

INVITATION TO TENDER

Health Trainer Service

TABLE OF CONTENTS

Page

1	DEFINITIONS	2
2	INTRODUCTION	2
2.1	PURPOSE OF THIS DOCUMENT.....	2
2.2	CONTENT OF THIS DOCUMENT.....	3
3	THE PROPOSAL PROCESS	4
3.1	OUTLINE TIMETABLE.....	4
3.1	RECEIPT, CONFIRMATION AND NOTIFICATION OF AUTHORISED REPRESENTATIVE.....	ERROR!
	BOOKMARK NOT DEFINED.	
3.2	PROVISION OF INFORMATION.....	5
3.3	CHANGES TO THE PROPOSAL PROCESS.....	5
3.4	CONTRACT AWARD.....	5
4	COMMUNICATION DURING PROPOSAL PREPARATION AND PROPOSAL EVALUATION STAGES	6
4.1	PROPOSAL PREPARATION STAGE.....	6
5	SUBMISSION INSTRUCTIONS	7
5.1	ITT RESPONSE STRUCTURE, FILE NAMING DISCIPLINE AND CROSS-REFERENCING.....	7
5.2	PROCESS FOR SUBMISSIONS IN RESPONSE TO THE ITT.....	7
6	PROPOSAL CONDITIONS	8
6.1	ROLE OF PCT.....	8
6.2	PROPOSAL SUBMISSION.....	8
6.3	POTENTIAL PROVIDER CHANGES.....	8
6.4	CONFLICTS.....	8
6.5	FREEDOM OF INFORMATION.....	8
6.6	COSTS AND EXPENSES.....	9
6.7	DISCLAIMER.....	9
7	PROPOSAL EVALUATION	10
7.1	ITT.....	10
7.2	VALUE FOR MONEY.....	10
7.3	EVALUATION.....	10

1 DEFINITIONS

1.1 In this Invitation To Tender (ITT) the following expressions shall have the following meanings:

- | | | |
|-----|---------------------------|--|
| (a) | The PCT | Hammersmith and Fulham Primary Care Trust (HFPCT, the PCT) |
| (b) | Potential Provider | The individual or organisation submitting the tender |
| (c) | Authorised Representative | An individual appointed to act on behalf of the potential provider |
| (d) | Proposal | The document submitted by Potential providers to the the HFPCT in response to the ITT. |

2 INTRODUCTION

2.1 Purpose of this Document

- (a) This document has been issued to all Potential Providers and is to be read in its entirety, including the service specification/s attached.
- (b) This document also contains important information concerning the procurement process and conduct of Potential Providers and their advisors. Particular attention is drawn to the provisions of this Invitation to Tender relating to:
 - (i) Contact with the PCT or other NHS Organisations, confidentiality, canvassing and non-collusion. Potential Providers should further note the requirement to advise the PCT prior to Proposal submission of any changes to the Potential Provider's organisation or consortium or any relevant organisation; and
 - (ii) Freedom of information.
- (c) Failure to comply with any of these provisions may lead to exclusion from further participation in the process.

2.2 Content of this Document

(d) This Invitation to Tender (ITT) consists of the following:

Volume	Description
Main Document	Instructions to Potential Providers
Appendix A	Service Specification
Appendix B	PCT standard contractual terms (this document will form the Head Agreement for any contract awarded as a result of this ITT)
Appendix C	Pre-qualification questionnaire (this document must be used by potential providers to make their submission)

(e) This ITT:

- (i) Sets out the instructions for submitting a Proposal;
- (ii) Sets out the evaluation approach which will be applied to each Proposal to assist the PCT in selecting a Provider; and
- (iii) Outlines the timeframe within which the selection process is expected to take place.

3 THE PROPOSAL PROCESS

3.1 Outline Timetable

- (f) The proposal process and outline timetable covering the period following the release of the Invitation to Tender (ITT) to the date by which the programme/service should commence is shown below. Further explanation of the process is set out in Section 3.

Planned procurement timeline to availability of framework

Stage	Description	Due/End Date
Issue of ITT	The date on which the PCT publishes ITT documentation to potential providers	10 th September 2007
ITT Clarification Period	The date by which each potential provider must contact the PCT to request clarification of any issues related to the preparation of ITT Part C responses	12 th October 2007
ITT Response Date	The date by which Proposals from Potential providers must be received by the PCT	12 noon, 19 th October 2007
ITT Proposal evaluation period	The period during which the final ITT Proposals are assessed by the PCT	22 nd October 2 nd November 2007
Contract award	The date on which a Provider is selected and an agreement is signed	9 th November 2007
Target Commencement Date	The date from which the service/programme will commence	1 January 2008

3.1 Organisation details

- 3.1.1 Potential providers are required to confirm to the PCT within their tender proposal, receipt of this ITT, acceptance of its terms, the identity and contact details of their Authorised Representative who is to act as their principal contact in respect of this procurement. Potential providers are also requested to appoint a reserve Authorised Representative, who, together with the Authorised Representative is empowered to represent the potential provider and negotiate on his behalf. Please include this information in the pre-qualification questionnaire (Appendix C)

3.2 Provision of Information

- 3.2.1 It is the Potential Provider's responsibility to notify the PCT of any change to the Authorised Representative(s) identity or contact details. Any information additional to this ITT will be sent to each potential provider's Authorised Representative. The PCT will consider all information sent to the Authorised Representative to have been duly received by the relevant Potential Provider.
- 3.2.2 The Potential Provider and its relevant organisations are responsible for obtaining all information and independent advice that it considers necessary for the preparation of its Proposal.
- 3.2.3 The PCT is committed to running a fair and competitive procurement process throughout which all information issued by the PCT is made available to all Proposals.

3.3 Changes to the Proposal Process

- 3.3.1 The PCT may:
- (i) Amend the outline timetable for any stage of the ITT process;
 - (ii) Vary any aspect of the ITT process and/or introduce additional steps or stages into the ITT process; and
 - (iii) Vary any aspects of its requirements.
- 3.3.2 The PCT will notify each Potential Provider's Authorised Representative of any changes made to the ITT process and outline timetable.
- 3.3.3 Under no circumstances will the PCT, any Health Service Body or any advisers be liable for any costs, claims or expenses incurred by Potential Providers, relevant organisations or their Authorised Representatives as a result, directly or indirectly, of any such changes to the ITT process or the outline timetable or otherwise.

3.4 Contract Award

- 3.4.1 The PCT may decide not to award any contract following this ITT at any time during the procurement process at its sole discretion

4 COMMUNICATION DURING PROPOSAL PREPARATION AND PROPOSAL EVALUATION STAGES

4.1 Proposal Preparation Stage

4.1.1 All requests by Potential Providers for clarification of this ITT must be sent to the following contact:

Name:	Paula Dunne
E-Mail Address:	Paula.Dunne@hf-pct.nhs.uk
Phone Number:	020 8846 7785

- (i) The PCT will endeavour to respond to each clarification request received within the Clarification Period within 3 Business Days.
- (ii) The PCT does not commit to respond to any clarification request received after the expiry of the Clarification Period.

4.1.2 Where any response to a request for clarification or the PCT's response thereto contains information which should, in the interests of a fair procurement process, be disseminated to all Potential Providers, the PCT shall be free to disseminate such information to all Potential Providers. Before doing so the PCT will inform the Potential Provider who first made the request of its intention to do so and offer the provider the opportunity to withdraw the request for clarification before such dissemination.

5 SUBMISSION INSTRUCTIONS

5.1 ITT Response Structure, File Naming Discipline and Cross-referencing

5.1.1 Potential Providers must supply any additional information, as required, as accurately and concisely as possible. Proposals may include additional information as part of their response in the form of supplementary files.

5.2 Process for Submissions in response to the ITT

5.2.1 All responses must be sent, using the pre-qualification questionnaire (appendix C), to:

Name:	Mike Wood
E-Mail Address:	Mike.Wood@hf-pct.nhs.uk
Address:	Chief Executive, Hammersmith and Fulham Primary Care Trust, 5-7 Parsons Green, London SW6 4UL

5.2.2 Responses must be delivered to the PCT no later than the ITT Response Date, and may be submitted in hard copy or by email.

6 PROPOSAL CONDITIONS

6.1 Role of PCT

- 6.1.1 The PCT is responsible for the management, negotiation and mobilisation of the agreement. Potential Providers should note that where this ITT gives any discretion to the PCT, the Potential Provider shall not be entitled to dispute the exercise of the PCT's discretion.

6.2 Proposal Submission

- 6.2.1 All documentation and communication related to this procurement must be in English.
- 6.2.2 The PCT reserves the right not to proceed with any Proposals that are not compliant with the conditions set out in this ITT, in which case the Proposal may be ruled ineligible.

6.3 Potential Provider Changes

- 6.3.1 Each Potential Provider is subject to an ongoing obligation throughout the agreement term to notify the PCT of any material changes in its circumstances. This includes (but is not limited to) changes to the identity of Relevant Organisations or the ownership or standing thereof and significant reductions in financial or operating capacity. The PCT should be notified of any material changes as soon as they become apparent.

6.4 Conflicts

- 6.4.1 Potential Providers and any Relevant Organisations are reminded of their continuing obligation to disclose actual, potential and perceived Conflicts of Interest.

6.5 Freedom of Information

- 6.5.1 Potential Providers must clearly identify any information supplied in response to this ITT which they consider to be confidential or commercially sensitive and attach a brief statement of reasons, setting out what harm may result from disclosure and the time period applicable to the sensitivity.
- 6.5.2 Proposals should also note that the receipt by the PCT of any information marked "confidential" or equivalent does not mean that the PCT accepts any duty of confidence by virtue of that marking, and that the PCT has the final decision regarding the disclosure of any such information in response to a Request for Information.

6.6 Costs and Expenses

- 6.6.1 All Potential Providers and Relevant Organisations are responsible for all costs incurred by them in connection with their responses to this ITT and all future stages of this procurement. The PCT will not be responsible for any Potential Provider's or the Relevant Organisations' costs or expenses howsoever incurred.

6.7 Disclaimer

- 6.7.1 The PCT reserves the right to change the basis of, or the procedures (including the outline timetable) relating to, the procurement process; to reject any or all of the responses or Proposals; not to invite a Potential Provider to proceed further; not to furnish a Potential Provider with additional information nor otherwise to continue with a Potential Provider in respect of this procurement.
- 6.7.2 The PCT shall not be obliged to appoint any of the Potential Providers to this procurement and reserves the right not to proceed with the award process (or any other procurement process) and to withdraw from the discussions, or any part thereof, at any time.
- 6.7.3 Nothing in this ITT or any other pre-contractual documentation shall constitute the basis of a contract that may be concluded in relation to the procurement, nor shall such documentation/information be used in construing any such contract. No such contract will contain any representation or warranty in respect of the ITT or other pre-contract documentation.

7 PROPOSAL EVALUATION

7.1 ITT

- 7.1.1 The PCT intends to evaluate Proposals in accordance with the criteria and weightings given below.
- 7.1.2 However, the PCT reserves the right to amend the criteria and/or their weightings in respect of the evaluation of this ITT.

7.2 Value for Money

- 7.2.1 In evaluating the Proposals, the PCTs overall basis for evaluation is to select the most economically advantageous tenders from the point of view of the PCT.
- 7.2.2 The PCT is following the Office of Government Commerce's (OGC) guide to good practice in the evaluation of complex tenders. The guidance defines value for money (the basis for the most economically advantageous tender) as the optimum combination of quality (or fitness for purpose) and whole-life cost to meet the users' requirement. This is stated as rarely being synonymous with the lowest price.

7.3 Evaluation

- 7.3.1 The ITT will be considered based on how it meets the Service Specification/s and the goals and strategies of the PCT.
- 7.3.2 Following completion of the ITT evaluation, the PCT intends to appoint Provider/s that in the judgment of the PCT are most likely to offer best value for money and service delivery in meeting the PCT requirements.
- 7.3.3 The criteria that the PCT has established for identifying the most economically advantageous tenders are set out below.
- 7.3.4 The PCT has also set out below relative weightings for each of the criteria.
- 7.3.5 The evaluation criteria matrix and their relative weighting bands are as follows:

Description of Criteria	Weighting
The evaluating factors shall include the Potential Provider's: <ul style="list-style-type: none">- ability to meet all requirements of the service specification and present innovative solutions to those requirements- technical merit of the proposed solution- cultural fit with the PCT and commitment to knowledge transfer- ability to meet local service requirements and flexibility to handle local services particularities- previous experience	40%

Description of Criteria	Weighting
<ul style="list-style-type: none"> - approach to handover and transition 	
<p>Evaluating factors include the Potential Provider's:</p> <ul style="list-style-type: none"> - ability to comply with performance and contract management requirements, including Proposal's approach to evaluation of service delivery success - ability to demonstrate compliance with the goals of the PCT. - response to the service specification 	60%