

Note – draft guidance on:

What happens before the procurement process begins?

- 3-6 months before a steering group is established
- Members of the steering group will
 - Look at the current service and it's outcomes
 - Consider what the future service should provide
 - Receive permission from the CCG Governing Body to start a procurement process
 - Hold a Prior information notice event to inform potential bidders that a procurement is about to start giving an overview of the service to be commissioned and how the tender process will run.

PQQ- pre qualification Questionnaire

This is a technical review of the organisation planning to bid for the service taking into the financial standing and appropriate registration of the potential bidder. This is performed either before the ITT documents are issued or at the same time as the ITT documents are issued depending on the number of potential bidders.

ITT- Invitation to Tender

This is a detailed response from the bidders to a series of questions posed by the CCG. These will usually cover how the service will be provided, the resources available to mobilise and deliver the service, how the bidder would demonstrate a high quality service is being provided and a price for the service

What happens during the procurement process?

- The executive committee will be updated on progress
- When the bids are in:
 - Meet weekly
 - Spend several days reading the bid depending on the number and the length of each bid
 - Comment on specific aspects of the bid
 - Scoring the bids

How to assess tenders and score a bid?

You will be provided with scoring guidance, a scoring sheet to complete and if you wish, access to a room at the CCG where you can sit quietly to reread and score the bids

What happens on bidders day?

All bidders are invited to attend a meeting, which like the PIN meeting covers the assessment process, advice on completing the bid documents, essential information to include and how to submit the bid documents.

What happens at presentation, site visit and final interview, moderation meetings?

The bidders have the opportunity to present to the CCG details of their bid. This is a set format and the evaluators can ask questions at the end about the presentation. The CCG tends to record the event so that both parties can review and have a record of the event.

The site visit is usually to an existing service provided by the bidder. Where possible this is in London but it could be outside of London in which case it would mean an early start or overnight trip. The CCG arranges transport for all the evaluators. The evaluators would have an outline list of questions

and a scoring sheet to record their views and impressions of the service. These scores feed into the final marks for the bids.

There is a final interview where the evaluators ask the bidders a series of questions. This is usually the same questions for all bidders. As with the other aspects of the evaluation process the evaluators take notes and score the bidders. This is also usually recorded.

Once all these events are complete the evaluators submit all their scores to the moderator. They are recorded on a spreadsheet and presented to the evaluators. Where there is a large discrepancy of scores e.g. one evaluator scores a question 1 and another gives 3 or 4 out of 4 a discussion takes place about what has influenced the score. The evaluators all agree their final score for each question and an overall score is calculated.

Each question is scored on a scale of 0 to 4 and the questions are weighted so the most important questions have a higher influence on the final score.

Awarding the contract:

- Need agreement and approval from the investment committee/Finance and performance Committee – which
 - Oversees the finance scrutiny and evaluation of the bids
 - Will assess if the service offers value for money
 - Advise on any conflict of interest
- Final decision is made by the governing body

Once a contract has been awarded, there is a 10 day standstill period to allow for any challenges to the decisions and process

– Mobilisation Phase commences after the 10 day standstill period.

- Normal minimum mobilisation period 12 weeks (3 months) with an agreed “Go Live” date when the service will begin
- The steering group with a XXX oversees the process
- All the technical aspects of the delivery of the service is worked out e.g. staffing, premises, IT, referral process
- The contract with the new provider, including terms and conditions of delivery are refined and signed off by both parties during this period.
- The Key performance indicators are agreed

During the procurement process – you will:

- Use knowledge and wider patient and carer perspective when making decisions and not just personal point of view and experience
- Read and understand the service specification
- Consider other additional information - population of the borough, profile of service users
- Attend meetings with the project group overseeing the procurement
- In meetings- keep to the agenda
- Read the bids
- Analyse the information and examine what’s being offered by each provider
- Understand how the service will be delivered practically and how it will be received and used by patients
- Explore likely problems and potential solutions
- Score the bids following agreed guidance
- Explain the reason behind the scoring of each bid
- Ask relevant questions during meetings with bidders
- Go on site visits and ask relevant questions

During the mobilisation phase – you will:

- Help us hold the provider to account for the service being delivered
- Ensure that the services provides good patient experience
- Advise on how to launch the service to the users
- Advise on the communication routes and arrangements
- Review how the provider will undertake future patient / carer engagement

For contract monitoring – you will:

- Attend actual monitoring meetings
- Act as a mystery shopper from time to time
- Attend engagement event with current users and carers
- Help with surveying patients
- Attend CQG meetings
 - Consider quality and experience data
 - Establish how the provider measures experience and engages patients/ carers