

Procurement Services Specification - Framework

Strategic Procurement

The provision of a strategic procurement service to enable and assist the call authority to maximise its purchasing powers whilst remaining compliant with its internal policies (including procurement policies), guidance from the Department of Health and relevant EU Legislation. This will include the development of procurement work plan, analysis of spend data, accessing frameworks and the creation of contracts. Lot 2 will include the provision of a transactional procurement service that provides support to operational staff in sourcing items as well as producing and issuing purchase order numbers. The service will also provide product catalogues to enable the efficient ordering of common items along with the benefit of rich data that this provides. Lot 2 includes the following services:— Strategic Procurement;— Transactional Procurement;— Materials Management.

Ref	Title	Description
	Local Work Plan	<ul style="list-style-type: none"> • Development and production of a work plan to assist with cost improvements for the Authority taking into account analysis of expenditure and ensuring compliance with the Authority's SFI's and relevant legislation, market conditions and initiatives . • Delivery of workplan including measurable cash releasing savings. To enable the Authority to amend budgets appropriately to reflect initiatives. • Liaise with Authority stakeholders to on-board and obtain approval of the work plan.
	Strategic Sourcing	<ul style="list-style-type: none"> • Advise Client on most suitable procurement route to satisfy the need identified during initial scoping (i.e. the use of government framework contracts)) • Provide advice on and encourage the inclusion of SME's • Provide support on initial market engagement to provide better understanding of the feasibility of the requirements and the capacity of the market to deliver • Guide the Client on the assessment of the market as per Client needs • Advise the Client on the procurement processes available considering best value for the Authority and compliance with Government guidance • Help to identify the Client requirements and develop a specification • Advise on best procurement strategy • Assist on the request of information required for the tender documentation • Identify procurement process and tools to allow market participation and ensure best value for money • Define risks and benefits on the Client's preferred route • Assist the Client to determine the need to initiate a procurement process depending on the characteristics of the market and legal requirements to procure • Assist the Client in the recording of the decision making process following procurement advice • Provide project governance plans and guidance for each procurement exercise • Support to establish Work streams and project steering group if required • Advise on conflicts of interest, whether actual or perceived, by assisting with the assessment of project

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group member/ stakeholder interests

- Advice on steps to be taken to manage such conflicts and mitigate risks
- Help to identify relevant (NHS) terms and conditions for the specific project
- Assist with the drafting of the tender documentation
- Support in relation to structure and content of specification
- Provide support to the Authority client in all phases of the procurement project:
- Pre Procurement market engagement/bidder events
- Expressions of Interest
- Pre-qualification of bidders including defining associated evaluation methodology using standard government documentation
- Assist with the preparation of tender documentation including defining associated evaluation methodology and Commercial evaluation of responses (at PQQ and ITT)
- Management of bidder Clarification Question (CQ) processes (at PQQ and ITT)
- Award process (including standstill/Alcatel periods where appropriate)
- Assist on the preparation of debriefs for unsuccessful providers
- Prepare draft all contract documentation as per specifications, including the Authority's Client requirements clarified during tender evaluation process, or handover all appropriate documentation to Contracting Lead for Contract drafting and finalisation
- All contract documents to be prepared using the NHS standard Terms and Conditions
- Prepare and post associated OJEU & contracts finder procurement notices
- Facilitate evaluation and moderation of proposals at all stages of procurement
- Provide sourcing methods, costings and other commercial or technical advise
- Co-ordination and arrangement of all contacting the Authority Client and assist with clarification processes
- Prepare ratification reports to contain decision making process on the selection for approval by the client
- Draft communication to successful bidders and start Standstill period if relevant
- Provide all tender documentation to be included in the contract
- Provide advice to contracts manager on essential requirements where requested
- Risk assessment of terms and conditions provided by Bidders (in specific circumstances -otherwise NHS terms and conditions must be used)
- Advise on the warranty and termination clauses in contracts
- Review penalty clauses and possibility of financial claw back
- Provide procurement advice to the Client on compliant procurement process, in writing when necessary
- Provide a risk register that highlight the advice given and the consequences of following a different process/route
- Ensure regular communications with nominated Client Leads on current procurement issues

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		<ul style="list-style-type: none"> • Escalate any issues that may occur in any procurement processes to the relevant senior manager • Check existence of Frameworks to be utilised to ensure best value and compliance with Government Policy • Check existing contracts within the Authority to determine whether they can be utilised, to aggregate requirements • Liaise with the Authority's Client to seek necessary approvals as per the Client's Financial Policies • Prepare contract award documentation • Issue award documentation through e-tendering portal • Advise on Freedom of information request and obligations (where these relate to procurement activity undertaken for the Authority's Client) • Advise on the need for Credit Check reports or other financial status checks relevant to the nature or risk of the contract • Contract drafting and negotiation of terms and conditions • Provide procurement project initiation document and complete as per scope meeting as appropriate to the nature of the procurement activity to be undertaken • Chair scoping meetings with client as required • Work in co-operation with the Authority's client and provide information to ensure new contracts let are recorded on the Authority's contracts register • Advise on the process of extending existing contracts or contract variations • Highlight risk of extending contract without specific provisions in the tender • Inform the Authority's Procurement and contracts team about complaints and challenges in relation to procurements and work in cooperation with the Authority's client to resolve any issues • Ensure that project timescales are estimated and agreed with the client prior to project initiation
	Procurement Engagement	<ul style="list-style-type: none"> • Lead the Authority's procurement activities and engage with relevant stakeholders to maximise opportunities and compliance. • Provide a number of forums to engage stakeholders across all Authority disciplines e.g. Clinical product assessment group, procurement steering group
	Procurement Strategy	<ul style="list-style-type: none"> • Create, deliver and maintain the Authority's procurement strategy using relevant industry templates and best practice guidelines. • Ensure strategy supports the delivery of National strategies and Authority's business plans and local strategies.
	Competition Management	<ul style="list-style-type: none"> • Provide expert procurement advice to the Authority. • Provide and deliver, commercial understanding, understanding of the Authority's local issues and requirements and best practice to the Authority's procurement activities. • Implement contract management techniques.

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	Tendering & Contracts	<ul style="list-style-type: none">• Provide the Authority with a full procurement service following the appropriate Trust policy and Public Contract Regulations.• Wherever possible and practicable provide collaborative procurement to enable the Authority to benefit from wider economies of scale both locally and nationally.• Work with the Authority's stakeholders to enable the successful delivery of its procurement activity. e.g. providing and assisting stakeholders with advice and supporting template documents• Assist and challenge the Authority in the development of specifications.• Access appropriate framework agreements where they best suit the Authority's requirements.• Provide the authority with an electronic tendering and vendor management solution. Capable of supporting local tenders, European tenders, e-auctions.• Provide the Authority with a comprehensive Contract Management system. This should enable the Authority to manage and report on both procurement and commissioner contracts. The solution should store imaged copies of signed contracts and provide a contract reference.
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Transactional Procurement

Provide an outsourced solution to the Authority for the provision of transactional procurement services.

Ref	Title	Description
	Requisitions	<ul style="list-style-type: none">• Provide the authority with an electronic solution for raising and authorising requisitions in line with the Authority's scheme of delegation and spend controls capable of order consolidation multi-line requisitioning• Support multiple requisition / delivery points for the Authority.• Convert requisitions into Purchase Orders on the Authority's behalf ensuring best value is achieved and contracted suppliers used wherever possible.• Enable electronic links with suppliers for the transmission of orders and receipt of invoices.• Provide a direct interface in to the Accounts Payable ledger• Support for 3 way matching and subsequent payment of multi-PO – multi-line consolidated invoices• Enable the solution to punch-out to suppliers' websites and systems to complete the ordering process where appropriate.
	Product Catalogues	<ul style="list-style-type: none">• Provide and manage a comprehensive product catalogue solution for the Authority including regular price and product maintenance.• Enable the solution to punch-out to suppliers' websites and systems and pull back real-time information.• Work with suppliers to bring their products onto the catalogue particularly when contracts are entered into or renewed.• Assist the Authority in achieving maximum spend through catalogued items and services.• Provide rich data such as product images lead times and stock availability.
	Support	<ul style="list-style-type: none">• Provide a helpdesk to assist users throughout the PO and requisitioning process and providing advice.• Maintain in conjunction with Accounts Payable the Authority's Supplier file.

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Materials & Stock Management

Provide an outsourced solution to the Authority for the provision of a Materials and Stock Management Service.

Ref	Title	Rationale
	Materials Management	<ul style="list-style-type: none">• Provide the authority with a complete Materials Management service at locations agreed by the Authority.• The service should include the monitoring of stock and re-order levels, implementation of the service at new locations, ordering of stock replenishment on a frequency agreed by the authority.• Provision of an electronic solution to operate the solution.• Interface the electronic solution with the Authority's Finance & Procurement solution both for the placing of orders and the ability to access third party catalogue items.• Working with Stakeholders to review their ordering and stock-holding profile to assist in the innovation and improvements.
	Stock Management	<ul style="list-style-type: none">• Provide the authority with a stock management system and service at locations agreed by the authority.• Enable the Authority to value stock using an appropriate method e.g. LIFO, FIFO• Provide a solution that can automatically generate orders to replenish stock, gives real-time access to users to issue stock