



Invitation to Tender (ITT)

Ref: RBL-23-24-034

Provision of Care Home Veteran-Friendly Framework: Independent Evaluation

for The Royal British Legion

Issue date: 5th April 2024

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Section 1

1. Background and Purpose

1.1 Background

The Royal British Legion (TRBL) is the nation's biggest Armed Forces charity. Our services include help and advice on financial support, legal advice, recovery from injury and illness, care, help around the house, support around inquests and compensation, and assistance returning to civilian life including support with employment and housing.

TRBL, Royal Star & Garter (RSG), and Veterans Covenant Healthcare Alliance (VCHA)¹, with funding support from the Armed Forces Covenant Fund Trust, are working together to develop and roll-out a Care Homes Veteran Friendly Framework (VFF) to help providers offer appropriate and personalised support to the thousands of veterans and their spouses/partners living in care homes across the UK.

The scheme and support is based on the [VCHA Veteran Aware](#) accreditation process, and aims to improve veteran health and well-being through ensuring the environment they live in, and the care they receive, better recognises and meets their needs.

The ultimate aim of the VFF project overall is to improve health, wellbeing and quality of life for members of the armed forces community (veterans and their spouses/partners/widow(er)s) living in nursing and residential care homes across England, and ultimately the UK, and to raise standards for everyone in care homes through applying the principles of the framework more widely.

A theory of change for the project is attached, and you can read more information about VFF here:

[Veteran Friendly Framework \(VFF\) \(britishlegion.org.uk\)](https://britishlegion.org.uk/veteran-friendly-framework)

[Veteran Friendly Framework](#)

At project launch in autumn 2023, 10 care homes had been accredited and a further 20 were in the process, covering some 600+ veterans and 1200+ staff.

The independent evaluation we are seeking proposals for aims to ensure future development of the scheme, and wider policy and practice, is informed by robust understanding of how well the VFF approach works to achieve its goals and why; improving evidence about what works most effectively, when, how, and for whom, to support our armed forces community living in care homes.

We believe learning about effective approaches to delivering person-centred care, and the steps towards this such as improving social connection and enabling reconnection with identity and memories, will have benefits for wider care home practice for the population as a whole.

This evaluation is being funded by TRBL, RSG, and the Office for Veterans Affairs (OVA).

¹ Commissioned by NHS England and hosted by the Royal National Orthopaedic Hospital NHS Trust

1.2 Purpose

TRBL is seeking a commercially competitive solution provider to deliver our requirement for the Evaluation of the Care Home Veteran Friendly Framework, (to be known as “the Service”)

The Key Objectives of this Invitation to Tender (ITT) includes the identification of a Supplier(s) that:

- provides a cost-effective solution which fulfils TRBL’s requirements.
- has the ability and willingness to meet TRBL’s capacity requirements and is prepared to be flexible and work with TRBL, incorporating any changes to the Service throughout the life of any resultant contract.
- will provide commitment to performance measurement targets and associated financial remedies for failure to achieve such targets.
- will comply with TRBL’s contract terms and conditions;

will work with TRBL to provide continuous improvements and quality assurance;

Suppliers must ensure that they are fully familiar with the nature and extent of the obligations required of this Service. They must realise and be aware that their proposed offer of Service is contractually binding and that the resulting Contract Agreement will be strictly supervised and closely monitored against their submitted offer (and to any subsequent mutually agreed amendments) and shall be enforced in accordance with the Contract provisions. The Suppliers will be deemed to have read, examined, and accepted the contract agreement and the terms and conditions contained when they submit their Tender.

It is the responsibility of the Supplier to obtain for itself, at its own expense, all information necessary for the preparation of its Tender.

The proposals should address how the Supplier would manage each element of the requirement and the proposed pricing models submitted should clearly explain how each would be priced.

The submitted Tenders should be valid for a minimum of 120 days following submission to TRBL.

Section 2

2. Instructions to Suppliers

Invited potential providers (“Suppliers”) should ensure that their completed proposals (“Tenders”) are submitted in accordance with the following instructions.

2.1 Tender Response Timeline

Your completed Tender should be submitted on or before the closing date and time which is: 12pm (Noon) on the 24th April 2024

TRBL reserves the right to deem any responses received after this time as void.

Responses are to be directed to the Procurement Manager running this process:

Name: Christopher Jones

Email: Cjones3@britishlegion.org.uk

2.2 Enquiry Timeline

If the Suppliers have queries regarding this ITT documentation, any and all questions should be submitted to the email address (here in 2.1) in accordance with the timetable given in 2.20, below.

Enquiries submitted after this date may not receive a response.

If the enquiry is felt to be of general interest to other Suppliers (such as the structure, content and meaning of any documents) then TRBL, at its sole discretion, will make the response(s) to these queries available to all Suppliers; however, the questions shall be anonymous to all recipients.

All enquiries related to this ITT should be directed, in the first place, to the Procurement Manager stated in 2.1.

If you have a large number of questions, please submit them within a table or spreadsheet using the following format:

Clause Ref:	Issue Description and Proposed Alternative

It is TRBL's intention to manage this process fairly and transparently. Please assist us with this by communicating only with the given email addresses (above) rather than contacting TRBL employees directly, until any Contract has been awarded or you are notified otherwise.

2.3 Confidentiality

These document contents must not be disclosed to any third party except for the strict purposes of your Tender and provided that third party is subject to an equivalent confidentiality obligation. Information that is supplied to Suppliers as part of this ITT is supplied in good faith; however, Suppliers must satisfy themselves as to the accuracy of such information. TRBL accepts no responsibility for any loss or damage of whatever kind or howsoever caused arising from the use by the Suppliers of such information unless such information has been supplied fraudulently by TRBL (where the meaning of fraudulently is "the making of false representation knowingly or without belief in its truth or recklessly").

All specifications, plans, drawings, samples, and patterns TRBL issue, in connection with this ITT, remain the property of TRBL and are to be used solely for the purpose of Tendering.

2.4 Conflict of Interest

Any potential conflict of interest must be disclosed to TRBL in writing. Any conflict of interest identified will be considered and evaluated by TRBL. TRBL has the sole discretion to take the steps they deem necessary to resolve the conflict. If, during the term of the Contract, a conflict or risk of conflict of interest arises, TRBL should be notified immediately, in writing, with explanation of that conflict or risk and any steps that TRBL reasonably requires to resolve the conflict or deal with the risk.

Proposals will not be evaluated if the Supplier's current or past corporate or other interests may, in TRBL's opinion, give rise to a conflict of interest in connection with this exercise.

2.5 ITT Qualification

By this ITT, TRBL reserves to itself the absolute and unfettered discretion to invite proposals, consider/analyse submissions, select short-listed Suppliers or attempt to negotiate an agreement with the Successful Supplier as TRBL considers desirable.

Without limiting the generality of the foregoing, TRBL reserves the right to:

- a) Reject, consider, or short-list any submission whether or not it contains all information required by this ITT;
- b) Request clarification where a submission is unclear;
- c) Reject any or all submissions without any obligation, or any compensation or reimbursement, to any respondent, intended Supplier or any other person associated with this ITT process;
- d) Disqualify or reject any submission without discussion with the submitting party;
- e) Reject any submission that TRBL considers is not in its best interests.

2.6 No Obligation to Proceed

Though TRBL fully intends, at this time, to proceed through the ITT, TRBL is under no obligation to proceed to the purchase or any other stage; TRBL reserves the right to award Contracts to one, some or none of the invited Suppliers. The receipt by TRBL of any information (including any submissions, ideas, or other materials communicated or exhibited by any intended Supplier or on its behalf) shall not impose any obligations on TRBL. There is no guarantee by TRBL, its officers, employees, or agents that the process initiated by the issue of this ITT will continue or that this, or any, ITT process will result in a contract with TRBL.

2.7 TRBL'S Decision-Making

TRBL reserves the right to make any decision or to exercise any contractual right or remedy, contemplated in this ITT at its own absolute and unfettered discretion.

2.8 Tender Documents

Participating Suppliers are requested to ensure that all pages of their proposed Tender shall be sequentially numbered (including any forms to be completed and returned).

The Supplier is expected to examine all of the instructions, forms, terms, conditions, and specifications that comprise their completed Tender documents, prior to submission to TRBL. If the Supplier does not provide all of the information required, TRBL may reject the Tender.

2.9 Amendments to ITT Documents

At any time, TRBL reserves the right to modify the Tender documents. Amendments for such shall be issued to all Suppliers, in writing.

TRBL may extend the associated timelines to allow for significant amendments to be fully assessed and taken into account.

2.10 Modifications and Amendments to Suppliers' Tenders

The Supplier may modify their proposed Tender, prior to the deadline for Tender receipt, by submitting a new Tender. The new Tender must be clearly marked as such and be an obvious replacement. TRBL take no responsibility for assessing the incorrect version of multiple submissions.

No Tender may be modified after the deadline for receipt.

Tenders may be withdrawn at any time before the award of Contract, providing such intention is notified to TRBL in writing.

2.11 Acceptance of Proposed Tender(s)

This is an invitation only; TRBL reserves the right to clarify any or all parts of the information contained in the Tender.

TRBL may ask you, at your expense, to answer queries, make presentations or attend formal meetings in relation to your Tender while it is being adjudicated.

TRBL intends to accept the Most Economically Advantageous Tender (MEAT) and, at its sole discretion, reserves the right to accept or reject all or any part of any Tender. TRBL does not bind itself to accept the lowest priced of any Tender.

This ITT should not be construed as an agreement to purchase goods or services. Proposals will be assessed in light of the evaluation criteria. TRBL will be under no obligation to receive further information, whether written or oral, from any Supplier.

Neither acceptance of a proposal nor execution of a Contract will constitute approval of any activity or development contemplated in any proposal that requires any approval, permit or license pursuant to any national, provincial, regional Legion or municipal statute, regulation, or by-law.

2.12 Suppliers' Expenses

Suppliers are solely responsible for their own expenses in preparing a proposal, answering queries, making presentations, or attending formal meetings in relation to your Tender and for subsequent negotiations with TRBL, if any. If TRBL elects to reject all proposals, TRBL will not be liable to any Supplier for any claims, whether for costs or damages incurred by the Supplier in preparing the proposal, loss of anticipated profit in connection with any final Contract, or any other matter whatsoever.

By submission of a proposal the Supplier warrants that, if this ITT is to design, create or provide a system or manage a program, all components required to run the system or manage the program have been identified in the proposal and/or shall be provided by the Contractor at no charge.

2.13 Evaluation Criteria and Weightings

Suppliers will be scored on their proposals and presentations by TRBL's evaluation panel.

Weightings are explained in Section 7.

If suppliers are shortlisted, customer references will also be required to assist us in determining how you deliver and maintain success. Therefore, if/where you have undertaken projects of a comparable size and nature, TRBL would like to see details of a current or recently serviced customers who TRBL may contact your permission. If you are unable to provide a reference, please explain why.

2.14 Supplier Presentations

If short listed, Suppliers will be required to present the proposed solution to the evaluation panel as per the timeline listed in 2.20 below.

Presentations will be conducted via video call and expected to include an overview of their proposed solution. The presentation should be no longer than 20 minutes in duration followed by up to 40 minutes for questions and responses. The key presenter on the day must be the proposed dedicated Project Manager/Account Manager for the contract.

2.15 Sub-Contracting

- a) Using a sub-contractor (who must be clearly identified in the proposal) is acceptable. This includes any joint submission by two Suppliers having no formal corporate links; however, one of these Suppliers must be prepared to take overall responsibility for successful interconnection of the two product or service lines and this Supplier shall be understood to be the potential successful supplier, for the award of Contract, and must therefore be defined and referenced as “the Supplier” within the proposal.
- b) Sub-contracting to any firm or individual who’s current or past corporate or other interests may, in TRBL’s opinion, give rise to a conflict of interest in connection with this project will not be permitted. This includes, but is not limited to, any firm or individual involved in the preparation of this ITT.
- c) Any sub-contracting of the service to any firm or individual after the award of a Contract must have prior written approval by TRBL.

2.16 Assignment

This ITT and any resulting contract may not be assigned by either party without the prior written consent and approval of the other party, which consent may not be unreasonably withheld; provided however, either party, without such consent, may assign or sell the same in connection with the transfer or sale of substantially its entire business to which this contract pertains or in the event of its merger or consolidation with another company. Any permitted assignee shall assume all obligations of its assignor under this contract. No assignment shall relieve any party of responsibility for the performance of any accrued obligation that such party then has hereunder.

2.17 Form of Tender and Schedules

Included with this ITT documentation is a copy of TRBL’s intended contractual terms and conditions of trade. If, for whatever reason, you do not wish to accept TRBL Contract Terms and Conditions, your reasoning for any deletions, modifications or deviations should be clearly highlighted and explained in the Tendered proposal. TRBL may decide to reject any Tender which contains any such deletions, modifications, or deviations.

Suppliers shall notify TRBL of any errors, omissions or details contained within the documents which precludes them from tendering for this Service.

Only prices and costs included in Section 5: Schedule of Prices and Costs shall be regarded as part of the proposal.

2.18 Submission of Tenders

These documents shall together comprise the "Tender". You should complete them using nothing more than Microsoft's Word (for Section 8), Excel (for Section 5) and/or Power Point and/or Adobe's PDF (to illustrate your proposal).

TRBL reserves the right to reject any tender if the Supplier has failed to complete and return all parts of the Form of Tender or fails to provide the information requested in this ITT, or has submitted any modification to their tender and/or has failed to explain the reason for such omission and/or modifications.

2.19 Proposed Costs and Prices

The price of Goods and/or Services shall be fixed for the duration of the Contract and shall not be subject to any increases to TRBL unless material changes are agreed and detailed in the terms and conditions of Contract.

The basis of the Suppliers proposed prices shall be inclusive of all costs for delivery to the address(es) specified in the conditions of Contract.

TRBL is required to reduce its year on year running costs. Suppliers will be expected to identify efficiency improvements throughout the contract period, without reductions in the level and quality of service provided. Such improvements should be reflected in the Suppliers pricing proposals.

2.19.1 Price and Cost Model Submission

The Tender should include for all purchase and ongoing life costs, of all line-items (goods and services) expected to be included in the delivery of the requested Service, for the full term of the Contract. VAT **should** be included within these costs.

The completed schedule of costs should be delivered in an editable version of Microsoft's Excel spreadsheet.

2.19.2 Completeness of Proposal

By submission of a proposal the Supplier warrants that, if this ITT is to design, create or provide a system or manage a program then all components required to run the system or manage the program have been identified in the proposal or will be provided by the Contractor at no charge.

2.20 Timetable

The timetable for this Invitation to Tender process is as follows:

Key Actions	Dates
ITT issue date	5 th April 2024

Key Actions	Dates
Response Date for Supplier Questions	12 th April 2024
TRBL Answers	17 th April 2024
Tender return date	Noon on the 24 th April 2024
Supplier Presentations	W/C 29 th April 2024
Contract Award Notification	w/c 29 th April 2024
Contract Start Date	TBC
Go-Live Date	TBC

If you wish to submit a tender response, please reach out to the designated individual mentioned in section 2.1 before the tender return deadline. They will provide you with additional forms related to GDPR and Data Security, along with the draft agreement for your review.

Please note that although it is TRBL's intention to operate to the above timetable, we reserve the right to amend this schedule at any time. We will endeavour to give participating suppliers as much notice of change as is possible.

Section 3

3. Scope of Service Requirement

3.1 Pre-amble

This document outlines TRBLs high-level requirements for the Care Home Veteran Friendly Framework (VFF) – independent evaluation

TRBL welcomes innovative proposals which the Supplier might feel would assist TRBL reach a greater potential so if you wish to offer any additional or alternative methods of fulfilling our requirements, to those as requested in the enclosed documents, please send details with, and IN ADDITION TO, the requested tender information. Please mark clearly which is the requested tender information and which is the additional proposal.

3.2.1 Service Description

Suppliers shall be expected to ensure their proposal addresses all processes and touchpoints, including detail of their own requirements, 3rd party requirements and the requirements of TRBL, to ensure the Service delivers a successful solution.

The proposal should include, but not be limited to, an explanation of the supplier's development process to supply to TRBL an evaluation of VFF which answers as a minimum these questions:

Evaluation Questions

Process

- Is the scheme **delivered in the way it was designed**? What adaptations have been made, and why?
- How are the accreditation standards implemented? Have there been facilitators or barriers to implementation?
- What do **care homes managers, staff, residents, and families believe works best** in the scheme? Does this vary between types of care homes, locations, or different groups? How could the best experiences be built on?
- What could be **improved in future delivery** of the scheme? Are there any aspects of support for veterans and the wider armed forces community in care homes that it does not cover, but could? What, if anything, can be said about its potential to influence selection of care homes for veterans/ spouses/partners?
- Are there specific needs, strengths or experiences of veterans and families from minority communities that may benefit from targeted or tailored support? E.g. LGBTQ+, women veterans, those from outside the UK?
- What provision and **support are currently available for families** of veterans, when they or their loved one lives in a care home, and how could this be improved? Including:
 - a. How best to enable families to help veterans who are living in a care home to manage memories, behaviours, connections, emotions relating to military life.
 - b. Exploring the identities and needs of 'dependants' in care homes, and how they relate to and engage with veteran community.
 - c. How do/can existing armed forces organisations support and connect veterans and family members with wider support in the community
- What do the care homes participating in the scheme believe **will change in future years**, in meeting the needs of the armed forces community living in residential / nursing care? Including:
 - a. Perceptions about future care needs linked to specific issues facing armed forces community, e.g. through prevalence of specific mental and physical health conditions, dementia, alcohol use, mTBI.
 - b. what will it mean for how care homes can best respond in coming decades?
- What resource will be required to continue delivery beyond this pilot? Are there different models (lower/higher cost)?

Impact

- What **difference has the scheme made** to care home practice, staff experiences and wellbeing, residents, and families? To what extent does delivery of the scheme achieve its ambitions?

Please refer to our theory of change to see the intended outputs and outcomes intended for this project. We are particularly interested in understanding:

- What tangible improvements in quality of care, well-being and quality of life can be attributed to the implementation of the framework?
- How does the VFF affect the satisfaction levels of veterans, families, and staff?
- Does VFF increase connections to other local armed forces services and organisations, and/or increase activity focused on the armed forces community, and what impact does this have on the life of veterans and families?
- What value (if any) does VFF **add beyond wider quality assurance and best practice** standards and support?
- What **aspects of the approach are most effective** – and what contextual factors are important? Do different activities make a greater or lesser difference for different groups (who have different characteristics, experiences, or identities), and if so, what can be said about how, and why?
- What major **barriers** could hinder impact unless addressed? How might these be overcome?
- What **unintended consequences**, positive or negative, have arisen?
- What does this mean for **core elements** of any future scheme, which must be in place and/or delivered in a particular way, to ensure success?
- How can the benefits of the scheme to individuals, organisations, and wider society best be **quantified economically**? What can be said about potential return on investment/ cost-benefits of the scheme in its pilot phase, and potential value in the long term?

Evaluation Activities

We are open to proposals for the best ways to answer the questions set out above, but believe this will be likely to require approaches including:

- **Collecting baseline data** on existing practice from all participating care homes, and follow-up data about changes at the 1-year review point, through standard surveys
- Collection of **demographic data** about care home residents and members of the armed forces community within care homes (including location, residents' age, gender, ethnicity, sexuality, gender identity and self-reported general health, specific health conditions including dementia and/or PTSD, and if possible, how care is paid for) - including understanding the extent to which the care homes involved in this project are likely to be similar or different from wider care homes across the UK
- **Analysis of quantitative and qualitative information on methods, timing, and activities involved in delivery**, collected by the project team and/or existing care home staff.
- **Considering tracking of a sample of care home residents' quality of life/wellbeing** throughout the project, using validated tools (such as quality of life, wellbeing, loneliness indicators (ONS4) or WEMWBS)

- A programme of **engagement with care home staff, residents, and their families** with different characteristics and involved in different activities across a range of care homes, to gather perspectives on the scheme's delivery and impact, to include:
 - a. Interviews – exploring in more depth the experiences, views, and ideas of care home managers, staff, residents, and families.
 - b. Case studies and/or journey-mapping - to identify and articulate factors common to success and changes achieved in a range of examples, and show the changing experiences of care homes, residents, and families.
 - c. Network mapping – showing how the relationships and partnerships of a care home, or of a local area, change over time.

- Quantifying **likely economic impact** through, e.g. social return on investment approaches

We are keen to build in participatory methods and welcome proposals involving people with lived experience in the armed forces community in design and delivery of research, taking into account who it is most appropriate and feasible to engage, when, and how, recognising the wide ranging access needs of care home residents, families, and staff, and ethical and safeguarding considerations.

Proposals will need to demonstrate methods proposed will deliver an objective evaluation and take validity into account throughout. Please also consider that the impact of the project will evolve throughout the duration of this evaluation, with the potential for considerable change in a care home between the early months of this evaluation, and the closing months.

RBL and project partners can work with the evaluator to support access to care homes, staff, and residents, and support some data collection and coordination of spaces and times for evaluation activities. However, we expect bidders to specify how many care homes, staff, and residents they will seek to engage, how these will be selected, and what support will be required from RBL and the VFF project team in this process.

Outputs

All outputs will need to be engaging and accessible, providing learning that can be used in practice, and contributing to future development and sustainability.

Outputs will need to be useful to a range of audiences, including armed forces charities, policymakers and decision-makers, care home managers and staff, residents, and families, and wider research & evaluation agencies.

We are open to proposals for the best products to meet our needs if you would like to propose additional approaches to summarising and communicating progress and findings, but required outputs will include:

- Project inception and scoping meetings at the start
- A project plan for all activities, including a comms and influencing plan setting out how findings and learning will be shared, and good practice scaled.
- Materials for all evaluation and research activities, reviewed and agreed by the VFF project team.
- A data sharing agreement setting out clearly how VFF partners and the evaluator will share data with all parties involved.
- Full risk register updated at least quarterly.

- Meetings to review progress and plan ahead, each week, from the evaluator, overseen by the RBL Research team.
- Written updates presenting progress and evolving findings at monthly project steering group.
- If the evaluator does not already have a similar governance function, establishing a quarterly evaluation advisory group, drawing in experts from across the armed forces and wider care sector who specialise in evaluation, to advise on best practice and work together on maximising impact of findings.
- Summary of initial findings and proposed recommendations by end Dec 2024, to include a presentation and discussion with the project steering group about future development of the evaluation.
- Production of a detailed and engaging final report, summary presentation, and accompanying communication materials by end March 2025, with prior discussions with the project steering group to finalise plan for final products.

Organisational experience and capabilities

Our requirements of our research and/or evaluation partner skills and expertise are:

- Understand and align with our ethos and values, ideally with a good understanding and track record of evaluation work directly with the armed forces community and/or organisations who support them.
- Appropriate ethical and research integrity procedures, with evidence of previous engagement with participants with a range of needs and experiences and adapting methods to engage successfully with older people, people with disabilities and/or mental and physical health conditions.
- Good interpersonal, communication and management skills, including willingness to raise and address risks at the earliest stage and engage with wide-ranging stakeholders, including policymakers, government agencies, charities, and beneficiaries.
- Able to keep a multi-faceted evaluation project on track and delivering timely, high-quality outputs, managing competing demands on time.
- Track-record in producing engaging and creative outputs that create impact.
- Horizon-scanning activity and existing networks that can be learned from
- Can work and consider learning across the UK, taking into account differences in policy, funding, and delivery contexts.
- Experience of economic or return on investment analysis, and the ability to draw sound conclusions on value for money.
- Understanding of complex systems and how evaluation can help make sense of changes in this context, with a limited budget (e.g. challenge of impact taking a long time to emerge; simultaneous impacts on different parts of system; establishing contribution/attribution)
- Able to support us to learn internally, including advising on how we can make our data collection and reporting methods as effective as possible for the long term.
- Experience of designing and embedding participatory methods, especially with participants relevant for this project, such as older people, and/or staff in care settings
- Working collaboratively with project teams within charities, with ongoing dialogue and adaptations to approaches based on feedback and learning throughout

3.2.2 Key Requirements of the Resulting Contract:

Mobilisation:

- a) The Tender should include the supplier’s proposed Mobilisation Plan which will become part of the resulting contract documentation and shall represent the period between Contract award and Go-Live, of the Service.
- b) It should include a timeline of deliverables with detail to explain all resources, processes, requirements, roles, and responsibilities of all elements of the works required to ensure a successful Go-Live including proposed timeline for engaging with RBL and other key stakeholders.

Delivery Lead Time(s)

- a) The proposal should include detail of all service delivery lead times and associated constraints within the supply chain which may have an effect upon development, mobilisation and/or commissioning of the Service.

Flexibility and Capacity

- a) Suppliers are requested to provide details of how they propose to manage any time or volume sensitive variations, with regards to their capacity, and any associated increase or decrease in price.

Performance

- a) Supplier Service Levels and associated Targets should be included within the proposed Tenders to illustrate the supplier’s commitment to and intention of providing a successful Service to TRBL.
- b) Suppliers are requested to provide details of how they would resolve and remedy disruption and or failure of service and the proactive action that they would take regarding TRBL’s requirements during such disruption. Considerations should be noted for TRBL’s dependency upon its other 3rd party services.

Section 4

4 Due Diligence

The purpose of this section is to guide the participating suppliers in submitting sufficient information as to satisfy TRBL that any successful supplier(s) has the capacity, technical ability, and the management controls to perform its contractual obligations efficiently and cost-effectively.

Each Tender must include the following information: please complete each of the following elements fully, in the order given.

If you consider that any question is not relevant, please explain your reasoning.

If you are unable to comply with any aspects of the TRBL requirement, please explain your reasoning.

Information submitted by Suppliers within this questionnaire may be used within contractual agreements to address the requirement as seen in relation to the Solution supplied.

Supplier’s Structure	
Company Name:	
Registered Company Address:	

Company Registration number:	
Date of Registration:	
VAT Registration number	
Is your organisation one of the following? - A public limited company - A limited company - A partnership - A sole trader Any other (please specify)	

Supplier's Company Overview	
Please provide a succinct summary of your principal business activities and detail why this is relevant to TRBL's requirements.	
Please state the total number of permanent FTE's and temporary employees employed by your company.	
How many employees will be directly involved in the service delivery to TRBL? What is the proposed split, between permanent and temporary staff, for this Service? Please provide a description of their relevant responsibilities.	

Insurance	
Please state the value of your current insurance cover for: Employer's Liability: Public Liability: Professional indemnity Other (please provide details):	

Supplier Customer Feedback	
Please provide two references where you have undertaken projects of a comparable size and nature of simultaneous multi-sited activity, who TRBL may contact your permission.	
<u>Reference 1</u> Customer contact name and phone number: Date contract awarded: Contract reference and brief description: Value: Date contract completed:	
<u>Reference 2</u> Customer contact name and phone number: Date contract awarded: Contract reference and brief description: Value: Date contract completed:	

Quality Assurance	
Does your organisation hold a recognised quality management certification? If so, please provide details (e.g. ISO 9000 or equivalent standard).	
If the answer to the above is “No,” does your organisation have a quality management system? (Yes/No) Please provide an outline of any QM you may have in place.	

Sub-contractors			
Please provide details of any/all sub-contractors which might/will assist you in providing TRBL with the goods/services required			
	Name	Business Type/Service provided	% of your Project
Sub-contractor 1			
Sub-contractor 2			
Sub-contractor 3			

ESG – Please provide Copies of policies if relevant.	
Does your organisation have a policy on human trafficking and slavery for your employees and contractors? If so, please provide a copy.	
Do you pay either the Living Wage or the London Living Wage to your employees?	
Does your company have an environmental policy?	
How do you measure and report on your sustainability performance?	
What steps do you take to promote diversity and inclusion within your workforce?	
How does your company measure its social impact?	
How does your company engage with and contribute to the local community?	

Section 5

5 Pricing Structure

A critical element of TRBL’s evaluation process is assessing the commercial proposal.

Suppliers should ensure their response contains the most commercially competitive solution possible. Decisions made by TRBL will be taken based upon the best value for

money proposed. Therefore, please provide a **fixed cost proposal** to deliver the outlined scope of services, clearly including (but not limited to) the following elements:

- Salary costs (to us) for each team member (broken down by number of days, member of staff, and activity)
- Administrative costs
- Travel and subsistence.
- Full cost details of any proposed sub-contracts and how these will be managed.

The total available budget for this evaluation is **£90,000** inclusive of VAT.

Where you can provide 'optional' services please clearly indicate the applicable cost or where no cost is applicable, please state as FOC.

Pricing

- All costs and prices quoted shall be maximum prices for the validity of the Tender offer in UK Pounds Sterling (inclusive of Value Added Tax).
- Suppliers must complete all elements of the enclosed Pricing Schedule/ using an editable Microsoft Excel spreadsheet. The Supplier should ensure that the proposal includes all supply, delivery, and on-going life cost-plus anything else for which the supplier would expect to charge, to deliver a successful Service.
- TRBL may choose to place contracts with more than one supplier for this Contract Therefore, if TRBL selects not to award the whole Contract to one supplier, suppliers are requested to indicate if there is an effect on the pricing offered in their tender submission.
- TRBL reserves the right to seek further detail of any tender submission in order to establish the costs as detailed within the proposed pricing models.
- Any pricing assumptions should be stated.

Section 6

6 Contract Management

6.1 Overview

The successful supplier shall be subject to TRBL's Contract Management process, to ensure that the relationship between the parties is progressively developed to achieve a collaborative relationship approach focused on the delivery of mutual gain, organisational alignment, risk management, identification and delivery of operational efficiencies as well as the promotion of a "best in class" performance.

Key phases in the development of the relationship shall be expected to include, but not be limited to: -

1. Implement and ensure a service delivery which supports business priorities and requirements.
2. An enhanced service offering and ongoing service and process improvements via proactive review and/or re-engineering.

3. Delivery of best practice solutions and service excellence with the aim of delivering the customer's objectives and exceeding their expectations.

In order to achieve this progressive development, of the relationship, the supplier shall be expected to work with TRBL throughout the life of the contract, to ensure and/or deliver: -

- Agreeing, monitoring, and reporting of expectations of what success should "look like."
- Mutual understanding of and commitment to delivering the objectives.
- Development of metrics and KPIs in order to manage performance, celebrate success and the identification of any required corrective actions.
- Joint exploration and adoption of innovative approaches and technologies with regards continuous development
- Structured contract review process to discuss the above issues and actions.

6.2 Response Requirements

It is important therefore that TRBL identifies a business partner who is aligned to our Contract Management ethos and objectives, your response should therefore address each of the following points and provide a response in accordance with the requirements stated.

6.2.1 Reporting Requirements

It shall be a requirement that metrics and performance indicators shall be provided to TRBL by the supplier, the frequency of this reporting shall be agreed between the parties. The purpose of such metrics/performance indications is to allow:

- The performance of the contract be monitored and measured;
- Identification of all areas of non-performance to ensure that appropriate corrective action plans are implemented to bring service back into line with contractual requirements expeditiously;
- Identification of opportunities, which provide measurable improvements on any supply proposition.

Within your response, you should include detail to explain how you would manage the measurements and production of the reports to represent the performance metrics, as required, from the inception of services. Therefore, your proposal should clearly illustrate: -

1. Confirmation that your organisation shall provide the minimum requirements, as stated above, and shall be able to do so upon the commencement of the Service. Please include in your response specimen copies of such reports, with detail of who will be responsible for producing them and the frequency by which they shall be produced.
2. Confirmation that your organisation will not unreasonably withhold its consent to provide metrics and performance indicators over and above the minimum requirements stated which relate to the performance of the services and are in accordance with principles stated above.

6.2.2 Relationship Frameworks

It will be a requirement of any contract awarded that formal structures and frameworks exist to facilitate the development of the relationship.

The following represent the initial minimum metrics that are required from the inception of services;

- Monthly reporting of agreed metrics
- A minimum of quarterly contract reviews
- Annual strategic reviews
- Executive sponsorship

As part of your response to this ITT your organisation shall be required to provide the following:

- a. Confirmation that your organisation shall appoint a dedicated Account Manager with whom the TRBL project team can liaise for day-to-day issues and regular meetings and reporting.
- b. Confirmation of an Executive sponsor who will act as your organisation's TRBL relationship sponsor for reasons of quarterly/annual reviews and any escalation requirements. Your response should include explanation of where this position sits within your organisation's hierarchy.
- c. Your proposal as to potential change control mechanisms which might enable deviations in service to be identified, to ensure necessary corrective actions are implemented and contract amendments to be created to reflect the changes – as agreed.
- d. Assurance that appropriate resources shall be made available to support quarterly contract and annual strategic reviews. Specific agenda items would be agreed but should include (but not be limited to):
 - a review of performance against TRBL's service levels;
 - review of performance compared to best-in-class;
 - progress against the Process and Continuous Improvement Plan detailed below;
 - communication plans to broadcast successes;
 - standardisation opportunities; and
- e. In addition, TRBL would welcome any thoughts your organisation has in regard to the identification of development opportunities, as identified throughout the term of the Contract, for improved performance.

6.3 Continuous & Process Improvement

TRBL is keen to ensure a progressive development of the relationship between the parties to ensure that it constantly evolves either in terms of service scope, delivery methodology, best practice techniques, seeking out simplification opportunities and/or cost improvements.

As part of your response to this ITT, your submission should provide the following:

- a. Examples of any existing or previous customer relationships, where innovation ideas were identified by either the customer or

you, the supplier - and implemented as a joint effort. More specifically, details of the ideas identified, implementation process, timescales required to implement, and the benefits derived.

- b. Confirmation that the quarterly reviews shall include (but not be limited to) an agenda item and allocated resource regarding qualitative reporting of all the innovation opportunities identified over the life time of the contract, the likely impact of implementation (or not implementing) and the associated implementation timescales, resource requirements and, where applicable, costs..

6.4 Risk Management

It is imperative that risk is actively managed which shall include the identification of risk and risk mitigation plans as well as the development and testing of robust business continuity plans.

As part of your response to this ITT you should include detail of the resource which shall be applied to the issue, reporting, management, and mitigation of, risk in relation to this Service.

Section 7

Supplier Response

TRBL is seeking a commercially competitive solution provider to deliver our requirement for the Service. In order to evaluate the responses most effectively and efficiently, please address (in no more than 20 pages, Font size 11 and 1.5 line spacing) your response to all following areas and questions. Evaluation will be conducted by an independent panel of stakeholders using a weighted matrix. The questions will be scored on a scale from zero to five, where zero indicates No Evidence, through to five which represents Evidence of Strength and Additional Value. Weighting will be as indicated:

1. Understanding of brief (10%)

- A brief summary of your proposal, team, and ambitions in responding to this ITT and how this will meet our requirements as outlined in section three.
 - Tell us how your organisation and approach fit with our values and ethos.

2. Proposed Methodology (30% - robustness and suitability)

- An overview of the challenges and opportunities available to us
- Your proposed method/s for conducting research and/or evaluating the project, including:
 - what data and information you expect to capture and how you expect to implement this
 - tools and techniques you will use to meet our ambitions.
 - how you have assessed and decided on the best suited approach

3. Relevant skills and experience of the team (25%)

- The team (with CVs / biographies in an annex) and their role in the evaluation/research, including:
 - Each individual's expected contribution

- How skills and experience match the requirements in this ITT
- How you will manage absences of key staff members
- Track record in evaluating similar projects and/or relevant research.
 - Please provide examples of relevant outputs from other projects

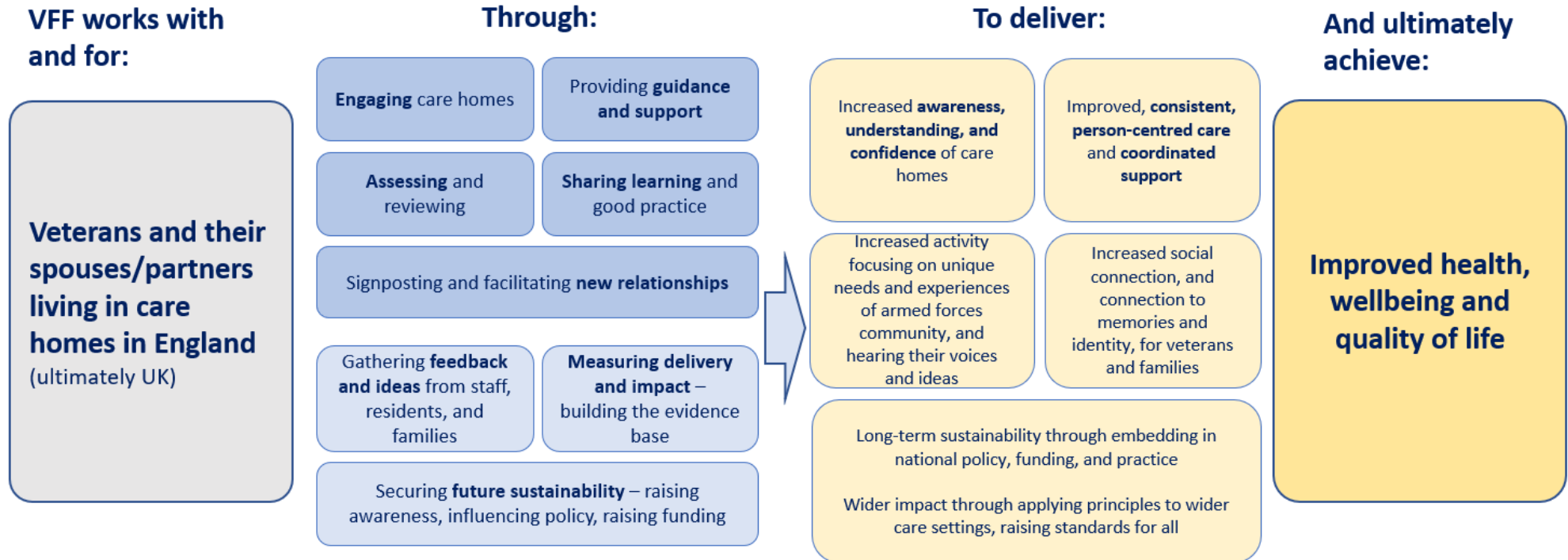
4. Project management, risk management, quality assurance and reporting (25%)

- Plans for reporting and dissemination.
- Management arrangements and quality assurance processes
- A detailed timetable for carrying out the work, highlighting key milestones, deadlines, suggested meetings and progress reports.
 - If any of your proposed methods require independent clearance (e.g. research ethical approval) please set out how this will affect the delivery timelines.
- Risk assessment and management approach.
 - Outline the main risks you foresee and how they will be managed.
 - Ethical considerations
 - Managing any conflicts of interest that may arise.

5. Overall costs (10%)

- Costings - inclusive of VAT.
 - Salary costs (to us) for each team member (broken down by number of days, member of staff, and activity)
 - Administrative costs
 - Travel and subsistence.
 - Full cost details of any proposed sub-contracts and how these will be managed.

Overview – Theory of Change headlines



Who for	Inputs	Activities	Outputs	Outcomes - what results happen because of the activities done?	Ultimate goal
<p>The armed forces community –</p> <p>Veterans and their spouses/partners living in care homes in England (ultimately UK)</p> <p>Working with care home owners, managers, and staff</p>	<p>Staff – min. 2-3, up to 6 (mgmt, training and support, admin, comms, coordination)</p> <p>Funding – - Delivery - Evaluation</p> <p>Partner expertise</p> <p>Governance structures – advisory board</p> <p>IT Systems – CRM, website</p>	<p>Identify care homes & decision-makers</p> <p>Raise awareness - proactive outreach</p> <p>Create framework, guidance and resources</p> <p>Conduct assessments Conduct 1 year reviews</p> <p>Provide feedback & signpost to support</p> <p>Identify existing pathways and partnerships in local areas</p> <p>Facilitate links to other local partners e.g. GPs, and networks</p> <p>Share good practice, facilitate learning and support</p> <p>Deliver programme of comms, promotion, events</p> <p>Gather feedback and ideas from staff, residents, and families</p> <p>Measure and report delivery and change</p> <p>Influence future policy & funding – meetings, comms: DHSC, OVA, CQC</p> <p>Develop income generation options</p>	<p>Number (and %), type, geographical spread of care homes contacted - involved / who choose not to engage</p> <p>Clear definition of what good looks like</p> <p>Number, type, geography of care homes with VFF status, and passing 1 year review</p> <p>Amount and type of feedback provided</p> <p>% staff care homes have trained; % staff satisfied with training and support</p> <p>Number and type of new contacts signposted to</p> <p>New Service Level Agreements signed</p> <p>Care homes network established; number of meetings held, comms sent, engagement and feedback</p> <p>Veteran and spouses/partner identifiers captured in data</p> <p>Increased evidence base - value & impact – output and outcome measures, case studies, feedback</p> <p>Number/type of media and events mentions demonstrating awareness of and/or support for project</p> <p>Sustainability plan</p>	<p>Improved care home awareness and understanding</p> <p>All care homes offered opportunity to participate</p> <p>Care home managers and owners feel positive & confident in value of scheme</p> <p>Staff identify and want to address unique experiences and disadvantage</p> <p>Increased staff satisfaction and confidence in being able to deliver tailored care</p> <p>Definition of what good looks like is understood</p> <p>Care homes value support and network</p> <p>Staff recognise unique experiences and needs for specific groups, e.g. LGBT+, non-UK, women veterans</p> <p>Improved Quality of Care</p> <p>Increased delivery of tailored, person-centred care, respecting individual choices (including dementia care)</p> <p>Delivery to consistent standard – reduced variation</p> <p>Increased number, speed of referrals to wider support for residents</p> <p>Improved integration and coordination of support</p> <p>Immediate improvements for veterans/family</p> <p>Veteran/family members feel their needs are met</p> <p>Veteran/family voices are used to shape experiences and opportunities</p> <p>Increased social connection/comradeship</p> <p>Increased connection (where desired) with memories and identity</p> <p>Increased activity focusing on armed forces community</p> <p>Increase in signatories to AF Covenant</p> <p>Increase in Care Homes participating in Defence Employer Recognition Scheme</p> <p>Increase in events and activities focusing on armed forces community</p> <p>Increased activity to hear veteran/family voices and ideas</p> <p>Sustainability & system change</p> <p>Increased funding directed to activity supporting armed forces community in care homes</p> <p>Sustainable funding for programme secured</p> <p>VFF embedded in policy & practice, e.g. in CQC inspection framework</p> <p>Principles and good practice from VFF applied to wider care settings – raising standards for all</p>	<p>Improved health, wellbeing & quality of life</p> <p>Including:</p> <ul style="list-style-type: none"> • Increased individual sense of purpose • Moving on/back to independent living • Less time in hospital, more at home • Improved health conditions • Reduced mental health crises • Reduced health inequality