

Invitation to Tender

Contract Ref: 19_20-0018T

Evaluation of the *MSK Champions Clinical Leadership Programme*

Closing Date 1st August 2019

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Introduction

Versus Arthritis has a contract opportunity to evaluate our **MSK Champions** clinical leadership programme and we invite you to submit a response to this Invitation to Tender (ITT) in accordance with this brief.

Versus Arthritis

We are Versus Arthritis. We are the 10 million+ people living with arthritis. We are the carers, researchers, healthcare professionals, friends, parents, runners and fundraisers all united in our ambition to ensure that one day, no one will have to live with the pain, fatigue and isolation that arthritis causes.

The impact of arthritis is huge as the condition slowly intrudes on everyday life – affecting the ability to work, care for a family, to move free from pain and to live independently. Yet arthritis is often dismissed as an inevitable part of ageing or shrugged off as ‘just a bit of arthritis’. We don’t think that this is OK. Building on the legacies and expertise of both Arthritis Research UK and Arthritis Care, Versus Arthritis is here to change that.

Together, we’re making real progress. But there is still a long way to go. We will continue to develop breakthrough treatments, campaign relentlessly for arthritis to be seen as a priority, challenge how people see arthritis and ensure that everyone has access to the best information, advice and support they need, whenever they need it.

About arthritis

The term 'arthritis' is an umbrella term for all conditions that affect the muscles, bones and joints. This includes rheumatoid arthritis, osteoarthritis, back and knee pain and osteoporosis (you may hear these conditions referred to as musculoskeletal or MSK conditions). Although they may be different in their pathology, the impact these conditions have on people’s lives are similar. Pain is the symptom that runs across all of them, and most people with arthritis experience pain every day and they can live with that pain for years or decades.

We have conducted extensive research with people with arthritis to understand its effect on people’s lives. Our research shows that every aspect of people’s mobility and independence can be affected by arthritis in some way. It limits their emotional life, affecting the nature of social and family relationships, it can undermine confidence and often causes low mood and depression. Many struggle financially and find it hard to stay in work.

We have also conducted research with professionals in the health and care sector who have helped us to identify key enablers and barriers to achieving positive outcomes for people with arthritis. MSK Champions is one such example of our partnership approach, recognising the barrier of a health and care system that is complex and sometimes contradictory, and attempting to manage and overcome this through improved change management and leadership skills among key individuals.

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MSK Champions

Background to the brief

Through the work of our professional engagement team, we have relationships with many groups and individuals working in the MSK health and care system who possess the relevant knowledge, skills and enthusiasm to make a positive difference for people with arthritis, and many of these people are particularly well-placed to effect change. However, these individuals committed to improving the organisation and delivery of musculoskeletal care need to be able to lead change. Yet, they inhabit a health system which is fragmented, complex and hierarchical; a system which hinders, rather than promotes, problem solving, collaboration and innovation. In a system so complex, knowledge and skills in quality improvement, organisational change management and leadership development are vital for those expected to lead and deliver improvements in care. However, the financial constraints of the NHS rarely allow for initiatives which aim to address this.

Inspired by the success of other clinical leadership initiatives such as the Diabetes UK / Novonordisk / Ashridge collaboration and the Health Foundation's Generation Q programme; Versus Arthritis is investing in the talent of individuals within the healthcare system. We are equipping those who are passionate about improving care for people with MSK conditions with the skills, knowledge and tools to lead change at a local and national level. We believe that by investing in those who understand the local environment, population needs and systems, and supporting them to develop the additional skills required, this will help to achieve improvements in care for people with MSK conditions.

Progress

In March 2018, we launched the application process for the MSK Champions programme, a prestigious leadership development opportunity for any professional involved in the design or delivery of MSK health services, for example, it is open to those working in health system administration as well as in health service delivery.

We intend to develop and cultivate a UK-wide community of multi-disciplinary learners, leaders and influencers of change in musculoskeletal health services, with the ultimate aim of improving the quality of lives for people affected by musculoskeletal conditions.

We aim to replicate the success that other third sector organisations have achieved in the 'badging' of individuals as Versus Arthritis MSK Champions. We hope that this title will indeed help to 'open doors' as has been reported, as well as enabling Champions to act as ambassadors for Versus Arthritis and raise our profile in different healthcare settings.

Together with Ashridge Executive Education, we have created a bespoke leadership initiative which takes individuals through an 18-month development programme to become champions of change for improvement in the musculoskeletal care system.

The first multidisciplinary cohort of 14 MSK Champions started their programme in November 2018 and the second cohort of 14 started in June 2019.

All successful applicants were recruited through a highly competitive process where they had to demonstrate their experience of, and commitment to, improving care for people with musculoskeletal conditions, as well as their personal leadership qualities and suitability for developing skills in this area.

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Programme activity

The Champions will be supported and coached to develop their personal leadership skills and to drive forward a service improvement project (of their choice) in MSK care, either with a local or national focus.

The programme runs for 18-months and includes:

- Five residential learning modules at Ashridge Executive education business school: ashridgehouse.org.uk
- Four action learning sets (facilitated small group online sessions between Champion peers)
- Access to an online forum to discuss ideas and connect between Champion peers
- One-to-one support from an experienced mentor
- Access to Patient Insight Partners at Versus Arthritis
- Access to other support and guidance from Versus Arthritis

Expected outcomes and impacts

We have conducted an internal theory of change and logic modelling exercise. The programme's designated outcomes and impacts are:

- Leadership and influence to change
- Professional community that lives on (network connections and leadership movement)
- Local system improvements
- Improvements to the MSK care ecosystem
- Improvements in care for people with MSK conditions

A range of personal development KPIs and other performance measures are already being collected by Ashridge and Versus Arthritis, including some which relate to the outcomes and impacts.

Contract Overview

We are looking to appoint a suitably experienced and qualified professional organisation to develop and implement a **formative evaluation** based on a review of the programme to date, and to report on the findings. The contract will commence in September 2019 and is expected to report by March 2020 (at which point cohort one will be largely finished and cohort two will be well-underway) to inform the charity's intentions regarding the future of the programme and to advise on plans for a potential cohort three (provisional autumn 2020 start) and more cohorts as appropriate.

Evaluation aim

The aim of this evaluation is to understand the strategic importance of the MSK Champions programme. This will be complemented by an operational review of the programmes progress and initially explore the programmes intended outcomes.

Scope of Services

The evaluation is expected to assist Versus Arthritis to **reflect strategically** on the programme to date. The evaluation will report on stakeholders' views (internal and external) regarding the continuing relevance and strategic positioning of the MSK Champions programme. The evaluation should make recommendations regarding next steps for the charity and possible future investment.

We are also keen to understand **how the programme is progressing operationally**, how delivery mechanisms are working, what is working well / less well, learning generated through the programme, and highlighting successes. The evaluation should make recommendations to support continuous operational improvement.

This is not a 'full' impact evaluation in that we do not expect it to produce conclusive evidence aims to explore the dual impact of the longer-term programme on personal development and community leadership but also the aggregate effects seeing as though the two live cohorts will not have finished their courses by the time this evaluation is produced. Instead, we expect the evaluation to provide independent scrutiny and an **indicative assessment of** local projects. It should explore **the programme's intended** expected **outcomes and impacts** at this important juncture. It will explore the programme's achievements to date, test key hypotheses, factors affecting contribution / attribution and unexpected outcomes, and provide an initial perspective report on programme additionality and value for money as far as highlight programme achievements. We do however, acknowledge that this will be a preliminary exploration given the project is possible still being established.

The evaluation will need to cover the dual aspects of the Champions' personal development and community leadership, and the aggregate effects of the Champions' service improvement projects. It should also provide some initial commentary on the potential scale of wider effects, e.g. economic, social and health / wellbeing where applicable.

Evaluation questions

The evaluation is expected to address the following questions.

Strategic review (we view this as the central strand of the evaluation):

- **Purpose:** Is the programme rationale still valid (as of late 2019 / early 2020)? Are the aims and objectives of the programme still relevant and appropriate? Does the programme still align with the charity's ambitions? How closely do the programme goals align with external strategy (e.g. NHS Long Term Plan)? How is the programme being shaped by people affected by arthritis?
- **Context:** What new evidence exists to inform the programme strategy? What have been the key internal / external factors affecting the programme since it started? How is the programme fitting into the healthcare landscape?
- **Sustainability:** Is the programme developing into a sustainable model? Is there income generation potential within this programme?

Operational review (we view this as the secondary strand of the evaluation):

- **Quality:** Does Ashridge offer a consistently high-quality and relevant leadership programme? Are resources being used effectively? Are delivery mechanisms appropriate? What are the key enablers? What are the operational barriers / challenges?
- **Reach:** What are participants motivations for joining the programme? Are we attracting a suitable range of professionals from the health system into the programme? What are the barriers and enablers to participating?
- **Development:** Are team members / programme partners (Versus Arthritis and Ashridge) clear what the programme is trying to achieve? What have we learnt by creating a multidisciplinary cohort? What additional opportunities occurred outside of the programme for Champions and partners? Which other stakeholders (intended and unintended) were involved in the wider programme delivery and how?
- **Satisfaction:** What is the experience of the Champions? Is it meeting their development needs? What changes can we make to enhance their experience? What has worked particularly well? What additional training needs have the Champions recognized? What additional support / resource needs have the Champions recognized?

Assess and evaluate impact to date (we view this as indicative at this stage but necessary to inform the strategic and operational strands):

- **Expectations:** To what extent are the outcomes and impacts expected for the programme realistic? Is the programme broadly on track to achieve its intended outcomes?
- **Achievements:** What achievements have occurred so far? Have the MSK Champions developed a sense of community? What effect, if any, has the programme had on the wider MSK health landscape to date?
- **Context:** To what extent are outcomes / impacts proving attributable to the programme? What external factors are significant? What are the differences in impact between locations and individuals? How do these align with other internal / external factors?
- **Additionality:** What is the added value of the programme to participants and stakeholders? Does the programme represent value for money for the charity? What would happen if the programme didn't exist?
- **Wider effects:** What are some of the wider emerging economic / social and health / wellness effects? What unintended or secondary effects appear to be occurring?

Evaluation audiences

Through this evaluation, we want to demonstrate our understanding of the challenge (complexity of system change and benefits / challenges of investing leadership to achieve change), our approach to addressing this, and our achievements so far. If the findings are positive, we want to use them to inspire future involvement and investment.

The evaluation findings are expected to be of interest to several groups:

- Primary audience: Versus Arthritis

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- Informing Senior Leadership team and Board of Trustees of the programme's contribution to achieving the charity's mission and to support investment decisions
- Informing relevant Heads and Directors to shape the charity's broader professional and health services improvement offer, and how the MSK Champions programme is positioned within this
- Supporting the professional engagement team with an independent assessment of the programme's strengths and opportunities for improvement to support further development
- Secondary audience: Raise awareness among...
 - Stakeholders in the health sector; executive sponsors / future executive sponsors, potential Champions, programme contributors and advocates
 - Wider MSK health and care sector to increase recognition and influence investment
 - Third sector to increase recognition and influence investment
 - Potential future investors – corporate partnerships / major giving / key Versus Arthritis partners
 - Programme participants (we intend to share the headline evaluation findings with programme participants)
 - People with arthritis to know about and (if they choose) be connected with service improvement in their locality

Key deliverables

We expect the evaluation to produce the following outputs:

- Evaluation workplan – refining the proposed method statement into a sharable workplan
- Final report – highlighting programme achievements and presenting operational and strategic recommendations by March 2019
 - A small number of case studies or individual vignettes included in the final report to provide qualitative narrative in support of the evaluation findings, which could also be used by the programme team as standalone examples.
- Presentation of evaluation findings to Versus Arthritis and associated slide deck

Out of Scope

The evaluation is not expected to collate or provide detailed commentary on participants' satisfaction data which is already collected and updated internally on a rolling basis.

The evaluation is not expected to produce a detailed impact assessment for the programme. Instead, we expect this evaluation to provide a solid foundation for any potential further research into the programme impact to be conducted at a later point in time.

Data Permissions

As an evaluation partner you will have access to:

- Anonymised satisfaction data provided by participants

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- Other participant feedback and KPIs collated by Versus Arthritis and Ashridge
- Contact details of current and previous MSK Champions
- Contact details for Ashridge Executive Education members of the Faculty programme team
- Contact details for a variety of internal and external programme stakeholders

You will be expected to act as a 'data processor' on behalf of Versus Arthritis and you will need to protect any personally identifiable data which is shared with you in line with GDPR.

Terms and Conditions

Versus Arthritis's standard Terms and Conditions will apply (see Appendix 1)

Versus Arthritis' supplier expenses policy will apply (see Appendix 2)

Tenderers must be able to demonstrate they can conform to relevant statutory obligations:

- General Data Protection Regulation (2018)
- Modern Slavery Act (2015)

Instructions to Bidders

Your nominated contact for this procurement is:

Name: Tracey Slack

Job title: Senior Procurement Officer

Bidders are required to submit a written proposal outlining your approach to fulfilling this contract on or before **16:00 on 1st August 2019**.

Written responses should be **up to six A4 pages** and should include the following information:

- A brief overview of your organisation and your suitability for this brief
- Your understanding of the main issues and challenges for this evaluation
- Your relevant experience applicable to this brief, particularly related to evaluating leadership and healthcare initiatives
- Names and pen portraits of your proposed evaluation team members, identifying relevant skills / experience / technical competencies (CVs can be included separately outside of the page limit)
- Short summaries of two relevant projects you have undertaken in the last four years, ideally with similarities to MSK Champions, plus referee details for each of these
- Your proposed approach to evaluating the project, including details of proposed evaluation methods / tools.
- Draft proposed timelines and main phases / stages

In addition to your written proposal, the following should be completed:

- Form B - Pricing schedule
 - Estimated cost of your outlined approach and itemised by phase / stage

- Plus details of any additional benefits or added value you can offer Versus Arthritis. (e.g. pro-bono, charity discounts against standard rates, etc)
- Plus completed rate card detailing the team roles and corresponding charges you would allocate to this contract
- Commercial Questionnaire (to be conducted via In-Tend portal)

Bidders are advised that this procurement will be conducted entirely through the In-Tend e-procurement portal and the Charity will not take any responsibility for non-receipt of documents and/or communications submitted outside of this route.

NB. The max file upload into the portal is 20MB. We normally recommend a working individual file size limit of 20MB.

Any issues relating to the portal should be directed for the attention of your nominated contact at procurement@versusarthritis.org

Tenderers are required to inform the Nominated Contact of any errors, omissions or ambiguities in the Tender documentation by **16th July 2019**.

Tenderers are strongly advised to familiarise themselves with the content of the Tender documentation and all supporting information. It shall be the Tenderer's responsibility to request clarification from the Nominated Contact where necessary to ensure they fully understand the requirement of the Contract.

Tenderers are advised that in order for this process to remain fair and transparent, all queries or questions in relation to this Tender are to be requested in writing by email to the nominated contact no later than **24th July 2019**.

Any questions received after this date will not normally be accepted and response will be at the discretion of Versus Arthritis. Tenderers should identify in their request anything that is of a commercial or sensitive nature. All questions (with the exception of those deemed commercially sensitive) will be anonymised and collated and a full response to ALL questions will be circulated to ALL tenderers by **25th July 2019**. Any questions deemed as commercially sensitive will receive a direct written response.

It is the responsibility of Tenderers to obtain for themselves at their own expense any additional information necessary for the preparation of their Tender and the cost in preparing their Tender submission shall not be reimbursed.

All information supplied by the Charity in connection with the Tender shall be treated as confidential by Tenderers except that such information may be disclosed so far as is necessary for the purpose of obtaining guarantees and quotations necessary for the preparation and submission of Tenders.

Submission of Documents

Tenderers are required to return Form A – Notification of Intent by **22nd July 2019**.

Tenderers shall submit ONE electronic copy of their written proposal and Form B Price Schedule through the In-Tend portal no later than **16:00 on 1st August 2019**.

Costs of preparing the response

All costs relating to the preparation and submission of a response are the sole responsibility of the bidder and cost relating to any submission will NOT be reimbursed

Confidentiality

Except as required for the preparation of a proposal, bidders must not, without the Charity's prior written consent, disclose to any third party any of the contents of the ITT documents. Bidders must ensure that their employees, consultants and agents also are bound and comply with this condition of confidentiality.

Acceptance of these Conditions

By submitting a response to this ITT, bidders are deemed to have acknowledged and agreed to the conditions set out in this ITT: Contract Reference 19_20-0018T

Any email correspondence relating the tender should bear the contract reference in the subject information section of the email.

Tenderers shall fully complete, sign (where applicable) and return the following documents to the nominated contact by **1st August 2019**:

- Written proposal document
- Commercial questionnaire (via In-Tend)
- Form B: Pricing Schedule bidders must complete our template failure to do so may invalidate your bid.

Tenders received after the stated closing time and date will only be considered at the absolute discretion of Versus Arthritis

Any supporting information shall be indexed with reference to which question and/or section of the Tender it relates. Failure to do so may affect the evaluation score

The inclusion of general marketing and company literature or any separate statement of reasons for selection is not required and will not be considered in the evaluation of the Tender. Tenderers shall not include in their Tender any information beyond that requested in the Tender.

Tenders shall remain valid for a period of at least one hundred and twenty (120) days following the stated closing date.

Tender prices shall be exclusive of VAT.

The Charity is not bound to accept the lowest or any Tender submitted and reserves the right to terminate the Tender process without reason. The Charity reserves the right to divide or omit any portion of the Tender as appropriate. Tenderers are requested to state that their prices remain constant irrespective of any possible division or omission.

Tenderers are reminded that the Charity is using a procurement process with an Invitation to Tender, i.e. the Contract is not subject to negotiation. If a Tenderer repeatedly attempts to enter into negotiations regarding the Contract then the Charity shall be entitled to exclude the Tenderer from the Tender process.

If the Charity has reasonable grounds for suspecting any collusion has occurred between Tenderers, those Tenderers shall be excluded from the Tender process.

Any Tenderer that offers or attempts to offer any inducement, fee or reward to any officer or employee of the Charity shall be excluded from the Tender process.

The Charity reserves the right to exclude any Tenderer that fails to comply fully with the requirements set out in these instructions, or which makes any misrepresentation in supplying any information requested.

Scoring Procedures

All responses to this opportunity will be scored based on the most economically advantageous proposal that meets the needs of the Charity. This will involve an assessment of all the elements identified below:

- Quality and Capability (40%):
 - Approach to meeting the brief
 - Research Methodology
 - Timescales for deliver
 - Approach to account/project management
 - Understanding of project requirements
- Technical Capacity (30%):
 - Experience in relevant healthcare research
 - Case Studies
 - Expertise of allocated team
- Cost and Value (20%):
 - Rate cards
 - Any proposed added value
- Commercial Capacity (10%) will be measured against an assessment of the responses to the commercial questionnaire and we reserve the right to conduct a commercial financial check on all shortlisted organisations.

Shortlisting Process

All proposals will be independently reviewed and scored by a panel comprising of the following stakeholders:

- Tracey Slack, Senior Procurement Officer
- James Dunphy, Senior Programme Lead (MSK Champions)
- Kate Croxton, Head of Professional Engagement
- Amelia Hall, Evaluation Manager

The Charity will shortlist to a max of three bidders and the shortlisted bidders will be invited to discuss their proposal in further detail in the form of a presentation.

Presentations

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The presentations will be held at our London Office, Saffron House, 6-10 Kirby Street, London EC1N 8EQ on **16th August 2019**.

The presentations are a critical aspect of the selection process as they allow us to focus on key aspects of the proposals, query any elements that need clarity and meet with key staff, who will be working with us. It is therefore important that bidders ensure the availability of key staff on this date as alternatives cannot be offered, due to the availability of the panel and internal resources.

Presentations are expected to be around one-hour in duration and shortlisted bidders will be provided with further details about the presentation including an appointment time once the shortlisting has been concluded on **7th August 2019**.

The presentation will be evaluated and scored against elaborated details of the set criteria identified in this document. This should include details of proposed approach, examples of relevant experience and presenting a convincing case of proposed services.

On conclusion of the presentation, scores from all stages will be combined and the highest scoring bid will be taken forward to contract award.

Unsuccessful shortlisted bidders will be notified w/c **22nd August 2019** and given the opportunity to request feedback on their proposal once the contract negotiations have been finalised after **26th August 2019**.

Invitation to Tender Timetable

The following timetable sets out the anticipated timescales for the Invitation to Tender process:

Stage	Date	Time
Issue Invitation to Tender documents	15 th July 2019	
Receipt of Notification of Intent (Form A)	22 nd July 2019	16:00
Deadline for receipt of questions	24 th July 2019	16:00
Responses to questions	25 th July 2019	16:00
Receipt of written ITT response including: Commercial Questionnaire- via the In-tend portal Form B Price Schedule	1 st August 2019	16:00
Notification of shortlist and issue of presentation brief and Instructions	7 th August	16:00
Supplier presentations*	16 th August 2019	
Advise bidders of any clarification	19 th August 2019	
Submission / Sign-off of preferred bidder	20 th August 2019	
Communication of results	22 nd August 2019	16:00
Contract negotiation with preferred bidder	w/c 26 th August 2019	
Contract start	w/c 2 nd September 2019	

*Tenderers shall ensure availability throughout the above periods should they be successful in being short listed for the Site Visit and Interview/Presentation stages (if applicable).

We reserve the right to amend any of the dates in this timeline. The date of the presentation, once fixed cannot be amended and bidders should ensure their availability

Tenderers will be notified of the results as soon as possible. Tenderers are instructed not to contact the Charity prior to the notification of the result.

Appendices

List of appendices to be sent as files / folders with this tender:

- Appendix 1 – Standard Terms and Conditions.
- Appendix 2 – Supplier Expenses Policy
- Form A – Notification of intent
- Form B- Pricing Schedule