

## Introduction to Tendering for Health and Social Care Contracts

TfC offers a basic course for organisations starting or contemplating tendering for public sector contracts. The course emphasises the fundamental differences between private and public sector tendering. The training may be used to help managers to consider in detail how tendering may affect the company as a whole. The course may be for individual companies or organisations, for "umbrella" type organisations or Trade or similar Associations who wish to offer the training to their membership. Public sector purchasers have offered the course to their current contractors to help them prepare to tender by raising awareness of the tendering process and their requirements. Whilst we offer a standard package, we are happy to work with you in order to tailor the training to your precise requirements.

We offer an all-in package. This includes all participants receiving a CD containing a wide range of information which we consider to be essential for those involved in the tendering process. We make a single charge for groups of up to 18 people. We can accommodate larger numbers subject to prior discussion.

**Our Standard Training Workshop** covers the following:

### Part 1

Tendering effectively requires an understanding of the legislative and practical background within which procurement is currently taking place and the processes which drive tendering procedures. The completion of the Pre Qualification Questionnaire (PQQ) is the essential first step in the "Restricted", "Negotiated" and e-procurement procedures and opens the door to the invitation to submit a full tender. These procedures are also used in the establishment of "Frameworks". The tendering procedures are now important as they often produce a framework of organisations who are allowed to go on to tender for specific contracts over a period of 3/7 years – "you have to be in it to win it" or alternatively face exclusion from being able to contract to provide services over a long period.

This part of workshop will focus on the procedures which are used for each style of tendering, the PQQ and other tendering requirements. We will look at the agenda being followed by procurement officers including what they look for at appraisal and how the corporate structure might respond to the requirements.

### Part 2

Real success in tendering lies in having a clear understanding of exactly what purchasers are looking for in tender appraisal and how to ensure that your tender will score well. Two selection methodologies may be used in the selection process – Lowest Price and Most Economically Advantageous Tender (MEAT). During this Workshop we will:

- consider model appraisal schemes for areas including Equality and Diversity, Environmental Policy, etc.;
- consider an actual scoring scheme in order to work out how well tenders might perform;
- identify how to improve the techniques of tender preparation in order to better meet the requirements;
- consider the corporate impact of the tendering process.



## Learning Objectives

Understanding the legislative background to tendering – the rules with which the purchaser must comply and how these are addressed in the PQQ:

- the legal and regulatory framework within which tendering operates;
- the processes which are used for each type of tender;
- what is required to produce a successful PQQ;
- what companies and organisations can do to increase their chances of success at the selection (PQQ) stage;
- what are the common pitfalls?

The second, or award, stage of tendering involves responding to the Invitation to Tender (ITT) and completing a Method Statement.

- developing an understanding of commonly used scoring systems;
- explain exactly what appraisal officers are looking for during tender appraisal;
- identify how method statements and tenders generally can score well and be competitive;
- use actual tenders to see how the processes work in practice;
- consider model appraisal schemes and see how these are used to score tenders;
- look at the importance of policies and how they are scored.

## Course Content

The course is structured in three parts which cover the following:

- i) Legal and Regulatory back ground to public procurement;  
Treaty obligations – competition law;  
CPV codes/Part B contracts and how this affects tendering in the health and Social care sectors;  
How does procurement work – the systems in general use
- ii) The selection phase and the PQQ  
The purchasers are looking for a demonstration of capacity and capability to: deliver a contract with the public sector – they are looking for evidence of this – how does a providers demonstrate this? what are the key elements of the way in which the organisation is structured? What evidence is the required? and how does this affect scoring?
- iii) The Award phase and the Method Statement – how this is scored  
Tender appraisal;  
How does tender appraisal work? What happens to a tender from receipt to contract award?  
How are tenders scored? At the selection phase and the award phase.  
Scoring price;  
Bringing it all together to a final score  
Challenging and the Remedies Directive.

**The Workshop is usually run** from 10.00 am to 3.30 pm, but other delivery models are possible.

**We supply** a projector and computer, but require a flip chart and screen.

**We need a room layout** in a U-shape, with tables and a top table.



**Variations to the Workshop** might include:

- an emphasis on developing a response to the "sustainability question"
- tender pricing
- an emphasis on e-procurement

**Fee package**

For the in-house workshop as set out above our fees are as follows

- Fee - £900
- O/N accommodation on the night prior to the event (this is excluded from events run within 30 minutes travelling time of Matlock, Derbyshire or within the M25). Please note that one of our tutors is disabled and requires accessible facilities. She is driven to events by her husband. Therefore level access is required also for the O/N a double accessible room is required and reserved disabled parking at all locations. The cost of the accommodation is usually paid directly by the organiser. This avoids potential difficulties regarding VAT.
- Cost of travel.
- VAT on the above.

**CPD Certification**

- Fee - £20 per person + VAT

**In order to discuss** your individual requirements

please telephone 01629 57501

or email [info@tenderingforcare.com](mailto:info@tenderingforcare.com)

**Participants** in previous in-house workshops said:

*well presented. Tutor very knowledgeable and gave useful information*

*excellent day – challenging!*

*many pieces of a jigsaw have been put together*

*excellent level of knowledge*

*it was worth having the training here as it enabled us to focus on tendering as it applies to us*

*it was wonderful to have the big picture and fit my charity into it. Just Brilliant. Moved my thinking on be 10 leaps!!*

