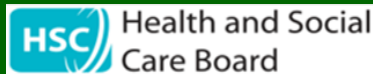


HSC NI Procurement Awareness Events

March - May 2017



Introductions

Business Services Organisation

- Peter Wilson, Assistant Director, Procurement and Logistics Service (PaLS)
- Orla Donachy, Head of Social Care, PaLS

Outline of Session

- Procurement in Health & Social Care
- BSO's role in Commissioned Health and Social Care Services
- Public Procurement Legislation – including Light Touch Regime
- Public Procurement Policy
- The Procurement Process:
 - Tender Preparation
 - Advertisement
 - Submission
 - Evaluation
 - Standstill
 - Award
- Maximising Your Chances of Success
- Tendering Support



Procurement in Health & Social Care

- Shared service since 1997
- Centre of Procurement Expertise
- Direct Services include:
 - Procurement - Goods, Services, ICT & Social Care
 - Warehousing & Logistics (inc materials management)
 - Capital Projects
- Services provided to all HSC Bodies
- Quality Agenda:
EFQM (Mark of Excellence) and ISO 9000

Procurement in Health & Social Care

- Managed Spend circa £674m pa on Goods and Services
 - Live contracts – over 2300
 - 51% NI Postcode
 - 43% NI SMEs
 - 74% SMEs
 - Procurement structured in “Category Management”
- Growth to include Commissioned Health and Social Care Services with an additional managed spend of circa £600m pa

BSO's role in Commissioned HSC Services

- The sole provider of specialist supplies services for HSC organisations in N.I.
- With recent changes to Public Procurement legislation HSC organisations have sought BSO to carry out their procurement (>EU threshold) activities by means of SLA
- BSO facilitates HSC organisations procurement of commissioned health care and social care services
- HSC organisations representatives are the decision makers in awarding contracts
- HSC organisations remain Contracting Authorities resulting from any procured contracts

Legislation

TFEU Principles

- Transparency
- Equal Treatment
- Non Discrimination
- Proportionality

TFEU Freedoms

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

Legislation

- EU Public Contracts Directive 2014
- Public Contracts Regulations 2015 for England, Wales and Northern Ireland - Light Touch Regime (Regulations 74 -77)
- The Public Procurement (Amendments, Repeals and Revocations) Regulations 2016

Light Touch Regime (LTR)

- Social and other specific services, Regulation 74 – 77
- These Regulations apply to contract values >£589,148 (EU Threshold)
- Contracts above the Threshold will need to be advertised in OJEU - will be coordinated by BSO
- However contracts below this threshold do not need to be advertised in OJEU - will continue to be awarded by HSC organisations

Light Touch Regime

The Regulations requires that authorities award above threshold contracts for these services in the following way:

- Publication in OJEU of a call for competition – a Contract Notice which shall state:
 - Conditions for participation
 - Time limits for contacting the Contracting Authority
 - Award procedure to be applied
- Time limits must be reasonable and proportionate
- The Regulations allow for flexibility in the procedures and techniques used

NI Public Procurement Policy

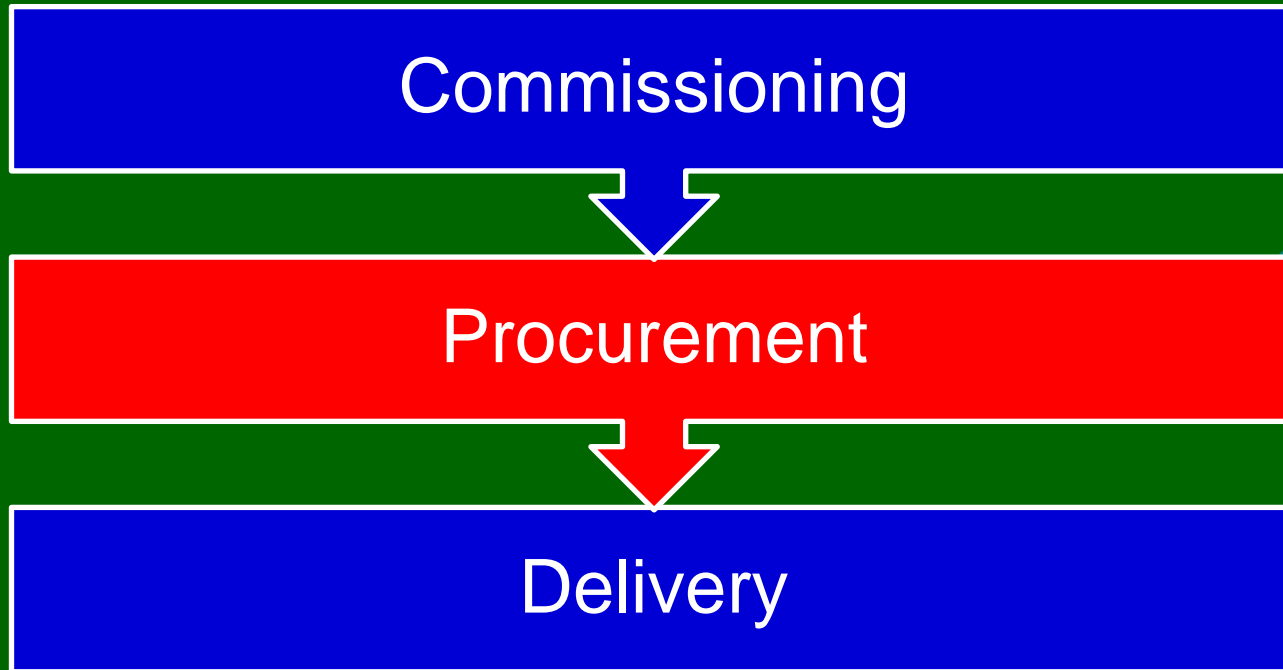
- Developed in 2002 (v11 Revised August 2014)
- Established the NI Procurement Board and CoPEs
- Definition of Public Procurement:
“is the process of the acquisition, usually by means of a contractual arrangement after public competition, of goods, services, works and other supplies by the public service”
- Definition of “Best VFM”:
“the most advantageous combination of cost, quality and sustainability to meet customer requirements”

<https://www.finance-ni.gov.uk/sites/default/files/publications/dfp/ni-public-procurement-policy-version-11-august-2014.pdf>

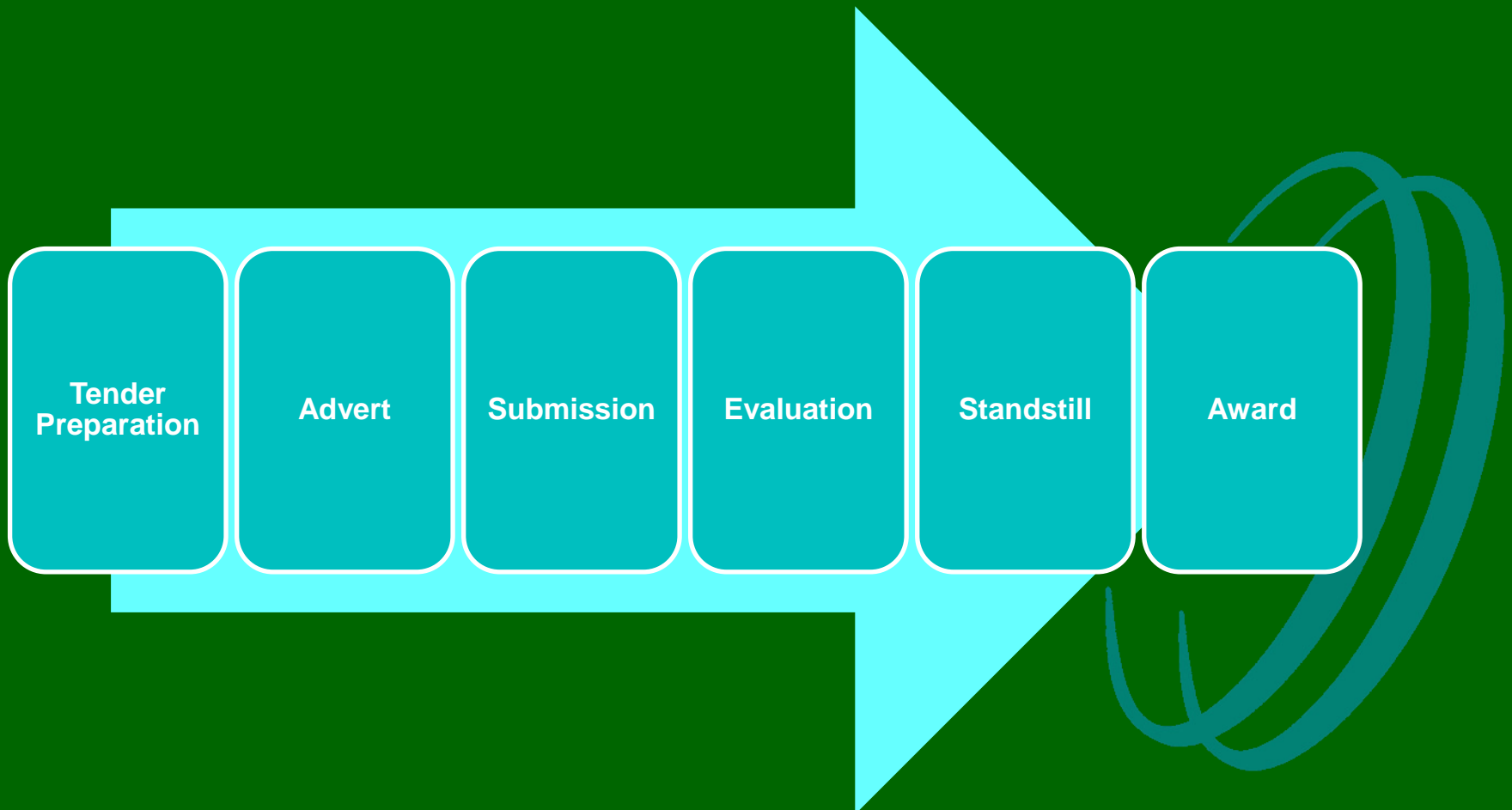
NI Public Procurement Policy

- Procurement Guidance Notes useful to providers:
 - PGN 01/11: A guide for Social Economy Enterprises:- *aims increase knowledge and understanding of public sector procurement and in so doing, helps to develop capability to compete successfully for public sector contracts.*
[PGN 01/11 - A Guide for Social Economy Enterprises](#)
 - PGN 02/12: A Guide to Public Procurement for Small and Medium Sized Enterprises:- *aims to help small and medium sized enterprises (SMEs) increase knowledge and understanding of public sector procurement (supplying goods, services and works to the public sector).*
[PGN 02/12 - Public Procurement: A Guide for Small and Medium Sized Enterprises \(SMEs\)](#)

Commissioning and Procurement



Procurement Process

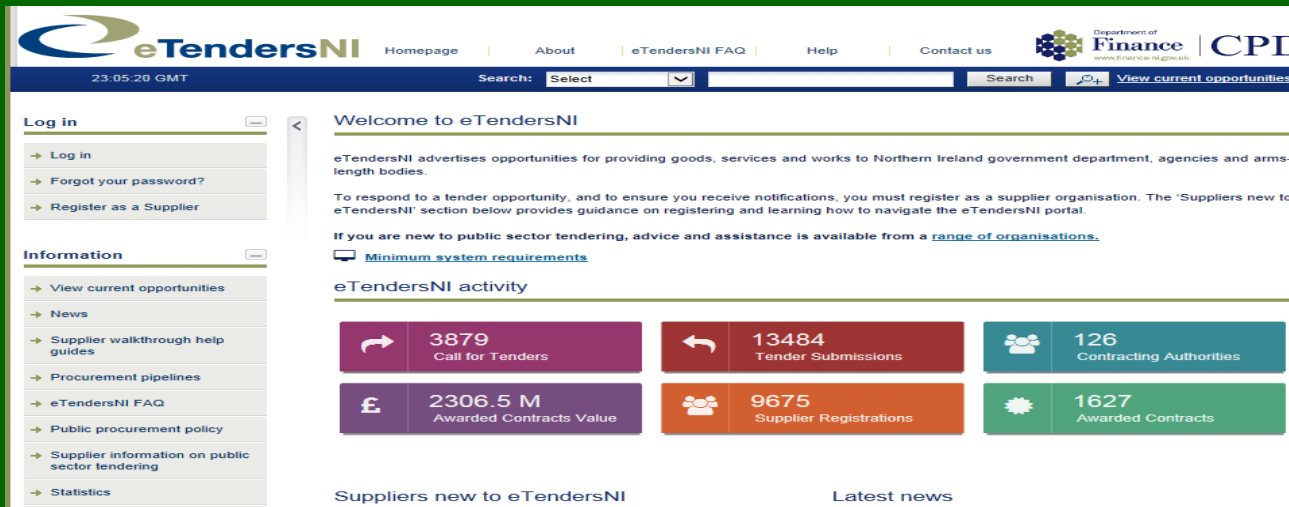


Tender Preparation

- Assessment of client needs
- Review existing arrangements
- Develop a service model
- May include:
 - Personal and Public Involvement (PPI) activities
 - Pre market engagement
- Assess resources required
- Prepare procurement strategy to approach the market with
- Develop tender documentation with consideration of social value
 - the additional value created in the delivery of a service contract which has a wider community or public benefit
 - equal treatment / even playing field

Advert

- All Tender opportunities will be advertised at:
www.etendersni.gov.uk



The screenshot shows the eTendersNI website homepage. The header includes the eTendersNI logo, navigation links (Homepage, About, eTendersNI FAQ, Help, Contact us), and logos for the Department of Finance and CPD. A search bar is present with a dropdown menu and a search button. The main content area features a 'Welcome to eTendersNI' message, a 'Log in' section with links for 'Log in', 'Forgot your password?', and 'Register as a Supplier', and an 'Information' section with links for 'View current opportunities', 'News', 'Supplier walkthrough help guides', 'Procurement pipelines', 'eTendersNI FAQ', 'Public procurement policy', 'Supplier information on public sector tendering', and 'Statistics'. The 'eTendersNI activity' section displays six statistics in colored boxes: 3879 Call for Tenders, 13484 Tender Submissions, 126 Contracting Authorities, 2306.5 M Awarded Contracts Value, 9675 Supplier Registrations, and 1627 Awarded Contracts. At the bottom, there are links for 'Suppliers new to eTendersNI' and 'Latest news'.

Activity	Value
Call for Tenders	3879
Tender Submissions	13484
Contracting Authorities	126
Awarded Contracts Value	2306.5 M
Supplier Registrations	9675
Awarded Contracts	1627

- Tenders are open to all providers – Community, Voluntary and Private

Advert

- Current opportunities details:
 - Call for Tender (CfT) Title
 - Contracting authority
 - Date published
 - Tenders Submission Deadline
- Inclusion of any Social Clauses (Buy Social NI)



Submission

- Providers must firstly register on www.etendersni.gov.uk portal - including DUNS number which can be acquired
- Download the tender preparation tool (20.1MB, takes time)
- Full instructions will be included in the Call for Tender (CfT)
- Complete all sections as instructed
- Include all requested information including certificates
- Comply with the closing date and time – don't leave it too late!
- Clarifications can be sought via the eTendersNI portal

Evaluation

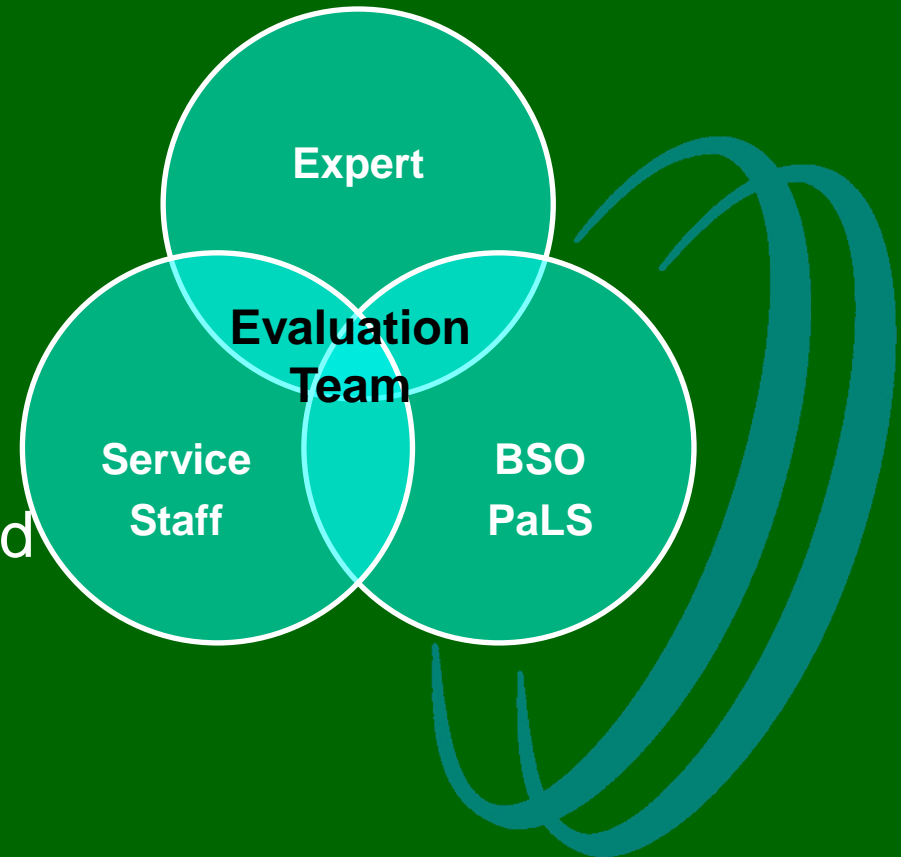
- **Evaluation Team**

- Act on behalf of the Contracting Authority not themselves
- Service staff with appropriate knowledge tasked to select the right service from those tendered
- Involving experts to the service
- Facilitated by BSO (PaLS)
- Minimum of 3 representatives
- Independent from any tenderer
- Agree the tender documents
- Evaluate and score tender responses

Evaluation



- Decisions based on weighted criteria and clear scoring
- Process described in the evaluation methodology
- Three envelope system



Evaluation

Question areas:

- **General Questions** – information only
- **Exclusion Questions** – Pass/ Fail – Mandated Legal
- **Selection Questions** – Pass / Fail - Mandated Economic and Financial standing, Technical and Professional ability
- **Award Questions:**
 - linked to subject matter of the service and looking to the future
 - Most Economically Advantageous Tender (MEAT) not lowest price i.e.% Split between Quality and Price

Standstill

- The Contracting Authority notifies all tenderers of the contract award decision before it concludes the contract with the winning tenderer
- Not a mandatory requirement of Public Contract Regulations 2015 for Social and Other Specific Services
- Discretionary waiting period (at least 10 days) between decision to award a contract and the signing of the contract
- Cooling off period
- Tenderers advised of the basis of the decision the Evaluation Team plans to make

Award

- The Contracting Authority notifies the successful tenderer in writing that their tender has been accepted for the contract award
- The contracting authority must publish a contract award notice in the OJEU, this may be done on a quarterly basis

Maximising Your chances of success

- Influence at the commissioning stage
- Follow the instructions
- Its like an exam – always read the question!
- Take nothing for granted!
- Don't be afraid to ask for clarification
- Read the Evaluation Methodology (TEMMS)
- Check the weighting of criteria
- Learn from the experience – lose or win
- Tips For Tendering – <http://www.hscbusiness.hscni.net/services/2176.htm>

Tendering Support

Further support and assistance is available from:

- Invest NI
- Inter Trade Ireland: Meet the Buyer Events and <http://www.intertradeireland.com/tendersuccessfully/>
- Local Council Business Development Team
- NICVA
- <https://www.nibusinessinfo.co.uk/content/tendering-contracts>

Thank you for listening.

Any questions?

