



Public Health
Agency

Improving Your Health and Wellbeing

Public Health Agency

Social Care Procurement Awareness Session November 2013

Introductions

PHA

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Purpose of Awareness Sessions

- ❑ To provide all organisations, who may be interested in applying for future PHA tender opportunities linked to social care, with an outline of how the process will be managed by the PHA.
- ❑ The awareness session **will not** be able to address any issues linked to existing contracts that are in place or any plans regarding how future services may be tendered.
- ❑ It will only be possible to answer questions that are directly linked to how the procurement process will operate.

Outline of Session

- ❑ Overview of legislation & policy applying to HSC organisations
- ❑ PHA procurement priorities and indicative timescales
- ❑ Procurement process and documentation (tender pack)
- ❑ Overview of financial information required
- ❑ Important things to remember when completing tender documentation
- ❑ Additional support available

Legislation

TFEU Principles and Freedoms

Principles

- ☐ Transparency
- ☐ Equal Treatment / Non Discrimination
- ☐ Mutual Recognition
- ☐ Proportionality

Freedoms

- ☐ Freedom of movement of People, Goods and Services
- ☐ Freedom of Establishment

Legislation

- ❑ EU Public Contracts Directive 2004
- ❑ Transposed into UK Law - Public Contracts Regulations 2006 for England, Wales and Northern Ireland
- ❑ Public Contracts (Amendment) Regulations 2009
- ❑ Public Procurement (Miscellaneous Amendments) Regulations 2011

NI Public Procurement Policy

- ❑ Developed 2002 (v8 revised October 2012)
- ❑ Establishment of NI Procurement Board
- ❑ Centres of Procurement Expertise (CoPEs)
- ❑ Definition of “Public Procurement”
 - “the process of the acquisition, usually by means of a contractual arrangement after public competition, of goods, services, works and other supplies by public services”
- ❑ Definition of “Best VFM”
 - “the most advantageous combination of cost, quality and sustainability to meet customer requirements” (Adopted into all HSC Organisations SFI’s)
- ❑ Link to CPD Website: CPD Public Procurement Policy

Why is PHA Introducing a new process now ?

- ❑ Obligation under Procurement Directives & Internal Audit Reports to introduce Competitive Tendering
- ❑ Increased level of public procurement scrutiny
- ❑ Need to move from “Funding Services” to “Buying Services” through open tendering competitions.
- ❑ Delivering Best Value – in terms of cost and quality
- ❑ Delivering standard service/uniformity across the region where required
- ❑ Opening competition and benchmarking across areas
- ❑ Improved contract management & sustaining service standards

PHA Procurement Priorities

Programme Area	Indicative Timescale
Drugs and Alcohol (3 phases)	Dec 2013 - Oct 2014
Mental Health and Suicide Prevention (3 phases)	Dec 2013 - June 2015
Relationship and Sexuality Education services	Dec 2013 – March 2014
Other Sexual Health services	Sept 2014 – August 2015
Tackling Poverty	April 2015 – March 2016
One Stop Shops	Sept 2015 – June 2016
Obesity	Oct 2015 – March 2017
Healthy Living Centres	July 2015 – June 2016
Community Infrastructure	Oct 2016 – Sept 2017

Outline of New tender Award Process for PHA

This is Not All New !

Similarities to previous funding processes

- Use of a Service Specification
- Competitive process
- Use of a panel for adjudication
- Pre- determined Criteria for award
- Scoring Mechanisms explained in detail to bidders and panels
- PHA terms and conditions of funding
- Contract Management

Advertisement

All Tender opportunities will be advertised on the PHA website and the press

Advertisement will provide details of:

- ❑ Title of the service
- ❑ How to access tender documents
- ❑ Closing date and time

Important to note:

- ❑ Open to all potential providers
- ❑ **Existing providers will not be contacted directly**

Tender Process

■ **Contract Adjudication Group (CAG)**

- Group of service professionals with appropriate knowledge tasked to select the right service from those tendered
- Minimum of 3 representatives
- Independent from any of the Tenderers
- Agree the tender documents
- Score and award the tender returns

■ **Service Specification**

- Description of the service to be procured
- State the requirements clearly, concisely, logically and unambiguously
- Use of best available evidence

Tender Documents

- Instructions for tendering – read these carefully.
- Service Specification
- Tender Response
- Tender Evaluation Methodology and Marking Scheme (TEMMS)
- Terms and Conditions
- Form of Tender
- Certificates

Evaluation Process

- ❑ How tenders will be evaluated will be stated clearly in the tender documentation
- ❑ Outcome will be based on an overall assessment of the quality and price of the tenders received

Evaluation Process

3 Question areas:

- ❑ **(1) General Questions** – for information only
- ❑ **(2) Selection Questions** – Pass / Fail -Mandated Legal, Financial, Past experience
- ❑ **(3) Award Questions** – linked to subject matter of the service and looking to the future. Each question will have an allocated % weighting / score – explained in the TEMMS
 - Award questions will be scored – details will be provided in the TEMMS

Evaluation Process

- ❑ Assessment of price
- ❑ Tenders will be awarded based on the Most Economically Advantageous Tender not on lowest price.
- ❑ % split applied between quality and price

Financial Information

- ❑ Specific to particular Service / Tender
- ❑ Looking at price of the service (not cost of running the organisation)
- ❑ Likely to ask for:
 - Price per hour
 - Price per session
 - Price per day
- ❑ Lowest price will receive full marks available, others will receive a percentage score against that.

**Explained in Tender Evaluation Methodology and Marking Scheme
(TEMMS)**

Joint / Consortia Bids

- ❑ PHA will welcome joint or consortia tender applications...however.....
- ❑ Please note that all organisations party to the application must complete the selection questions
- ❑ All information requirements will be set out in the Instructions for Tender



Timeframe

- ❑ It is likely to take between 3 – 6 months from tender is advertised until a contract is awarded

Dealing with Queries /Questions

- ❑ During the tender process any queries must be sent to the following email address : phatender.queries@hscni.net
- ❑ All queries must have the tender name and number on it
- ❑ Transparency – anonymised questions and answers will be made available to all bidders on the PHA Website

How to Submit Tender Bid

- ❑ Full instructions will be included in the tender documentation
- ❑ Return all tender documentation to the stated email address
- ❑ Remember to comply with closing date and time
- ❑ Remember to include all requested information
- ❑ Once tenders have been submitted the CAG will evaluate and score each tender against the stated criteria

Important things to remember

- ❑ Ensure you have downloaded all documents
- ❑ Read all instructions in full
- ❑ Follow instructions – word limits, restrictions around brochures, web links, attachments
- ❑ Allow enough time to complete your tender return
- ❑ Complete **ALL** questions
- ❑ Aim to give clear, concise answers
- ❑ The CAG can only consider the information provided in the tender return and cannot take prior knowledge into consideration

Important things to remember

- ❑ Ensure you comply with closing date and time
- ❑ Do not leave it until last minute. Leave time to ensure documents can be uploaded
- ❑ The tender documents will not be opened or accessed until after the closing date and time
- ❑ Ensure you have uploaded all requested information including attachments where relevant e.g. Certificates
- ❑ Consider Consortium / Sub Contracting opportunities

Notification

If Tenderers are deselected they will be notified in writing at the time and given reasons why.

At the end of the process, all Tenderers are notified and there may be:

- ❑ Standstill Period – Intention to award
- ❑ Award / Regret Letters



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Further Support and Assistance Available

Invest NI (<http://www.investni.com/index>)

Offers a range of information guides and procurement training opportunities including:

- Successful Tendering Guide:
 - The Tender Process;
 - Preparation and Understanding the Market;
 - Top Tips for Successful Tendering.
- Training Workshops:
 - Introduction tendering
 - Advancing tendering

Inter Trade Ireland (www.intertradeireland.com/unlock)

- ❑ Offers a range of Public Procurement services with particular
- ❑ emphasis on cross-border trade including:
 - Meet the Buyer events
 - Go 2 Tender Training Workshops
 - Tender Hints and Tips (includes a Procurement jargon buster and various presentations)
 - Consortia Facilitation

Central Procurement Directorate

(www.dfpni.gov.uk/index/procurement-2/cpd/cpd-suppliers.htm)

Guidance for those seeking to undertake procurement opportunities with NI public sector including:

- PGN 02/12: Public Procurement A Guide for Small and Medium Sized Enterprises (SMES).
- PGN 01/11: Public Procurement A Guide for Social Economy Enterprises.

Local Councils

- ❑ Offer sessions in respect of procurement awareness and
- ❑ skills development. For example:
 - **Belfast City Council** (<http://www.belfastcentre.com/belfast-city-council-procurement-workshops>)
 - Introduction to Procurement with Belfast City Council
 - Consortia Building

Tradesocial.net (www.tradesocial.net)

- ❑ Aims to promote opportunities for social enterprises to do more
- ❑ business including selling to the public sector.
- ❑ Provides tendering guidance information and support for social
- ❑ enterprises from a range of public and community and voluntary organisations.

Question and Answer Session

Please note that all questions and answers will be noted and a written record placed on the PHA Website

Any further enquiries or points for clarification can be sought by contacting:

phatender.queries@hscni.net

Queries arising from the information sessions should be submitted no later than the 10th Dec. A formal response to issues raised will be provided by 17th Dec and published on the PHA website.