

Apprenticeship Procurement Toolkit Guidance for Employers



Introduction

Procurement can seem daunting, but it doesn't have to be. This toolkit has been designed to provide guidance for healthcare employers, with support to navigate the procurement process and an overview of the various options available nationally.

Background

The system for the funding and procurement of apprenticeship training changed in May 2017 with the introduction of the Apprenticeship Levy. Employers with a pay bill of over £3 million each year are now required to make an investment in apprenticeships to the value of 0.5% of their annual pay bill. The government has also introduced new statutory targets for large public sector bodies to contribute to the goal of achieving 3 million apprenticeships by 2020.

Public sector bodies with more than 250 employees will now need to ensure at least 2.3% of their workforce are new apprenticeship starts each year.

Why is procurement necessary?

Previously, employers could enter into arrangements with their chosen training providers for apprenticeship provision. With the introduction of the Apprenticeship Levy and the potential financial value of contracts for training provision, a formal procurement process is advisable to ensure compliance with NHS Procurement Rules.

Glossary - Procurement Speak for Non-Procurement People

ATP – Apprenticeship Training Provider

DPS - Dynamic Purchasing System - an electronic procurement system used by a contracting authority to purchase commonly used goods, works or services

EPA – End Point Assessment - EPA is the assessment process for apprenticeship standards

EPAO – End Point Assessment Organisation – a company offering EPA for apprenticeships

ESFA – Education & Skills Funding Agency

HEI – Higher Education Institution or University

ITT – Invitation to Tender - initiating step of a competitive tendering process in which suppliers are invited to submit bids

OJEU – Official Journal of the European Union – this is the publication in which all tenders from the public sector which are valued above a certain financial threshold according to EU legislation must be published

PQQ – Pre-Qualifying Questionnaire - a questionnaire that suppliers or contractors must fill out when bidding for work or applying for an approved supplier list/DPS

RoATP – Register of Apprenticeship Training Providers - organisations that are approved to deliver apprenticeship training for employers using the Apprenticeship Service

SFI - Standing Financial Instructions – these detail the financial responsibilities, policies and procedures adopted by an employer

SSQ - Standard Selection Questionnaire - a questionnaire that suppliers or contractors must fill out when bidding for work or applying for an approved supplier list/DPS

STP - Sustainability and Transformation Partnerships – there are 44 STPs nationally looking at shared proposals to improve health and care

Standard NHS Procurement Rules

According to the Standard NHS Procurement Rules, all spend over £25,000 should be advertised on the government's Contracts Finder service, available at www.gov.uk/contracts-finder.

Each employer has different requirements under their Standing Financial Instructions (SFIs); guidance should be sought from internal procurement teams if further information is needed about individual SFIs.

All spend over £118,000 (non-Foundation Trusts)/£181,000 (Foundation Trusts) must be advertised in the Official Journal of the European Union (OJEU).

The use of a framework or Dynamic Purchasing System (DPS) ensures procurement compliance and can reduce timescales for procuring apprenticeship training. It also removes the requirement for you to advertise in OJEU.

The Apprenticeship Levy is public money and there is therefore a legal requirement for organisations to achieve value for money through fair, open and transparent competition. This requirement exists even for services that fall under the Light Touch Regime.

Public sector bodies will need to comply with the Public Contracts Regulations 2015 when selecting a provider or assessment organisation from the approved registers, as well as adhering to their own organisational Standing Financial Instructions. Please note, *The ESFA register of training providers and the 'Find Apprenticeship Training' service are not compliant procurement routes.*

Why not contract directly with a known and trusted supplier?

If employers continue using the same provider for services, how can they be sure they are getting the best value for money – including the best quality?

All of the national DPS/Frameworks were established to build in quality assurance through the meeting of minimum criteria. The prices per apprenticeship are capped funding rates which could be reduced by a tender negotiation process. This allows for more provision to be delivered through the levy pot available to an organisation.

Many apprenticeship standards are so new that providers do not yet have a track-record of successful delivery. You could however look at the relevant framework achievement rates as a guide. A mini competition forces contracting authorities to think more thoroughly about their specific requirements and what is important to them in terms of quality and delivery and hence greater value is derived from the resulting contract.

National Procurement Options

Here is an overview of the different procurement systems currently available nationally for the NHS. Employers may already be working with one of the organisations for other procured services, so it is advisable to liaise with internal procurement teams as part of deciding with whom to engage.

Crown Commercial Service (CCS)

CCS, in collaboration with Civil Service Learning (CSL), has created a framework agreement which will support public and third sector bodies to access training and apprenticeship services from apprenticeship training providers who are registered with the Education and Skills Funding Agency and that meet the government's standards.

The apprenticeships framework is available to all central government departments, their arm's length bodies and the wider public sector. This framework will ensure public bodies achieve best value, buying as a single customer, whilst enabling them to access their levy funds to support their workforce planning strategies and meet their apprenticeship targets. The framework avoids government bodies having to carry out multiple procurement exercises, saving staff time and money.

Prices on the framework are capped, meaning public bodies will only pay the agreed price and no higher. Public bodies will not have to carry out their own lengthy and resource-intensive procurement processes. CCS manages the framework, avoiding

duplication of effort among local commercial teams. On average, the discounts secured under the framework are 22% below the cap.

This framework covers 12 common areas of apprenticeship subjects across the public sector. Although it does not include healthcare specific apprenticeships, CCS is currently planning a procurement refresh, which will put in place a replacement commercial vehicle later in 2018. The new commercial vehicle will offer access to a broader range of apprenticeship training programmes, including healthcare specific, and an increased choice of training providers, than what is provided on the current Framework Agreement.

<https://ccs-agreements.cabinetoffice.gov.uk/contracts/rm3823>

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NHS Shared Business Services (SBS)

This Framework aims to provide employers access to a broad range of Apprenticeship Providers to meet the increasing demand for apprenticeships and enable employers to purchase high quality apprenticeship provision using their levy. It allows employers to either run a further competition or to award directly to their preferred supplier.

Currently, the NHS Shared Business Services Apprenticeship Training Services Framework comprises circa 200 suppliers, with this number growing as new suppliers are approved to join.

All figures correct as of April 2018.

Suppliers on the Framework are split by their ability to provide Apprenticeship Standards and

Apprenticeship Frameworks. Suppliers are also split between ten separate geographical regions.

The framework is quick and easy to access, with employers being charged no fee to access the agreement. When employers sign up to use the framework, they are given documentation to help them with their procurement, and access to a number of procurement professionals they can call to discuss their procurement process, including the direct award route to market.

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NHS London Procurement Partnership (LPP)

LPP works on a national footprint with NHS organisations to make the most of the purchasing power of the public sector to maximise investment in frontline services. LPP helps deliver the highest quality services while at the same time ensuring value for money. LPP encourages collaboration among public sector organisations and currently works in collaboration with acute, mental health and community trusts, Clinical Commissioning Groups, Community Health Partnerships, and a number of non-NHS organisations. LPP is also part of the NHS Collaborative Procurement Partnership, working in collaboration with other NHS Procurement Hubs.

Recognising the need for all employers to have a legally compliant route to market, Health Education England, working on behalf of NHS Trusts in London, approached LPP to explore the options and recommend a compliant solution. The recommendation was to create a DPS to which apprenticeship training providers can apply at any time over the duration of the DPS. Health Education England advised LPP on the structure, the minimum requirements an apprenticeship training provider must meet, and the mini competition documents. This way, quality was built into the process.

Providers who are awarded to RoATP at a later stage are still able to apply to the DPS. The DPS went live in April 2017 and is managed on an on-going basis by LPP.

206 approved apprenticeship providers are awarded to the DPS (not all suppliers are awarded for all categories/lots) with new applications every week. LPP can work with employers and their incumbent/local suppliers to ensure that they are listed before any competition process is undertaken.

NHS Commercial Solutions and East of England Collaborative Procurement Hub are promoting the LPP DPS to their members.

In its first year, contracts awarded equated to more than 6000 apprenticeships being delivered nationally. This number is growing all the time. The initial 22 apprenticeship categories have increased to 31, and the framework scope expanded to include End Point Assessment Organisations. New categories can be added to the scope of the DPS as required.

All figures correct as of April 2018.

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Yorkshire Purchasing Organisation (YPO) launching 1st August 2018

YPO have spent the last 12 months creating a solution that will support the needs of the public sector when procuring apprenticeship standards. The framework will be national but split into regions of the UK.

They have held supplier and customer engagement events that have included attendees from a variety of providers, local authorities, police forces, fire & rescue, NHS Trusts and more.

The events and marketing intelligence they have carried out over the last few months has allowed them to create a flexible solution to meet the needs of the public sector.

The framework is created in 3 tiers:

- Tier 1 – Regions
- Tier 2 – Routes (as prescribed by the Institute for Apprenticeships)
- Tier 3 – Standards

The framework will list all standards that are approved on the Institute of Apprenticeships website by the date the framework is published.

Any new standards will be added on a quarterly basis and providers will have the ability to tender to be on the framework on a quarterly basis.

Training Providers will be able to tender across multiple lots and at various times throughout the duration of the framework. The solution is aimed to be flexible to meet the constantly changing needs of the current apprenticeship market by supporting new providers and providers wishing to deliver on new standards.

The tender will be published in April 2018 and the framework will be live from 1 August 2018. The aim is to constantly grow the standards available through the framework and to help support the developing provider market by allowing them to bid on a quarterly basis.

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Salisbury Managed Procurement

Salisbury Managed Procurement is part of Salisbury NHSFT, and specialises in providing professional services to NHS and other public sector bodies. Salisbury has a long history of developing and providing innovative and customer responsive services across the NHS, supporting both the Peninsula Purchasing and Supply Alliance and Southern Procurement Partnership collaboratives, as well as partnering Crown Commercial Services and others.

From early engagement with STPs, Trusts, ESFA and Health Education England, the Salisbury Apprenticeship DPS is a fully managed service, at

no cost to client organisations at any point. Salisbury works as an integral part of their clients' Human Resources and Procurement teams to help them develop their apprenticeship plans, deal with the on-boarding of existing suppliers, and conduct the procurement phase using a supplier self-score system which makes for quicker evaluation. Typically, even a large requirement can be turned around within three weeks, and Salisbury then assist with bidder presentations, contract issue and subsequent feedback. New requests for competition typically are issued to the market with 48 hours, and Salisbury also work with both incumbent and potential new providers to ensure a good tender response and to develop new innovations in the market.

Both employers and STPs have recorded significant procurement activity savings by asking Salisbury to carry out their apprenticeship procurements, one STP having recorded over £35,000 in procurement time savings alone. In the words of a client organisation, "it's like having a whole procurement team to yourself".

Salisbury also specialise in new training outside of the levy, having supported the commissioning of bespoke degree modules in mental health, dementia and social care.

They are currently working with over 40 NHS Trusts and local authorities, have good links with HEE and the National Apprenticeship Service, and are an integral part of a number of STP apprenticeship and workforce groups, having delivered over £20m in contract value and enabled over 3000 students to start their apprenticeship journey.

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Case Study LPP

Carly Larkin
Apprenticeship Project Lead

East Kent Hospitals University NHS Foundation Trust

Employees 8000+

Public Sector Target 184 per year across 5 sites

Levy £1.3 million



Carly has inadvertently become somewhat of a procurement expert after three waves of procurement for her Trust. With an annual £1.3 million levy pot to spend, she recognised the importance of having a robust process in place. As a result she formed a Levy Steering Group at the beginning of the new procurement process with key stakeholders from the Finance & Procurement teams to utilise their expertise. She also recognised that Further Education & Apprenticeship knowledge was vital to be able to tailor and adapt the tender specifications for each individual programme. As most training providers will come in at the funding cap, it is vital to emphasise what quality measures are expected and what added value the training provider will add as part of the contract

Best practice & lessons learned

Working in partnership with NHS Commercial Solutions, the Trust chose to use the NHS LPP DPS system. The first wave of procurement took place in May 2017 for Business Administration, IT, Assistant Practitioners, Healthcare Support Workers, Pharmacy Services and Healthcare Science. Two tender documents were produced to ensure the Assistant Practitioner tender was focused on the HEI criteria. The further tender document encompassed all the other training needs, broken down into individual categories with desired levels to ensure a clear and effective evaluation process was in place. Carly advises to make it very clear in the wording of your

specification if you want only one provider to deliver all categories, or whether you will be awarding different providers individual categories. You should also be clear whether one provider is expected to offer all levels required, as this may prevent some providers from bidding.

To formulate the specific requirements for the tender, Carly looked at service area training plans plus CPD need, and mapped these to available apprenticeships, speaking to managers to get an idea of potential numbers. She used an estimated figure for the tender but clearly asked in the specification how they would accommodate growth.

Carly advises to: agree and finalise exactly what you want on your specification documents; be specific; don't be afraid to amend the documents; keep it simple and don't overcomplicate it; be clear on subcontracting and what is acceptable to you; be explicit around delivery models you would prefer, such as block release, day release or work-based learning. It is also a good idea to ask providers to include a breakdown on how they plan to spend the funding band, so you can ensure you are getting the best value for money. Be sure to weight added value highly in your tender, which could include, for example: a full and free recruitment service for new staff; free access to venues; work-based delivery; free apprentice mentoring training - to name just a few.

Their second wave of procurement was for Leadership & Management Levels 3 and 5 in October 2017. The third wave was for 70 Nursing Associates over a 3 year contract, as HEIs are much more likely to bid for longer-term contracts. Lessons were learnt from the previous two waves, so this was a much quicker process, starting in late January 2018 with the intention of having the contract awarded by mid-March. Qualifying criteria at initial expression of interest stage included: being registered with the NMC to deliver Nursing at Foundation Degree level and above; being registered to deliver the Nursing Associate Apprenticeship with the NMC on the RoATP; being able to provide training venues that are no more than 15 miles from any Trust site.

What does good look like?

In bids

- Bidder pays attention to the questions and answers them specifically, paying attention to detail and not just cutting and pasting answers!
- Bidder keeps to the word count but includes the key points
- Look for how the bidder would support organisational values and beliefs
- Look for the value added – going above and beyond the minimum criteria

In reality

- Training providers taking the time to get to know the employer and offer partnership working and flexibility
- Look for high quality providers - verify their Ofsted grades, look at their achievement and success rates, plus employer and learner satisfaction scores, all of which are in the public domain. Don't just take their word for it!
- Be clear about expectations of the winning bidder
- Training providers offer bespoke packages (not off the shelf) and flexible delivery models
- Employer Responsive – communication and regular progress updates are vital

- Locality – the training provider offers good training provision across the appropriate geographical patch
- Pastoral support and additional support for learners with special educational needs and disabilities
- Access to hardship funding to support apprentices
- e-Portfolio – the training provider offers tracking, reporting and training for managers on the system
- New staff versus existing staff – how does the training provider engage existing staff? What are the details of the on-boarding experience for new recruit?
- Screening and recruitment service for new recruits
- Training providers should allow the option for an employer to deliver elements of a programme themselves if required, such as the Care Certificate. In Carly's case, the employer agreed to deliver parts of the pharmacy apprenticeships under the £100,000 subcontracting limit.

Carly's top tips for painless procurement

- Take ownership; recognise the value of the process
- Engage with Procurement and Finance teams and establish a working group for advice and guidance
- Take the time to tailor the specification and accompanying documents and check, check, check it again!
- Start small and grow! Establish a stable provision first
- Make sure there is a robust quality assurance and evaluation process in place
- Important lesson learned - the final evaluation document is a legal document which can be shared, so be mindful that any feedback could be shared with the providers if there is a challenge!

Mini Competition Guidance

Whichever procurement option is adopted, here are some key points to bear in mind:

- It is important to take the time to read and amend any tender templates. Simply issuing the documents unchanged will not suffice as they will not reflect the organisation's specific requirements.
- Apprenticeship Leads should work with their Procurement teams in order to run the mini competition process. They could be internal or outsourced.
- Thought needs to be given to planning the total requirement for apprentices across the whole organisation for a given period so that, as far as possible, all requirements are captured within the mini competition.
- Employers should plan in advance when the mini competition evaluation will take place and who will be evaluating the responses.
- Contracting Authorities must allow a minimum of ten days for tender responses. These can be run on the authority's own e-Tendering platform.
- A mandatory criterion for any mini competition will be that the providers are listed on the ESFA register (RoATP) as a main provider. Do not assume that a provider is on the RoATP just because they have submitted a bid! Some employers have been caught out by this.
- Employers will need to independently verify any claims made in a bid such as Ofsted grade, achievement and success rates, employer and learner satisfaction scores.

Things to consider for the tender specification

- Be specific about the requirements. Consider whether you want to specify, for example, frameworks or standards, day release or work-based delivery, qualifications or EPA only.

- Recruitment - what is expected from the chosen provider in terms of support for recruiting new staff? Is it expected that they support with shortlisting and pre-screening? What about DBS checks and references?
- New recruits and existing staff – ask the provider to detail the on-boarding and induction process for both groups.
- Added value – what else can the provider offer as part of the programme? For example, mentoring training for managers, access to e-learning.
- Skill set of training staff – ask to speak to the trainers who will be delivering the education, not just the business development team!
- Ofsted – what is their grade and when were they last inspected?
- Achievement/success rates – compare these for each programme against the national average. The 2016/17 data is available here: <https://www.gov.uk/government/statistics/national-achievement-rates-tables-2016-to-2017>
- Learner satisfaction and employer satisfaction scores, available at <https://www.gov.uk/government/collections/fe-choices> – these give a good indication of quality.
- All data is not comparable! Take into account the learner and employer numbers against the satisfaction score. For example, a learner satisfaction score of 100% may only be for four learners who completed the programme.
- Employer feedback and testimonials –ask for references from employers the provider is currently working with, and speak to colleagues in other healthcare organisations.
- Ask for a tailored bespoke programme, not just the standard off-the-shelf delivery
- Ask for an outline of the learner journey and the scheme of work.

- 20% off-the-job training – ask how this will be evidenced and what plans the provider has to ensure this is not prohibitive to the success of the programme.
- Progress reviews and workplace assessments – ask the apprenticeship training provider to outline their process for this.
- End Point Assessment and resits – ask whether retakes are included in the price quoted. If so, how many?
- Contract management – there may be a significant number of contracts between the employer and the awarded training provider that will need managing. This should be outlined up front with clear expectations from all parties. Ask the training provider to specify their response times to any queries, and provide an outline of their complaints and escalation process.
- Ask the training provider to indicate KPIs for learner progress and achievements such as Functional Skills. It will not suffice to say Functional Skills will be front loaded; ask for a specific month in the learner journey.
- Remember the importance of re-checking a training provider's claims at ITT stage, such as their achievement rates and Ofsted grades.

Partnership Delivery

Partnership delivery is a potential income generation source. Employers interested in this model should state this explicitly in the tender documents. Employers could get paid for delivery of elements of the apprenticeship that they already carry out, such as the Care Certificate. Training providers will be glad of the expertise, especially in clinical areas.

There are three options available for partnership working:

The first is to become an Employer Provider. The second is to become a Supporting Provider, enabling an employer to deliver up to the value of £500,000. Both of these options require the employer to be on RoATP and have a robust infrastructure to support the delivery.

The third option is to become a subcontractor and deliver elements of the apprenticeship programme up to the value of £100,000. For this option the employer is not required to be on RoATP.

Typical Procurement Process Timeline

Action	By when	By whom
NHS employer to agree specification and Invitation to Tender (ITT) documentation	Day 1	Employer
ITT documentation to be issued to all Apprenticeship Training Providers (ATPs) in the lot	Day 7	Employer
ATPs to submit tender responses	Minimum 10 days	ATPs
Employer evaluates responses	Day 20	Employer
Employer seeks internal approval of contract award	Day 30	Employer
ATPs notified of outcome and voluntary standstill period undertaken	Day 30	Employer
Employer concludes standstill and enters contract with ATP	Day 40	Employer/ATP

Collaboration between Contracting Authorities

It is possible for multiple employers to work together and run one mini competition collaboratively. An example of this is included on page 13.

The advantages of working collaboratively are:

- Only one set of mini competition documents needs to be produced, making it less time intensive
 - The greater combined volume of apprentices required may be more attractive to training providers and HEIs
 - One tender response per provider means less “mini competition fatigue”, resulting in more and potentially better quality bids
 - Evaluation of the bids can be split between employers and can therefore be quicker
- Potential difficulties are:
- It requires forward planning across all the parties involved in terms of specific delivery requirements and apprenticeship numbers within each category
 - All parties must be fully committed to the process
 - Employers will need to work together to develop a joint specification that includes requirements of all parties. This may include Primary Care and Social Care employers too
 - Employers will need to coordinate the evaluation of all bids and reach a consensus when scoring
 - Large volume requirements may freeze smaller suppliers out of the market
 - On conclusion of the mini competition, each employer should have its own individual contract with the provider(s) to overcome any potential employer-specific supplier grievances.

Case Study STP Level Procurement

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Widening Access &
Apprenticeship Lead

Gloucestershire Care Services NHS Trust
Staff 2700
Public Sector Target 61
Levy £300,000



Gloucestershire Care Services NHS Trust has partnered with 2gether NHS Foundation Trust and Gloucestershire Hospitals NHS Foundation Trust as well as the local CCG to procure for apprenticeships together using the LPP DPS. Karen had no knowledge of procurement previously, and along with colleagues at the other organisations, quickly realised that by working together they could streamline the process and save valuable time and resources. The group have developed tender documents and contracts for the employers in their STP. They worked with their local NHS shared procurement services to develop the contract, which was adapted from an NHS framework agreement for the provision of services, and all partners have signed it. This means that even if they do not have an immediate requirement to use a training provider (which has been awarded by another partner), they can access this provision at a later date.

The next step was for all the partners to carry out a training needs analysis for apprenticeships, to enable them to get a better understanding of their requirements and projected numbers. The first joint tender carried out was for Leadership & Management Levels 3 and 5. They now have joint cohorts running with candidates from across the STP, giving the added benefit of networking with colleagues in similar roles and peer to peer learning. The procurement process started in December 2017 and the first cohorts of apprentices started in February 2018. During the procurement process, eight bidders submitted a tender and the group invited five training providers

in to present. The tender specification including the following qualifying criteria: the provider must be local, in a 30 mile radius from the main hospital so as to be accessible for learners; the provider had to be established in the community and be willing to work with all three Trusts. The winning bidder was a local not-for-profit training provider whose ethos fitted with the partners’ values, and who committed to spending any profits made on supporting learners in the local area. It was not a price-based decision, as the apprenticeship funding bands have set this; however, the winner provider was able to include the added value of an ILM diploma and an additional coaching qualification.

The next round of procurement was for the Level 4 Data Analyst standard, which included all three Trusts, the local County Council and the CCG. They were looking at ten starts in total, two per organisation, for existing staff who will start later this year. The next focus will be Nursing Associates and Assistant Practitioners, where these organisations are looking to follow the same joint procurement process.

Top Tips

- Join with local partners. Talking to colleagues about the challenges is a real help.
- Share best practice and ensure there is a transparent process.
- Don’t delay! Start early! Procurement does take a long time so plan 3- 6 months ahead, forecast requirements and plan accordingly.

Case Study CCS

Jennifer Stone
Apprenticeship Lead

**Barking, Havering and Redbridge University
Hospitals NHS Trust**
Staff 6500+
Public Sector Target 150
Levy £1.3 million



Jennie procured via LPP for a number of their apprenticeship programmes, including one of the very first cohorts of Nursing Degree Apprenticeships. She also used Crown Commercial Service for their Project Management, Level 2–4 Digital Apprenticeships plus Customer Service and Business Administration.

The difference with CCS compared to LPP is that there are a maximum of five providers on the framework per lot or subject area, and for some much less than this. There are also no template documents, so employers will need to work closely with their procurement team to draft these. Jennie found the input from her procurement team invaluable, and they had comprehensive documents that she was able to amend and adapt accordingly.

The Trust's own procurement template for services asked information-only questions which are not scored, allowing them to gain a greater understanding of the training provider and their offer. They then had five standard questions to ask, which kept the scoring process simple.

Jennie's procurement team uploaded the tender documents to the Bravo portal with an evaluation date, and the standard 10 day process started. Any questions from bidders went via the portal and were forwarded to Jennie to answer if the procurement team could not answer them.

As stated, there is a maximum of five providers per lot, so there is a danger that employers may not get any bidders based on their location or a

specific requirement. This is something to bear in mind as there will be a lot of initial work involved in preparing the documents. Luckily, Jennie did have bidders for all of her tenders, and with the scoring and evaluation process simplified, with set scores of 0 – 4, she found the process very straightforward.

The team consisted of three panel members who evaluated each bid, including Jennie, a member of the procurement team and an independent person. All bidders were notified via the portal with their scores, and a comparison against the winning bidder and key points for feedback. There is a template available for contract of services; be warned it is 244 pages but is easily adapted!

Top Tips:

- Allow plenty of time for planning and adapting the employer's procurement documents
- From the start, set clear responsibilities and roles for the Apprenticeship Lead and the Procurement Lead
- Set realistic dates for the timetable of dates and book these in your diary, allowing two full days for evaluations
- Carefully consider the KPIs the training provider must achieve as part of the contract. This should include the time frames for apprentices being uploaded on The Apprenticeship Service to ensure apprentice 'starts' data is up-to-date. This allows for equal monthly payments to be taken from your levy, not a large amount for numerous months back dating to the start of the apprenticeship.

Case Study Salisbury Managed Procurement

Mette Laszkiewicz
Head of Clinical Education

Berkshire Healthcare NHS Foundation Trust
Staff 4000+
Public Sector Target 105
Levy £600,000



Mette, with the support and guidance of Emma Wilton from HEE Thames Valley, has been part of a procurement exercise across the Thames Valley region for the Nursing Associate Apprenticeship. Aiming to continue their successful partnership model from the pilot programme, 13 organisations agreed to conduct a joint procurement exercise for 300 Nursing Associate Apprenticeships. The organisations involved are:

[Berkshire Healthcare NHS Foundation Trust](#)

[Frimley Health NHS Foundation Trust](#)

[Central and North West London NHS Foundation Trust](#)

[Buckinghamshire Healthcare NHS Trust](#)

[East Berkshire CCG](#)

[West Berkshire CCG](#)

[Oxford University Hospitals NHS Foundation Trust](#)

[Oxford Health NHS Foundation Trust](#)

[Royal Berkshire NHS foundation Trust](#)

[Milton Keynes University Hospital NHS Foundation Trust](#)

[Thornford Park Hospital, Elysium Healthcare](#)

[Berkshire Care Association](#)

[West London Mental Health Trust](#)

The consortium decided to use the NHS Salisbury Managed Procurement service as they were working to very tight deadlines and felt this was a flexible procurement model, allowing the process to be completed quickly to enable the first cohort to start in May 2018 as required. Simon Dennis, the Procurement Lead from Salisbury, attended a meeting in January 2018 with all the key stakeholders from the 13 organisations to discuss the process and their specific requirements. He provided the necessary paperwork and templates, so very little initial work was needed, as the comprehensive templates could be modified to meet their specific requirements.

Each individual organisation looked at the paperwork and suggested questions and scoring to identify what was important to them. Simon collated all this information together to ensure all the 13 partners' views were included. The final tender document was signed off in March which was then issued via the Bravo portal, inviting the education partners to bid.

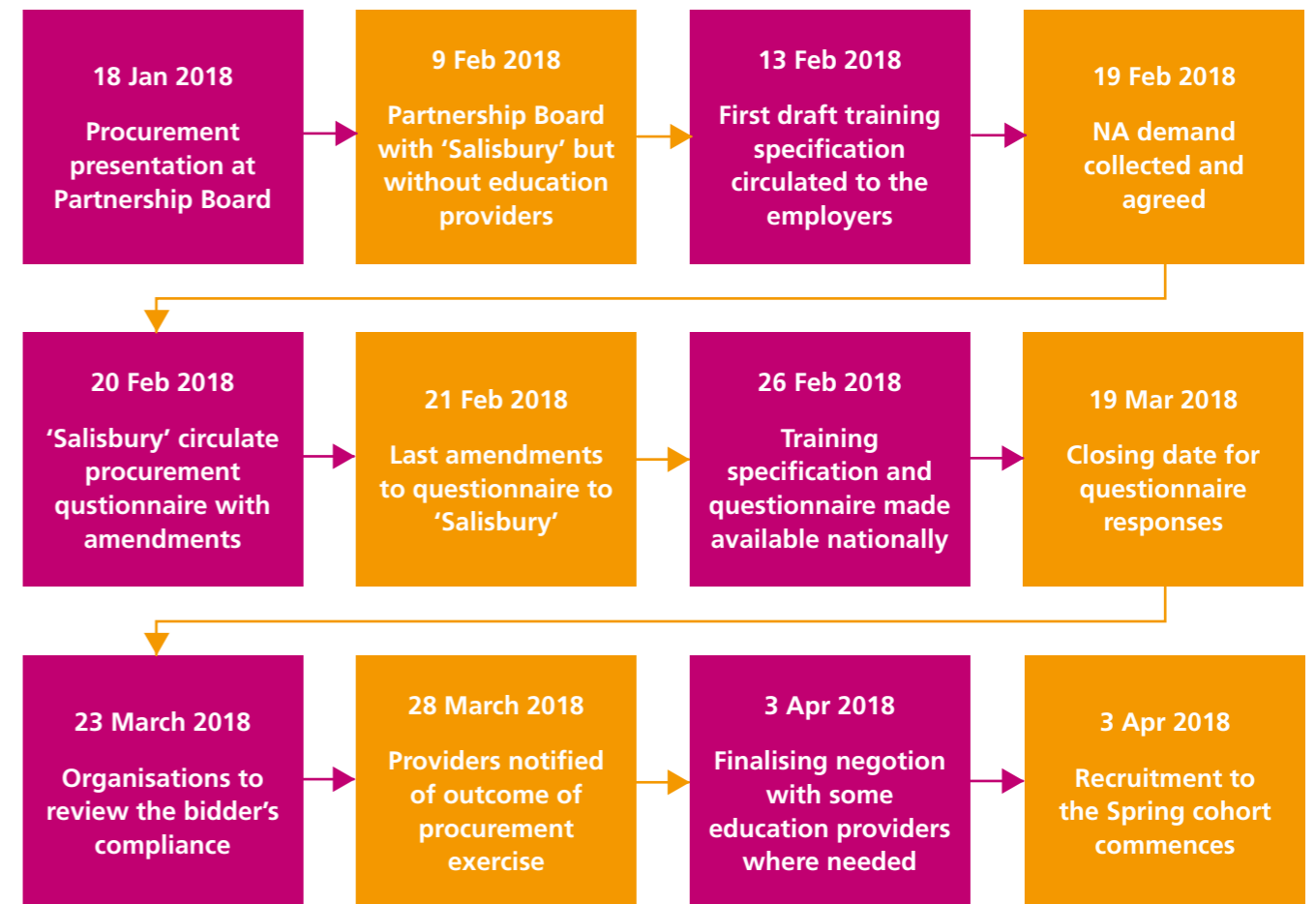
Local delivery was very important to all parties, as the programme was for Band 3 students and travel costs were a concern. As it was a very wide region included in the bid, bidders were made aware that more than one education provider would be awarded. The Education Providers were also asked to bid for the number they could provide and potential start dates.

There were 7 bids in total to review. Each organisation scored individually, then Simon collated the overall final scores.

The tender outlined that the programme would be for a mix of new recruits and existing staff, and set the expectation that the HEI would play a large role in the recruitment process. A qualifying question was that the HEI must have experience of delivering the NA programme as part of the pilot. The requirement was 300 starts for 2018 in total and exact numbers were specified for each of the 13 partner organisations.

At the end of the evaluation 3 HEIs were awarded: Oxford Brookes University, The University of West London and Bucks New University, ensuring the large geographical area could be covered.

Below is a timeline for the procurement process from start to finish:



Recruitment started in April 2018 for the first cohort of 100 to start in May 2018, with the remaining 200 due to start in the autumn.

The partnership will follow the Nursing Associate evaluation process as part of the HEE pilot to measure the quality of delivery. Mette feels that as this process and collaboration has been so successful and beneficial for all parties, there may well be scope to work together again for the Nursing Degree Apprenticeship and others such as the Occupational Therapist Degree Apprenticeship when it is approved for delivery.

Top Tip

- Virtual meetings = huge time savings, especially when working with such a large group

Summary

Procurement can be a lengthy process but it is essential to ensure maximum return of investment for the apprenticeship levy and high quality training provision. Once the initial work is completed, contracts can be extended rather than repeat the whole process again if all parties are happy.

We hope this information has been useful. All information is correct at time of going to print (April 2018). It will be updated if there are any major policy changes.

Useful Links

Healthcare Apprenticeships Online

<https://haso.skillsforhealth.org.uk/>

Institute For Apprenticeships

<https://www.instituteforapprenticeships.org/>

Find Apprenticeship Training

<https://findapprenticeshiptraining.sfa.bis.gov.uk/>

This toolkit has been developed by the Talent for Care team at Health Education England.

Please contact talentforcare@hee.nhs.uk for further information.

www.hee.nhs.uk