



Clear, Compliant & Competitive

Setting your procurement up for success



Agenda



Shared Business Services

1 Our team & offering

2 Framework benefits & process overview

3 Capability Assessments

4 Preparing your tender docs

5 Evaluation and moderation – top tips

6 Completing your SLA (Order Form) compliantly

7 Key points to remember

8 Q&A

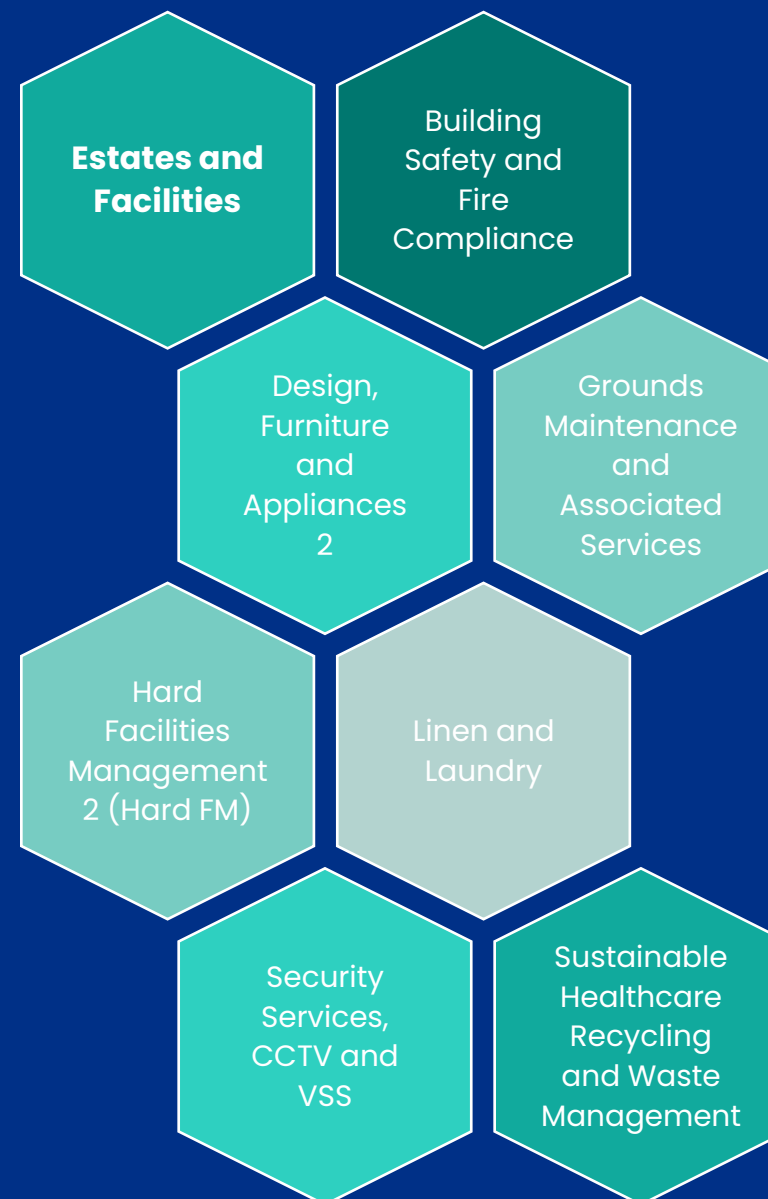
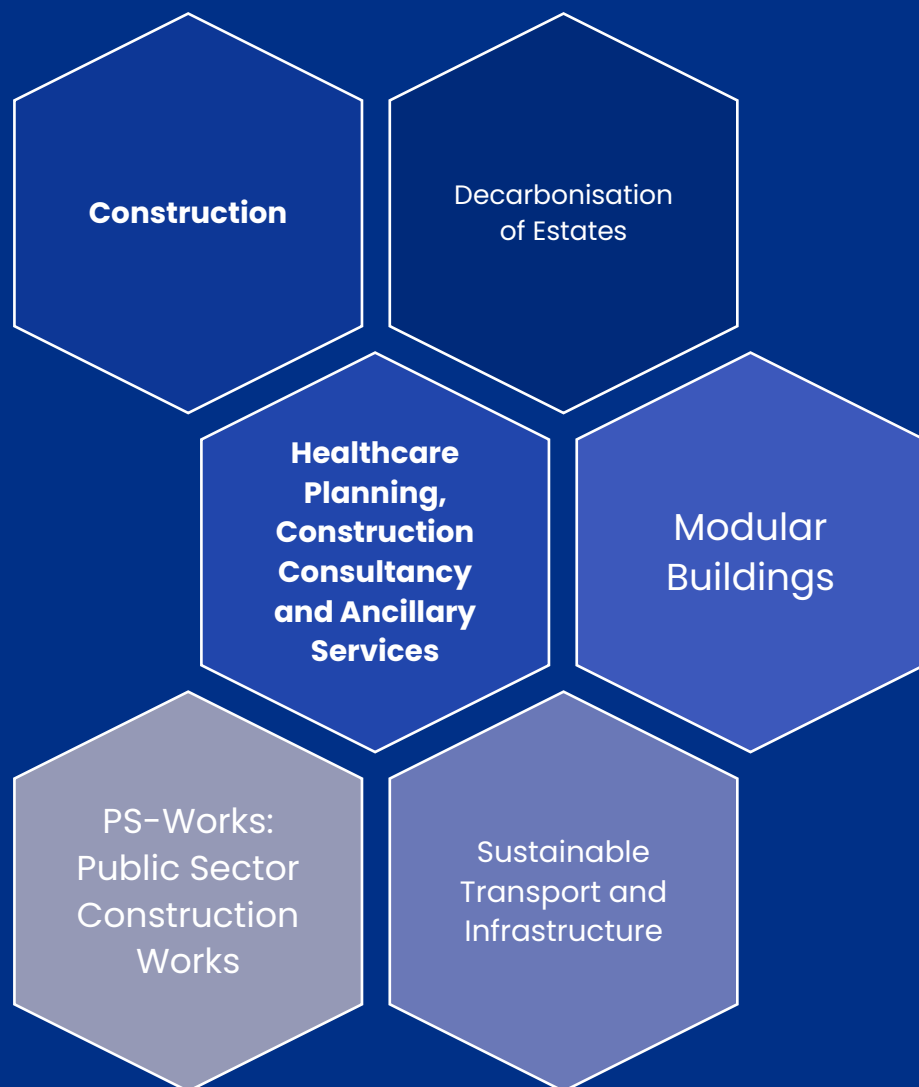
Our team & framework agreements

Construction & Estates

Our framework agreement offer



Shared Business Services



Healthcare Planning, Construction Consultancy & Ancillary Services



Shared Business Services

2000+ approved organisations

NHS SBS frameworks are open to all public sector organisations

Flexibility of call-off contracts

NHS terms as standard, or the option to use a wide range of industry-standard contracts at call-off



Secured capped rates

Secure and controlled price review provisions from year 2

Largest framework team at SBS

The HPCCAS team is always on hand to support our customers and suppliers

If you have any framework or procurement queries, do not hesitate to get in touch with the team on nsbs.ccs3@nhs.net

Process overview

Award routes under our framework agreement

Direct award



Ensure supplier is awarded to the relevant Lot



Agree on a rate and form of contract



Make initial contact with supplier via a CA1 or directly



Upon award, complete the SLA jointly with the supplier



Notify the supplier of the requirements, time frames and scope of work

Further competition



Capability Assessment 1 (CA1) to gauge interest



Evaluate the bidders as per the criteria in the tender docs



Second Capability Assessment (CA2) if numbers remain high



Upon award, complete the SLA jointly with the supplier



Develop tender documents and invite suppliers to bid

Capability Assessments

CA1 & CA2

Capability Assessments (CAs)



Shared Business Services



Key Reminders

- Most up-to-date framework documents to be used
- Read the guidance in full
- Include clear project detail
- All suppliers to be included
- Communication is key!
- Our support



CA1

- Clear context and background to the project
- Correct framework lot to be used for project
- Tendering portal information
- Recommended CA1 timeline of 5 working days



CA2

- CA2 stage is optional
- Include quality questions (2-3 Qs, max 500 words) and/or pass/fail questions
- Include a clarification stage
- Recommended CA2 timeline of 10 working days
- Suppliers to be notified of result following CA2 stage

Tender documents

Further competition

Preparing your further competition documents

Remember:

- Check the framework agreement weightings
- Framework regulations
- Insurances & accreditations
- Financial checks
- Requirements under the framework agreement
- Your further competition templates
- Portal/email
- Timescales – 4 weeks min.



Preparing your further competition documents

Advice from framework managers

- Are the objectives, scope and timeframes clear?
- Is all the customer information correct?
- Are all your documents correctly referenced?
- Are your quality questions clear?
- Case studies – format, word count, etc.
- Do your timescales match up with the amount of quality questions?
- What is the clarification deadline?
- How many suppliers are being invited to tender?
- Have all relevant suppliers been notified of the opportunity?



Evaluation and moderation

Top tips

Evaluation and moderation – top tips



Criteria

- Robust marking criteria
- Does it align with the quality questions and expectations?

Timescales

- Have you allowed enough time for your evaluation/moderation period?
- Consider clarifications, delays, feedback, award letters, etc.



Evaluators

- Evaluator training for each process
- Is everyone taking the same approach?
- Commercial evaluation

Moderation

- Importance of strong marking criteria
- Clear audit trail of comments
- Each evaluator contributing to outcome



Feedback

- Award letters for successful and unsuccessful suppliers
- Detailed comments on feedback to support outcomes

Completing your SLA

Compliance and importance

Completing your SLA (Order Form) compliantly

The SLA (Order Form) forms part of the overarching agreement between the client and the supplier and constitutes a legally binding contract.



Why is completing the SLA important?

- Compliance with the framework, sets out your agreements with the supplier.
- Maintaining these records enables us to address any potential issues that may arise



Terms and Conditions (Call-off Contract)

- You have the option to use the standard terms and conditions or other forms of contract.
- Please ensure that any changes or variations to the terms are documented in the Service Level Agreement (SLA). – this supersedes the main contract if the correct information is included.



Compliance

- We always recommend seeking legal advice if needed, for example If you need to make amendments to your contract, always make sure you are adhering to PCR regulations and your own internal governance.



Benefits of receiving SLAs

- Helps us with our framework data, knowledge which feeds into our contract management, and which helps us when we're renewing frameworks.

You can find the most recent version of the SLA template on the customer portal. Once the SLA has been completed and signed by both parties, please send a copy to nsbs.ccs3@nhs.net.

If in doubt about filling out any aspect of the SLA then get in touch with us, we're always happy to run it through.

Key takeaways

Points to remember

Key takeaways



Just ask!

If in doubt, contact the framework agreement team. We are here to provide our support, including reviewing/issuing CAs, reviewing further competition docs, and assisting with queries at any stage.



Framework agreement requirements

Ensure you are familiar with the specific requirements of the framework agreement you are using, i.e. weightings, procurement regs, Lots, etc.



Customer portal

Before accessing the HPCCAS framework, always download the latest version of the Buying Guide documents from our Customer Framework Agreement Portal.



Clear and robust

Ensure your documentation, evaluation, award letters and SLAs are as clear, detailed and transparent as possible.



SLA return

Don't forget to complete, countersign and return your SLA to us! It ensures compliance under the framework and covers you if there are any issues.



Communication is key

We know there can be unexpected delays, pauses or even termination of procurement processes. Provide regular updates for where your procurement is up to.

One final thing:

HPCCAS renewal underway

If anyone would like to be involved as a stakeholder, please get in touch with us!

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Shared Business Services

Thank you

Q&A

NHS Shared Business Services was created in 2004 by the Department of Health and Social Care to deliver the most cost effective and highest quality corporate services to the NHS. A unique joint venture with Sopra Steria, a European leader in digital services and software development, we make life easier for NHS employees, patients and suppliers, and deliver value for money to the taxpayer.

Proud members of the NHS family, we provide finance & accounting, procurement, workforce, digital and expert advisory services to more than half the NHS in England. Committed to being a force for good, we are dedicated to acting responsibly and sustainably at organisational, team and individual level. Sharing common values and unity of purpose with the rest of the NHS family, our solutions are underpinned by cutting-edge technologies and our teams' expertise, in-depth understanding of the NHS, and commitment to service excellence.

For more information, please visit **www.sbs.nhs.uk**