

DOING BUSINESS
WITH THE TRUST

TENDERING FOR TRUST
CONTRACTS

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Section One: National Health Service (NHS) Procurement

Airedale NHS Foundation Trust recognises that the correct management of procurement is essential to the efficiency and effectiveness of clinical and support services. Patient care depends on the assured availability of high quality equipment, goods and services. Effective procurement is crucial to achieving the Trust Procurement Strategy 2013-2018 and in particular to securing best value public services.

It can also help the Trust meet its wider objective of supporting local businesses, helping the regeneration of the health economy, reducing administrative costs and minimising the Trust's overall impact on the environment.

The Trust aims to continually improve procurement. This is set out within the Trust's Procurement Strategy which is included within the Trust's Integrated Business Plan (IBP) across all aspects of work associated with the procurement of goods and services.

Kath Aspinall MSc, MCIPS, MInstLM
Head of Procurement and Supplies

Section Two: Introduction

- 2.1 Airedale NHS Foundation Trust spends approximately £23 million in the private sector each year, providing companies of all sizes with a wide range of commercial opportunities. The goods and services contracted for vary, for example, from supplying and fitting a carpet to the construction of major buildings; and for the provision of equipment from pens and paper clips to MRI scanners and other high value medical equipment.
- 2.2 As part of our corporate strategy we would like to work in partnership with local suppliers by encouraging them to tender for Trust's contracts. Discussions with local business leaders have highlighted that often a lack of information about business opportunities and lack of awareness about the tendering process may well be stopping them from applying for the Trust's tenders.
- 2.3 The aim of this guide is to help all potential contractors, consultants and suppliers to tender for the Trust's business. The guide aims to answer some of the common questions raised by contractors when first considering doing business with the Trust. It explains what legislation affects the Trust's tendering requirements and looks at the procedures necessary to secure Trust contracts. For example how to become an approved supplier, the tendering process and the code of practice when working with the organisation.
- 2.4 There is of course a great deal of competition for the Trust's business, and this guide cannot guarantee individual companies success. However, it should provide the framework for assisting companies during the tendering process.
- 2.5 For ease of reference, the remainder of this booklet is structured as follows:

Section 3

Legislation and Codes of Practice

Section 4

Information required by the Trust

Section 5

Tendering Process

Section 6

Key contacts

Section Three: Legislation and Codes of Practice

3.0 Introduction

The Trust conducts its business within the legal framework as determined by Statute and Codes of Practice issued by the Department of Health and related bodies. The Trust has developed its own code of practice to fulfil its legal, moral and ethical objectives. This section highlights some of the key issues that potential contractors need to be aware of when tendering for the Trust's business.

3.1 Health and Safety

3.1.1 Section 2(3) of the Health and Safety at Work Act 1974 requires that all companies employing 5 or more persons shall have a written statement of health and safety. There are two guidance pamphlets issued on health and safety policies by the Health and Safety Commission:

- a) Writing a Safety Policy Statement – Advice to Employers (Ref. HSC6); and
- b) Construction Industry Advisory Committee pamphlet – Guidance on the Implementation of safety Policies (Ref. IAC/A1).

These are available from:

Health and Safety Executive
Baynards House
1 Chepstow Place
London

3.1.2 Many of the works of building construction and maintenance fall within the scope of the Construction and Design Management regulations (CDM).

3.1.3 Permit to work systems are employed by the Trust in pursuance of safety and apply to a number of activities, eg. electrical work, piped medical gases, hot working, etc.

3.2 Equal Opportunities for the Trust

3.2.1 Equal Opportunities for the Trust means that all members of our community irrespective of gender, race, disability, culture, religion, ethnic background, sexual orientation, and/or age have equal access to our services, employment and contracts.

3.2.2 In line with the Trust's equality strategy, all contractors will be evaluated by the following:

- Common contract conditions and contract documents
- Ability to meet contract conditions
- Monitoring performance, and
- Not including contractors who cannot meet the requirements in the tendering process.

3.2.3 The Trust's philosophy is to do business with those organisations with similar aims and objectives regarding equality and diversity.

3.3 **Environmental Matters**

3.3.1 The Trust is committed to improving its own environmental performance through use of best available materials, practices and technologies. In order to fulfil this objective, the Trust expects companies, from whom it purchases goods and services, to demonstrate similar levels of environmental care and commitment.

Section Four: Information Required by the Trust

4.0 Introduction

This section highlights some of the key information required by the Trust from companies wishing to tender for contracts.

4.1 Company

- 4.1.1 You will be required to complete an 'invitation to tender pack' and provide specific details about your company. This includes contact names for both the tendering process and future tender invites.

4.2 Technical

- 4.2.1 The Trust needs to ensure that the company is capable of carrying out the work for which it is tendering for; therefore the following information will be required (highlighted in 4.2.2). Furthermore, you should not ask to be considered for work/services that you would totally sub-contract out to other companies.

- 4.2.2 For works of construction, building and engineering maintenance and repair, the Trust uses the services of Constructionline to provide suitable lists of tenderers. Companies wishing to tender for this type of work where the value exceeds £10k should contact Constructionline, telephone number 0870 240 0152.

For certain categories of work, contractors must hold registration of their competence to undertake the work, eg. Confederation of Registered Gas Installers (CoRGI), National Inspection Council for Electrical Installation Contracting (NICEIC). Certain works can only be tendered for by specialist contractors, eg. piped medical gas systems.

4.3 Financial

- 4.3.1 The Trust requires information relating to the financial position of your company.

Ideally your company will be fully registered on NHS Sid4Gov, website: <https://sid4gov.cabinetoffice.gov.uk/login>

Your company will be asked to provide insurance cover for works and services. Your company must carry Employers' Liability at about £ 5 million and Public Liability at about £5 million insurance cover. If you are a sole trader or partnership you may not be required to carry Employers' Liability. For some specialist contracts you may be required to carry Professional Indemnity insurance, Product Liability insurance or Fire/Contract Works insurance.

Section Five: Tendering Process

5.0 Introduction

All contractors for goods and services are eligible to bid for work as long as they meet the set selection criteria and have appropriate equal opportunities, health and safety requirements and environmental policies. There are three different types of process to follow which depend on the value of the goods and services being tendered for.

5.1 The Quotation Process

The Trust does not only deal with contracts worth large amounts. There are contracts ranging from a few hundred pounds up to ten thousand pounds each, for which there is no need to go through the official tendering process. Individuals or companies can write to the Trust at any time expressing their interest in doing business with the Trust. Alternatively, suppliers can register their interest on our on-line quotation system (see page 14 for more information on how this works). This system is used for all quotations up to £20,000 for small jobs/work/provision of services and goods.

For goods and services over £20,000 but below £30,000 a more detailed procurement process is required in order to comply with the Trust's Standing Financial Instructions (see page 12).

(See back of booklet for further details.)

5.2 The Tender Process

For all goods and services valued above £30,000 the tender process comes into operation. All prospective contractors will be sent tender documentation. *The tender documents usually contain the following information:*

- Letter of invitation and instructions to tenderers.
- Pricing document and/or form of tender.
- Specification and/or schedules of rates.
- Contract conditions or conditions of purchase.
- Method statement requirements (if appropriate).
- Any relevant supporting information.
- Draft contract

(See back of booklet for further details.)

5.3 You will be asked to complete and electronically return your tender documents by a given time and date. The tender documents are all opened at the same time. If you fail to return your tender documents by the specified deadline your tender will be excluded from the evaluation process.

5.4 Once the Trust has awarded the contract the successful company will be sent an official order or a formal contract will be drawn up.

5.5 The European Tender Process

All tenders over £118,133 (excluding VAT) for the supply of goods and services, and £4,551,413. (excluding VAT) for works are advertised in the Official Journal for the European Union (OJEU) in line with EU Legislation. Information on OJEU can be found on www.echo.lu/ted.

5.6 Tenders up to £118,133 (excluding VAT) for the supply of goods and services, and £4,551,413 (excluding VAT) for works will be advertised on the government website Contracts Finder; they could also be advertised in local and national newspapers and in specialist trade journals as appropriate. *(See back of booklet for further details.)*

5.7 **Contract Performance**

There are procedures in place for monitoring the performance of all companies carrying out contracts for the Trust. All companies are monitored to assess their compliance with pre-defined performance criteria. *The three key elements of the monitoring process are:*

On-site monitoring

Once the contract specification has been agreed, your company's performance will be monitored regularly to ensure quality and that the agreed work schedule is strictly adhered to.

Variations

From time to time variations may be required to the contract. The Trust will always request variations in writing, except in an emergency where instructions may be made verbally but will be confirmed in writing.

Post Contract Evaluation

All contracts are evaluated once completed. Contract performance is monitored and recorded for future reference.

5.8 **Unsuccessful Applications**

Unsuccessful applicants will be notified automatically, and an opportunity will be offered to unsuccessful applicants to discuss their tender if they so wish by contacting the Head of Procurement and Supplies or Managing Director.

Section Six: Tendering Top Tips

- Fully read all the instructions provided.
- Make sure you read the specification carefully and ensure that you meet all the requirements; you must provide evidence to support your responses.
- If you don't understand the specification or other requirements contact the procurement officer for clarification.
- Always use the pre-formatted tender documents provided, rather than your own as it helps us in our evaluation.
- Answers should be clear – do not presume that the evaluation team know your business as the team comprises many representatives.
- Information and answers need to illustrate how they meet the scope of the specification. For example, if you are requested to provide an outline of previous experiences, these need to demonstrate how they relate to the requirements of the contract.
- Input responses that allow evaluation. For example, do not state that you will provide information/answers later, as the evaluation team will be unable to assess the response if none is provided.
- If your answer to any question is **no** or **none**, please state **no** or **none** rather than leaving the space blank.
- It is the quality of the information submitted not the quantity. Always answer **all** the questions and submit **all** the additional information asked for. Do not dress the information up or try to be economical with the truth.
- When asked to provide references, please provide relevant names of organisations that you have carried out the same type of work for.
- When asked to provide accounts, provide the most up to date set(s).
- Check that you have enclosed everything that was asked for and if applicable include section references.
- Please ensure that you send your tender submission in sufficient time to reach the Trust **before** the deadline date and time.

The Office of Government Commerce (OGC) together with the Small Business Service (SBS) have launched a website 'Supplying Government' to help small businesses supplying to the government.

The following guidance is for SMESuppliers bidding for government contracts:
<https://www.gov.uk/guidance/doing-business-with-government-a-guide-for-smes#tips-for-smes-bidding-for-government-contracts>

Section Seven: Key Contacts

7.0 Introduction

Tendering for contracts can be a daunting experience especially for companies considering such ventures for the first time. The guidelines highlighted in this document give a brief overview of some of the processes and for a more in depth discussion regarding the tendering of Trust contracts:

For General Contracts and the Provision of Goods, Services, Minor Building Works and Maintenance Contracts contact:

Kath Aspinall
Head of Procurement and Supplies
Procurement and Supplies Department
AGH Solutions Ltd
Skipton Road
Steeton
Keighley
West Yorkshire
BD20 6TD

Tel: 01535 294511
Fax: 01535 294897
E-Mail: kath.aspinall@anhst.nhs.uk

For Building and Engineering and Capital Construction Contracts contact:

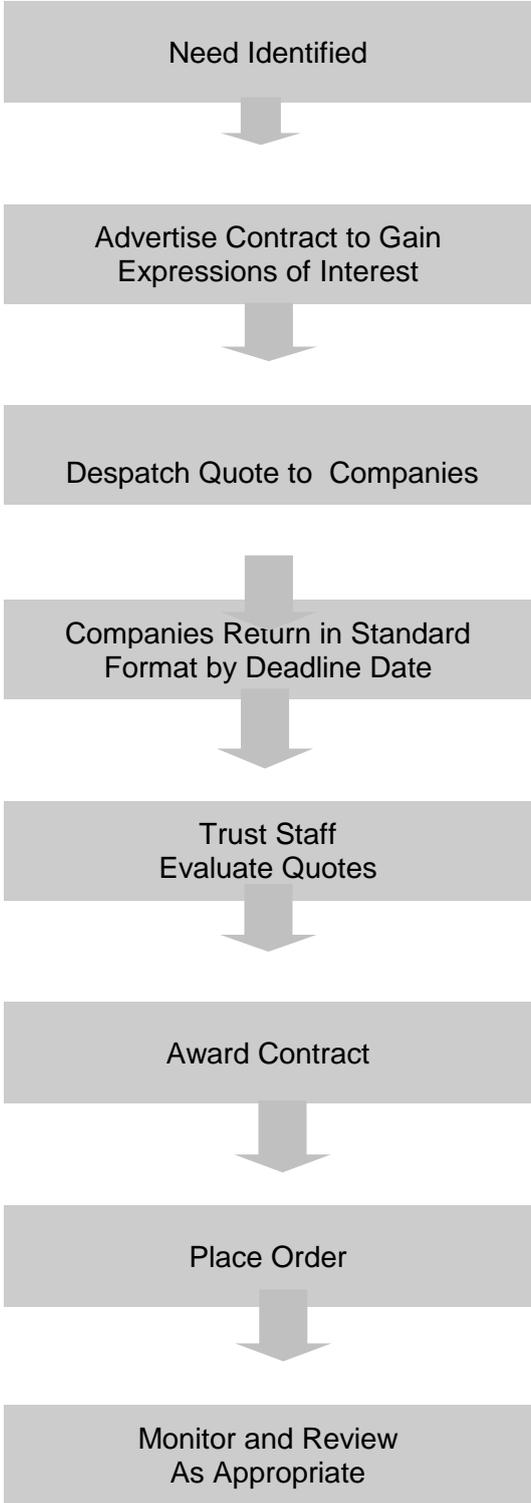
David Moss
Managing Director
AGH Solutions Ltd
Skipton Road
Steeton
Keighley
West Yorkshire
BD20 6TD

Tel: 01535 294826
Fax: 01535 294819
E-Mail: david.moss@anhst.nhs.uk

Tender and Quotation Process Charts

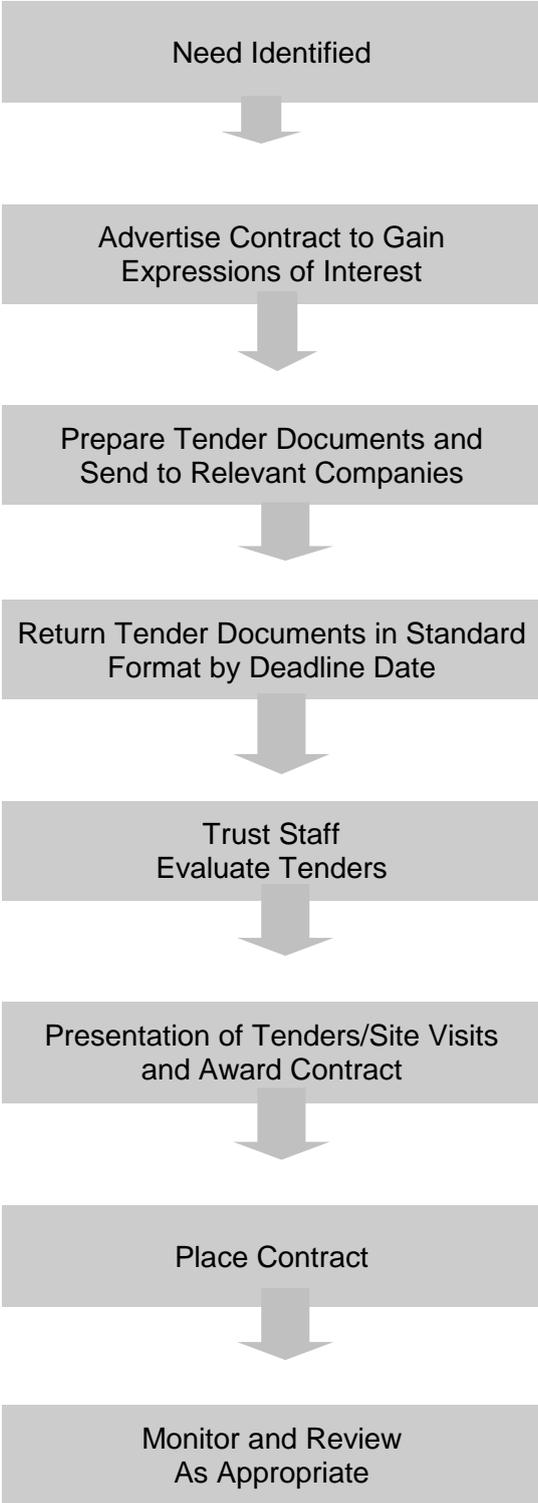
The Quotation Process

Low Value - £10,000 to £30,000
(Optional up to £20,000 if single source supplier)



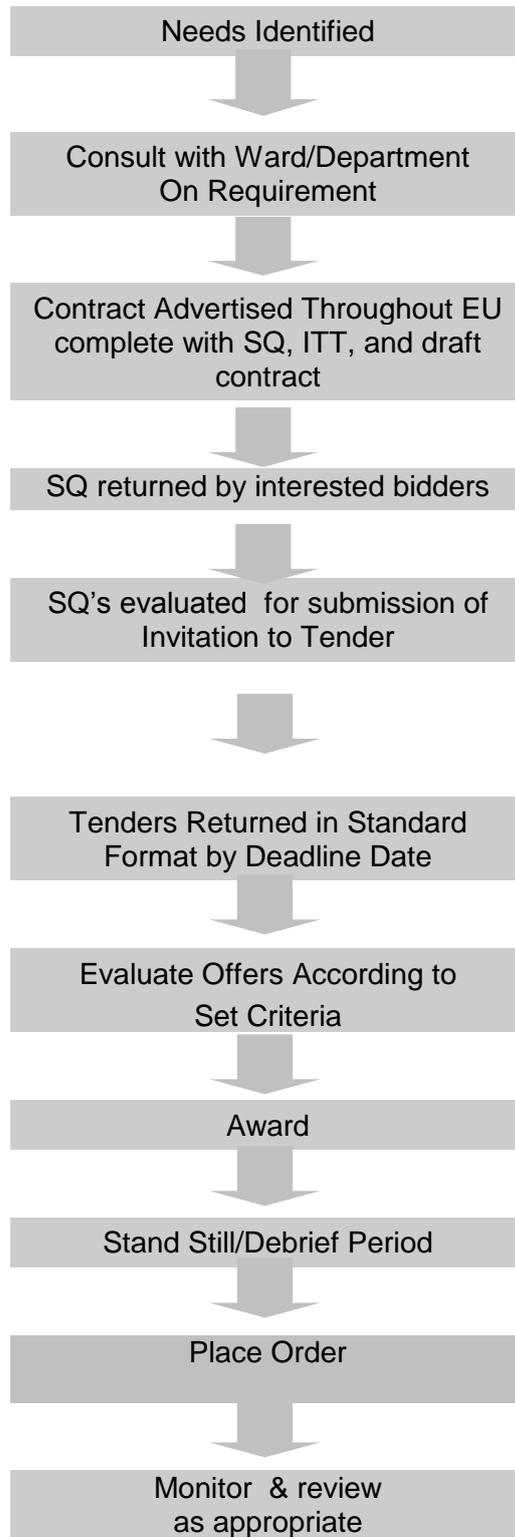
The Tender Process

Medium Value - £30,000 to EU Limits



The European Tender Process (The Restricted Procedure)

Goods and Services Above £118,133 exc VAT
Works Above £4,551,413 exc VAT



On-Line Registration

Web address: www.multiquote.com

For more information contact supplierinterest@anhst.nhs.uk

'Multiquote' provides Airedale NHS Foundation Trust Supplies with a quotation tool, typically used for ad hoc orders for values between £10 – £20,000.00.



Airedale NHS Foundation Trust

Recent tenders and awards

<u>Type</u>	<u>Description</u>
Contracts Finder	Provision of Neurophysiology Services
Contracts Finder	Removals, Light Haulage and Waste Removal
Contracts Finder	Framework for Executive and Non-Executive Recruitment
Contracts Finder	Installation of Power and Data Ducting
Contracts Finder	Varicose Veins Diagnostics Managed Services

AGH Solutions Ltd

Recent tenders and awards

<u>Type</u>	<u>Description</u>
Contracts Finder	Alterations to Pathology Labs and Mortuary
Contracts Finder	Refurbishment of the Child Development Centre
Contracts Finder	Preventative Lift Maintenance, Servicing and Repairs

Current quotes and tenders

<u>Type</u>	<u>Description</u>
Contracts Finder	Pest Control
EU	Mixed Business Waste
Contracts Finder	Taxis and Taxi Freephones
Contracts Finder	Organisational Development for the Bradford and Airedale Stroke Service

Planned quotes and tenders

<u>Type</u>	<u>Description</u>
Contracts Finder	Minor Building Works
Contracts Finder	Private Hearing Aids and Batteries