60: Health Education England should review the training and support currently provided to NHS staff. It should work with Medical Royal Colleges and other bodies to ensure that all new and, where appropriate, existing staff have mandatory communication skills training. This will need to include empathetic listening skills, shared decision-making, empowering patients to self-manage, and how to deliver difficult news.**

 All staff, no matter what their role or profession need to be able to communicate sensitively and compassionately with patients Health care workers are generally good at communicating. The national Cancer Patient Experience Survey (CPES) (Quality Health 2016) in relation to opportunity for communication, imparting information and ensuring understanding, highlights that when asked how they felt about the way they were told they had cancer, 84% of respondents said that it was done sensitively; and 88% of respondents said that, when they had had important questions to ask their Clinical Nurse Specialist, they had got answers they could understand all or most of the time. However, 73% of respondents said that they completely understood the explanation of what was wrong with them; and 72% of respondents said that the possible side effects of treatment(s) were definitely explained to them in a way they could understand.

**However, when things go wrong communication is often cited as the cause, Marie Curie’s ‘A long and winding road’ provides us with some of the evidence to support this.** <https://www.mariecurie.org.uk/globalassets/media/documents/policy/campaigns/the-long-and-winding-road.pdf>

**Key points**

* **a patient who receives poor communication from their GP is less likely to follow their treatment plan than one who receives clear advice. Thorough reviews from Haynes et al 38 and from Andersson et al have identified improved doctor-patient communication as critical to improved adherence to drug regimes, with consequent benefits in health outcomes.**
* **It is increasingly accepted that communication plays a significant role in many aspects of the care experience, and that poor communication can have a significantly negative influence on the patient’s psychosocial experience, symptom management, treatment decisions, and quality of life.**
* **In the absence of a comprehensive study of poor communication in the NHS, we are unable to put an overall price tag on the bill to the taxpayer. All we can say with confidence is that it is significant and that the same may be said of the adverse impact on health outcomes.**

Specific requirements of the delivery partner:

**There is a wealth of communication skills training available and it is evident that the NHS often develop the content but then others roll out the training so that we pay to access that content. We intend to address this by:**

1. **Developing a best practice resource guide which aims to spread best practice by:**
	* **identifying best practice in communication skills and bringing it together in one place**
	* **providing a resource for Cancer Alliance’s and local HEE offices to build on the good work that is already taking place**
	* **ensuring the most up to date information is available to all in an interactive guide available on-line with live links to information and resources**

**Scope of work**

**Primary phase - the scope of this work will be to:**

* **Develop a best practice resource guide in communications for health and care workforce, which will be free at the point of use by users.**
* **The resource guide is required to be developed and ready for sharing widely from 1 April 2018.**
* **The guide is expected to be a digital resource, with interactive links, able to be accessed across a range of platforms including smart devices.**
* **The resource guide is expected to both support and complement the Person Centred Care Resource currently in development and the delivery partner will therefore be expected to work with HEE and partners to achieve this.**
* **The delivery partner is expected to develop a communication and marketing plan to support the launch of the resource guide working closely with the HEE communications team.**
* **The guide should be developed in such a way that it:**
	+ **Identifies what good communication looks like, as well as the impact of poor communication. This should include the development and use of good practice case studies from the perspective of staff and patients across a range of settings. Achievement of this is expected to include identifying and utilising experts in the field of communication and training and a range of experts in cancer services, as well as those affected by cancer.**
	+ **Refers and relates to communications elements of existing healthcare competency frameworks.**
	+ **Includes the training, including e-learning, currently available (to be sourced by the delivery partner).**
	+ **Includes interactive access and links to the freely available communication skills training, including as part of the person centred care implementation resource from April 2018 (to be aligned by the delivery partner).**
	+ **links to and details the support available as part of the Making Every Contact Count workstream (to be aligned by the delivery partner).**
* **Through the course of the work the delivery partner will be required to identify opportunities and levers to support and encourage providers to potentially recommend experiential work place based annual communications training, and to share their findings and recommendations with HEE.**
* Applications should set out hosting proposals for the resource on completion.

 Phase 2 – on successful conclusion of the primary phase of this work the Cancer Programme Team will discuss with the delivery partner the completion of phase 2 which will include:

* A review and refresh of materials in December 2018 to ensure the resources are up to date

**INSTRUCTIONS TO Quote, COMMUNICATIONS & ENQUIRIES**

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| **INSTRUCTIONS TO TENDER, COMMUNICATIONS & ENQUIRIES** |

* 1. **INSTRUCTIONS TO TENDER**
		1. Tenderers are invited to submit prices for the provision of an experienced delivery partner as listed in the Pricing Schedule based on the details provided within this Invitation to Tender
		2. Tenders comprising all the documents requested **MUST** be submitted via the ‘Supplying to the NHS’ Portal, [www.supplying2nhs.org](http://www.supplying2nhs.org) no later than **Friday, 8th December 2017 at 1800 hours** using the My Response section within the Invitation to Tender. The closing time/date for receipt of tenders is clearly marked on the portal and you are recommended to upload all documents and submit your tender submission in sufficient time for it to reach the server prior to the closing time/date stated. The server automatically time/date stamps all tender submissions.
		3. Tenders received after the above date and time may not be considered.
		4. **NB:** It can take up to two working days for the ‘Due-North’ Technical Team to respond to any technical enquires. HEE will not be liable for any difficulties encountered uploading documents and the closing date and time will be strictly adhered to.
		5. Ideally, where possible, all supporting documents should be embedded into the tender document, at the relevant question/section, rather than being attached as a separate document(s). This will benefit tenderers by reducing the time to upload their submission, and it also greatly assists the Evaluation Team in identifying the response to each specific area.
		6. If Tenderers have any questions about the Invitation to Tender, such questions should be submitted to HEE using the ‘Messages’ facility within the opportunity advertised on the portal. A copy of the question and a copy of the written reply may be circulated to all tenderers, with anonymity of the tenderer preserved.
		7. Tenderers must not raise questions through any other channels, including emails direct to HEE staff or to the Procurement team. No questions will be responded to, other than those raised through the portal as described above
		8. It is critical that the documents are read carefully prior to completion. Any questions which are received after **Wednesday, 29th November 2017** may not be considered.
		9. Tenderers are advised to consider the Invitation to Tender in detail in order to satisfy themselves as to the nature and extent of HEE requirements. Tenderers are responsible for ensuring that they are fully familiar with the nature and extent of the requirements described in the Invitation to Tender for the Provision of Building Leadership for Inclusion and shall obtain for themselves at their own expense all information necessary for the preparation of their tenders
		10. Tenderers should note that notwithstanding the invitation to submit a tender HEE makes no representations regarding tenderers’ financial ability, technical competence or ability in any way to provide the Provision of Building a Digital Ready Workforce.
		11. The Invitation to Tender must be treated as private and confidential. Tenderers must not disclose the fact that they have been invited to tender or release details of the Invitation to Tender other than on an ‘in confidence’ basis to those who have a legitimate need to know or with whom Tenderers need to consult for the purpose of preparing the tender. The Invitation to Tender shall remain the property and copyright of HEE.
		12. HEE shall not be held liable for any costs, expenses and charges relating to or arising from the preparation of the tender including without limitation, the preparation of the documentation, attendance at meetings, attendance at presentations and inspection of premises
		13. The tender must be submitted strictly in accordance with the Invitation to Tender. The tender must not be conditional or be accompanied by statements that could be construed as rendering it equivocal and/or placed on a different footing from any other Tenderers. Only tenders submitted strictly in accordance with these instructions will be accepted for consideration
		14. Tenderers **MUST NOT CHANGE THE FORMAT** of the tender document and shall complete their submission without modifying the forms, questions or format of the questions. Non-compliance with this requirement may lead to rejection of the tenderer from the tender process. Any unauthorised amendment, qualification or deletion of, or addition to, the Invitation to Tender issued by HEE may invalidate the tender
		15. A tender submitted in accordance with this Invitation to Tender will be deemed to remain open for acceptance or non-acceptance by HEE for a period of **30 DAYS** from the closing date stipulated. HEE may accept the tender at any time within this prescribed period shall, however, not be bound to accept the lowest or any tender
		16. HEE does not bind itself to accept the lowest or any tender and shall be at liberty to accept or reject either in part or wholly any tender or modification of such tender and/or abort the tender process at any time prior to award. In such circumstances HEE shall not incur any liability in respect of the tender submitted and will not be obliged to commence evaluation, or continue to evaluate tender submissions or be liable for any costs incurred in connection with preparing and/or submitting and/or negotiating a tender. All such costs shall be borne by the tenderer themselves
		17. Where estimated annual/whole-life usage/service levels/volumes are indicated in the Invitation to Tender, such levels are approximate estimates of the annual/whole-life requirements of the proposed Contract. HEE does not guarantee that the usage/service levels/volumes will be restricted to/achieve the amounts stated in the Invitation to Tender. The successful tenderer will be expected to honour the actual required usage/service levels at the tendered rates
		18. HEE may, and hereby reserves the right to, alter the contents but not the intention of the Invitation to Tender prior to the closing date for tender submission. Procurement will forward these amendments, in writing, to all Tenderers. No person other than the procurement authorised service officer shall have the authority to vary any part of the Invitation to Tender who shall do so only in writing
		19. Tenderers are deemed to have fully satisfied themselves before submitting their tender as to the accuracy and sufficiency of the rate and prices stated which in the event of the tender being accepted, shall (except insofar as it is otherwise provided) cover all the obligations under the Contract including without limitation, all fees, labour, equipment, and other overhead charges, profit other costs, expenses and disbursements and all general risks, taxation duties, liabilities, obligations and liabilities set out or implied as necessary to comply with the Contract. No claim against HEE shall be allowed whether in contract or tort or under the Misrepresentation Act 1967 or otherwise on the grounds of any inconsistencies
		20. Tenders are submitted on the condition that HEE authorised service officer may, after opening the tender, discuss verbally or in writing with the Tenderer the details of the documents submitted prior to formal acceptance of a tender by way of clarification (please note that such clarification enquiry does not in any way invite negotiation), without in any way committing HEE to accept such tender
		21. Variant tenders will not be accepted
		22. Submissions must be complete in all respects, with any appended and permitted supplementary material fully referenced to the relevant question within the Invitation to Tender
		23. Submissions must be made in English, in black script.
		24. The completed tender must be signed by the tenderer and submitted in the manner and by the date and time stated, together with all supporting documents as required by the Invitation to Tender. All documents requiring a signature must be signed:
			1. Where the tenderer is an individual, by that individual;
			2. Where the tenderer is a partnership, by two (2) duly authorised partners; and
			3. Where the tenderer is a company, by either two (2) directors or a director and the

 Company Secretary such persons being duly authorised for such purpose

* + 1. The successful Tenderer will be required to execute a formal agreement prepared by HEE, which will include or refer to all relevant documents or information in the Invitation to tender as forming the Contract. No work should be undertaken in respect of the delivery of the Supplies, Service or Works procured until the formal agreement has been signed or sealed by both the successful Tenderer and HEE.
		2. HEE may request post tender clarifications.
		3. **THE FOLLOWING DOCUMENTS MUST BE COMPLETED AND RETURNED:**
			1. Responses to Statement of Requirements
			2. Responses to Method Statements
			3. Completed Company Information
			4. Completed Form of Tender
			5. Completed Schedule of Prices
		4. All requested documents must be completed and returned. HEE reserves the right to reject as ineligible any incomplete submissions or submissions which are guilty of serious misrepresentation in supplying any information requested.
		5. Tender submissions must be returned in the format requested. HEE reserves the right to disqualify a tender if it has not been submitted in the format requested.
			1. Tender Uploaded as a Completed Word Document.
			2. Completed Pre-Purchase Questionnaire Extended Form PPQ – Uploaded as a pdf or Word Document
			3. Pricing Schedules Uploaded as an Excel Spreadsheet
			4. Additional Documentation may be uploaded in the most appropriate format
		6. In the event of any conflict arising between any of the provisions of the Invitation to Tender as issued by HEE and those submitted by the Tenderer, the Invitation to Tender as issued by HEE shall take precedence

**TENDER TIMETABLE - INDICATIVE PROJECT PLAN**

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| **TENDER TIMETABLE - INDICATIVE PROJECT PLAN** |  |  |

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| Milestone | Dates 2017/2018  |
| ITT issued | 23rd November  |
| Bidder question & clarification period closes  | 23rd – 29th November  |
| ITT Submission deadline  | 8th December  |
| ITT evaluation  | 11th December  |
| Bidder Presentation (up to top 3 at HEE discretion)  | 14th December  |
| Identify Preferred Bidder  | 14th December  |
| Standstill completes (cooling period 10 calendar days) | 27th December  |
| Contract sign and mobilisation  | 2nd January 2018  |
| Start Date of Service ‘Go Live’  | 3rd January 2018  |

**CONFIDENTIALITY AND INFORMATION HANDLING**

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| **CONFIDENTIALITY AND INFORMATION HANDLING** |

* 1. **FREEDOM OF INFORMATION**
		1. Information that is supplied to Tenderers as part of the procurement exercise is supplied in good faith. However, Tenderers must satisfy themselves as to the accuracy of such information and no responsibility is accepted for any loss or damage of whatever kind or howsoever caused arising from the use by the Tenderers of such information, unless such information has been supplied fraudulently by **Health Education England**.
		2. All information supplied to Tenderers by **Health Education England** in connection with this procurement exercise shall be regarded as confidential. By submitting an offer the offeror agrees to be bound by the obligation to preserve the confidentiality of all such information.
		3. This invitation and its accompanying documents shall remain the property of **Health Education** **England** and must be returned on demand.
	2. **FREEDOM OF INFORMATION ACT 2000**
		1. The Freedom of Information Act 2000 (FOIA) applies to **Health Education England**.
		2. Tenderers should be aware of the **Health Education England** obligations and responsibilities under the FOIA to disclose, on request, recorded information held by **Health Education England**. Information provided by Tenderers in connection with this procurement exercise, or with any Contract that may be awarded as a result of this exercise, may therefore have to be disclosed by **Health Education England** in response to such a request, unless **Health Education England** decides that one of the statutory exemptions under the FOIA applies. The **Health Education England** may also include certain information in the publication scheme which it maintains under the FOIA.
		3. In certain circumstances, and in accordance with the Code of Practice issued under section 45 of the FOIA or the Environmental Information Regulations 2004, **Health Education England** may consider it appropriate to ask Tenderers for their views as to the release of any information before a decision on how to respond to a request is made. In dealing with requests for information under the FOIA, **Health Education England** must comply with a strict timetable and **Health Education England** would, therefore, expect a timely response to any such consultation within five working days.
		4. If Tenderers provide any information to **Health Education England** in connection with this procurement exercise, or with any Contract that may be awarded as a result of this exercise, which is confidential in nature and which a Tenderer wishes to be held in confidence, then Tenderers must clearly identify in their Tender documentation the information to which Tenderers consider a duty of confidentiality applies. Tenderers must give a clear indication which material is to be considered confidential and why you consider it to be so, along with the time period for which it will remain confidential in nature. The use of blanket protective markings such as “commercial in confidence” will no longer be appropriate. In addition, marking any material as “confidential” or equivalent should not be taken to mean that **Health Education England** accepts any duty of confidentiality by virtue of such marking. Please note that even where a Tenderer has indicated that information is confidential, **Health Education England** may be required to disclose it under the FOIA if a request is received.
		5. **Health Education England** cannot accept that trivial information or information which by its very nature cannot be regarded as confidential should be subject to any obligation of confidence.
		6. In certain circumstances where information has not been provided in confidence, **Health Education England** may still wish to consult with Tenderers about the application of any other exemption such as that relating to disclosure that will prejudice the commercial interests of any party.
		7. The decision as to which information will be disclosed is reserved to **Health Education England**, notwithstanding any consultation with you.

**Terms & conditioins**

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| **TERMS & CONDITIONS** |

* 1. <See the attached NHS standard Terms & Conditions 2016/17>

All tenderers **MUST** accept the T&C’s in full, as no alternatives will be considered or negotiated

**CONTRACT MANAGEMENT AND MONITORING**

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| **CONTRACT MANAGEMENT AND MONITORING** |

**NB. All costs incurred by the contractor in complying with Contract Monitoring and Management must be included as part of the rates stated in the Price Schedule.  No additional payment will be considered by HEE for complying with this activity.**

* 1. **AUTHORISED AND MONITORING OFFICER**
		1. HEE may appoint a Contract Monitoring Officer to act generally in the name of HEE for the purposes of this contract (the Authorised Officer). HEE shall give notice in writing to the Contractor of the identity of any person so appointed and of the replacement of any such person
		2. HEE may, from time to time, change their appointee as in 1.1 above, doing so in writing.
	2. **PERFORMANCE MONITORING**
		1. The Contractor’s performance and provision of the service shall be monitored by the Authorised Officer.
		2. The Contractor shall also be responsible for monitoring their own performance under this contract.
		3. Monitoring will focus on the key aspects of the contract including overall performance, quality, price, delivery and customer service.
		4. The Contractor will be required to submit management and monitoring information in a mutually agreed format to be agreed at commencement of contract.
		5. From time to time the contractor may be requested to attend specially arranged meetings.
	3. **MONITORING PROGRAMME**
		1. Prior to commencement of the contract, the successful contractor will be required to devise a service level agreement in conjunction with the Service User and Procurement to agree targets for their performance in relation to each of the key performance indicators.
	4. **COMPLAINTS IN RESPECT OF SERVICE PROVISION**
		1. The Contractor shall deal with any complaints received from whatever source in a prompt, courteous and efficient manner within **48 HOURS**. The Contractor shall keep a written record of all complaints received and of the action taken in relation to such complaints. Such records will be forwarded to the designated individual prior to the quarterly review meeting in the form of a management report for discussion at the liaison meetings.
	5. **MONITORING AND LIAISON MEETING**
		1. The Contractor shall be responsible for monitoring their performance under the Contract and provide HEE with full particulars of any aspects of their performance which fail to meet the requirements of the Contract, unless otherwise notified in writing by HEE.
		2. The Contractor shall as required by HEE representative make written submission or oral presentations of the work done under the contract in aid of any reviews or of the conduct of business at the locations.
		3. Liaison meetings between HEE and the Contractor shall be held quarterly or more frequently as required by HEE or the Contractor. HEE will make the necessary arrangements for these meetings, which will be held at premises determined by HEE. A record of all meetings shall be made by contractors and supplied to and approved by HEE.
		4. The Contractor shall arrange for the attendance of such members of their staff and those of his Subcontractors or their agents who may be required by HEE to attend as necessary.

**TENDER EVALUATION AND AWARD CRITERIA**

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| TENDER EVALUATION AND AWARD CRITERIA |

* 1. CRITERIA AND WEIGHTINGS TABLE

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| --- | --- | --- | --- |
| **Tender ID.** | **Quality Criteria** | **Low-Level Weighting** | **High-Level Weightings** |
| **Response to Company Information Questionnaire** |
| Section 1 | Company Information | For Information Only | N/A |
| Section 5 | Insurance | Pass/Fail |
| **Method Statements /Quality Questions**  |
| **5.1** | Overall understanding and quality of response  | 10%  | **60%**  |
| **5.2** | Ability to develop creative and innovative thinking  | 20%  |
| **5.3**  | Project management  | 10%  |
| **5.4**  | Ability to work collegially and collaboratively with our team, partners, academics and stakeholders who may have different backgrounds and approaches  | 10%  |
| **5.5**  | Skills and experience  | 10%  |
| **Responses to the Price Schedule/Programme of Works**  |
| See Pricing Schedule | Total Cost(s) b/f from the ‘Indicative’ Programme of Works & Fully Costed Resource Schedule | 40%  | 40%  |
| **Total** | **100%** |

### APPLYING SCORES AND WEIGHTINGS

* 1. **The highest scoring responses to each of the following ‘Quality Criteria’** *(See 7.3 quality scoring methodology* below) will be awarded 100 marks, with all other tenders scored proportionate to that, i.e. a tender response that receives 60% less than the highest score will be awarded 60% less marks after which the above weightings will be applied.
	2. **Response to Statement of Requirements**

Overall quality of the supplier’s response – clarity, brevity, content, evidence

Ability to develop creative thinking

Project management

Ability to work collegially and collaboratively with our team, partners, academics and stakeholders who may have different background and approach

Timescales, development, design and testing

* 1. QUALITY SCORING METHODOLOGY

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| **Response** | **Score** |
| Tenderer fails to provide a response or the response is of such a poor standard, question not answered, or omitted, or response is unsatisfactory to provide no confidence that the Tenderer can meet the standards required. Evidence is unacceptable or non-existent. Does not meet the minimum requirements. IS UNACCEPTABLE  | 0 |
| Poor response, which only partially answers requirement with major deficiencies or concerns in certain areas with lack of detail or relevant evidence. Little relevant data included. Does not meet minimum requirements. **IS WELL BELOW EXPECTATIONS.** | 2 |
| Tenderer provides a response that partially satisfies requirement with useful evidence provided, but response falls short of minimum expectations and is of a low standard, with minor deficiencies or concerns in the information provided. Provides a low level of confidence that the Tenderer can meet the standards required. Does not meet minimum requirements.**IS BELOW EXPECTATIONS.** | 4 |
| Tenderer provides a response that is acceptable and meets minimum criteria, but remains basic and could have been expanded upon. The response is of a low to mid standard that provides a low to mid level of confidence that the Tenderer can meet the standards required **MEETS EXPECTATIONS.** | 6 |
| Tenderer provides a response that is comprehensive, is of a mid to high standard that satisfies requirement and exceeds minimum expectations, including extra levels of detail. Provides a mid-level of confidence that the Tenderer can meet the standards required. **ABOVE EXPECTATIONS.** | 8 |
| Tenderer provides an excellent response that is a comprehensive and useful response of a high standard which exceeds expectations including a full description of techniques and measurements employed, where appropriate, that provides a high level of confidence that the Tenderer can meet the standards required. **IS EXCEPTIONAL**  | 10 |

* + 1. If applicants’ responses to any of the requirements are left blank (e.g. no written response) then the question(s) concerned will be scored “0” and the tender will not be scored any further.
		2. If applicants’ fail to score a **MINIMUM OF 6** for any of the ‘Quality Criteria’ their tender submission will not be evaluated any further
	1. **PRICE EVALUATION METHODOLOGY**
		1. Responses to each of the ‘Price Criteria’ as outlined in the above ‘Criteria and Weightings Table’ will be scored using the following Methodology

The lowest Total bid submitted will be awarded the full 40 marks and all other bids will be scored Proportionate to that, i.e. a bid received that is 10% higher than the lowest bid, will receive 10% less marks.

* 1. **PRESENTATIONS AND CLARIFICATION SESSIONS**
		1. Following tender evaluation HEE intends to invite the TOP 3 SCORING BIDDERS to a presentation and clarification session. Full details will be published to the top scoring companies following the tender evaluation
		2. This will not be scored separately but will be used to clarify and verify information submitted with the tender. It is possible therefore that scores may go up or down depending on the outcome of this session.

Please Note:

HEE reserves the right to award the contract based on evaluation of the initial tenders, without the need to conduct any presentation/clarification sessions

* 1. TIED SCORES
		1. In the event of a tie with more than one company achieving the same highest score, the contract will be award to the company offering the lowest *‘Total Cost(s)’*
	2. **EVALUATION PANEL**
		1. All Tenders will be evaluated by a selected panel of technical and business users.
		2. The evaluation panel will individually score responses to the Quality Criteria outlined at 6.2 above - after which, the panel will come together to moderate and agree a single score for each of the Quality Criteria.
		3. Prior to awarding the contract, HEE may choose to conduct a brief period of ‘Due Diligences’ once a preferred supplier has been identified.

**Company Information Questionnaire Schedule:**

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| Company Information questionnaire |

#### Supplier information *(Not Scored, For Information Only)*

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| Question |
|  | Full name of the Supplier completing the Company information  |
|  |
|  | Registered company address |
|  |
|  | Registered company number |
|  |
|  | Registered charity number |
|  |
|  | Registered VAT number |
|  |
|  | Name of immediate parent company |
|  |
|  | Name of ultimate parent company |
|  |
|  | Please mark ‘X’ in the relevant box to indicate your trading status |
| * + - 1. a public limited company
 |  □ Yes |
| * + - 1. a limited company
 |  □ Yes |
| * + - 1. a limited liability partnership
 | □ Yes |
| * + - 1. other partnership
 | □ Yes |
| * + - 1. sole trader
 | □ Yes |
| * + - 1. other (please specify)
 | □ Yes |
|  | Please mark ‘X’ in the relevant boxes to indicate whether any of the following classifications apply to you |
| * + - 1. Voluntary, Community and Social Enterprise (VCSE)
 | □ Yes |
| * + - 1. Small or Medium Enterprise (SME) [[1]](#footnote-1)
 | □ Yes |
| * + - 1. Sheltered workshop
 | □ Yes |
| * + - 1. Public service mutual
 | □ Yes |

####

#### Bidding Model *(Not Scored, For Information Only)*

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| Question |
|  | **Please mark ‘X’ in the relevant box to indicate whether you are;** |
| * + - 1. Bidding as a Prime Contractor and will deliver 100% of the key contract deliverables yourself
 | □ Yes |
| * + - 1. Bidding as a Prime Contractor and will use third parties to deliver some of the services

If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. | □ Yes |
| * + - 1. Bidding as Prime Contractor but will operate as a Managing Agent and will use third parties to deliver all of the services

If yes, please provide details of your proposed bidding model that includes members of the supply chain, the percentage of work being delivered by each sub-contractor and the key contract deliverables each sub-contractor will be responsible for. | □ Yes |
| * + - 1. Bidding as a consortium but not proposing to create a new legal entity.

If yes, please include details of your consortium in the next column and use a separate Appendix to explain the alternative arrangements i.e. why a new legal entity is not being created. Please note that the Authority may require the consortium to assume a specific legal form if awarded the contract, to the extent that it is necessary for the satisfactory performance of the contract. | □ Yes**Consortium members****Lead member** |
| Bidding as a consortium and intend to create a Special Purpose Vehicle (SPV). If yes, please include details of your consortium, current lead member and intended SPV in the next column and provide full details of the biding model using a separate Appendix. |  □ Yes**Consortium members****Current lead member****Name of Special Purpose Vehicle** |

#### Contact Details *(Not Scored, For Information Only)*

|  |
| --- |
| Supplier contact details for enquiries about this PQQ |
|  | * + - 1. Name
 |  |
| * + - 1. Postal address

 |  |
| * + - 1. Country
 |  |
| * + - 1. Phone
 |  |
| * + - 1. Mobile
 |  |
| * + - 1. E-mail
 |  |

#### 4.4.2 Licensing and registration *(Not Scored, For Information Only)*

|  |
| --- |
| Qualification and accreditation within your field/industry  |
| Licensing and registration (please mark ‘X’ in the relevant box)  |
|  | * + - 1. Registration with a professional body

If applicable, is your business registered with the appropriate trade or professional register(s) in the EU member state where it is established (as set out in Annex XI of directive 2014/24/EU) under the conditions laid down by that member state). | □ Yes□ NoIf Yes, please provide the registration number in this box. |
| * + - 1. Is it a legal requirement in the state where you are established for you to be licensed or a member of a relevant organisation in order to provide the requirement in this procurement?
 | □ Yes□ NoIf Yes, please provide additional details within this box of what is required and confirmation that you have complied with this. |

#### 4.4.3 – Technical and professional ability *(Pass/Fail)*

|  |
| --- |
| Relevant Experience and Contract Examples |
| Please provide details of up to three contracts, in any combination from either the public or private sector, that are relevant to the Authority’s requirement. Contracts for supplies or services should have been performed during the past three years. Works contracts may be from the past five years, and VCSEs may include samples of grant funded work. The named customer contact provided should be prepared to provide written evidence to the Authority to confirm the accuracy of the information provided below.Consortia bids should provide relevant examples of where the consortium has delivered similar requirements; if this is not possible (e.g. the consortium is newly formed or a Special Purpose Vehicle will be created for this contract) then three separate examples should be provided between the principal member(s) of the proposed consortium or Special Purpose Vehicle (three examples are not required from each member). Where the Supplier is a Special Purpose Vehicle, or a managing agent not intending to be the main provider of the supplies or services, the information requested should be provided in respect of the principal intended provider(s) or sub-contractor(s) who will deliver the supplies and services. |
|  | Contract 1 | Contract 2 | Contract 3 |
|  | Name of customer organisation |  |  |  |
|  | Point of contact in customer organisationPosition in the organisationE-mail address |  |  |  |
|  | Contract start dateContract completion dateEstimated Contract Value |  |  |  |
|  | In no more than 500 words, please provide a brief description of the contract delivered including evidence as to your technical capability in this market. |  |  |  |
| * 1. If you cannot provide at least one example for questions 9.1 to 9.4, in no more than 500 words please provide an explanation for this e.g. your organisation is a new start-up.
 |
|  |

####  Declaration

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| I / We declare that to the best of my knowledge the answers submitted to these questions are correct. I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement, and I am signing on behalf of......................... (**Insert name of supplier**). I / We understand that the Authority may reject my submission if there is a failure to answer all relevant questions fully or if I provide false/misleading information. I have provided a full list of any Appendices used to provide additional information in response to questions.I / We agree to enter into a Data Sharing Agreement (DSA), if required, if we progress to be the successful tenderer.I / We also declare that there is no conflict of interest in relation to Health Education England requirement.The following appendices form part of our submission;

|  |  |
| --- | --- |
| **Section of Company Questionnaire** | **Appendix number** |
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*Electronic submission instructions: As this document is being submitted electronically by upload via the Questionnaire within* [www.supplying2nhs.org](http://www.supplying2nhs.org) *the name of the Director or other senior representative should be typed in the signature block and will be accepted as their authorised signature in submitting this Questionnaire.* |
| **PQQ Completed By:** |
| 1.1 | Name: |  |
| 1.2 | Roll in Organisation: |  |
| 1.3 | Date: |  |
| 1.4 | Signature: |  |
| 1.5 | Tel: |  |
| 1.6 | E-mail: |  |

#### Before Returning This Questionnaire Please Ensure That You Have:

Answered all questions appropriate to your application;

Included all relevant documents ensuring that all inclusions are clearly marked in the appendices table above

 Completed and signed the above declaration.

#### Company Information Questionnaire – Template for Appendices

|  |
| --- |
| **Appendix Number -** |
| **Company Information Questionnaire section -** |
| **Question number -** |
|  |

1. See EU definition of SME: http://ec.europa.eu/enterprise/policies/sme/facts-figures-analysis/sme-definition/ [↑](#footnote-ref-1)