

# **NHSBSA Pensions Re-Procurement Programme**

Medical Services– Supplier Boot Camp

22<sup>nd</sup> March 2016

# Introduction to NHS Business Services Authority

***Tony Waldron***

***Head of Strategic Sourcing - Pensions***

## **NHS Business Services Authority**

- NHSBSA
- Special Health Authority
- Strategic Goals
- Boot Camp Purpose
- Key Dates

## The Team

Name	Role
Steven Pink	Director of Change and Commercial Delivery
Tony Waldron	Head of Strategic Sourcing - Pensions
Theresa Britton	Head of Pensions
Matthew Lowin	Lead Business Analyst
Martin Skipper	Business Analyst
Linda Bates	Compliance Advisor
Paul Jackson	Senior Strategic Sourcing Manager
Jonathan Whitley	Senior Strategic Sourcing Manager

# Introduction to NHS Pensions

## Theresa Britton – Head of Pensions

The NHS Pension Scheme is an unfunded occupational pension scheme, backed by the Exchequer, operating under regulations made by the Secretary of State. The scheme is open to all NHS Employees and employees of other approved organisations covering England and Wales. NHS Pensions receives contributions in the region of £10 billion per annum and makes payments of around £9.5 billion.

The NHS Pension Scheme provides pensions, based on final salary, or career average earnings in certain circumstances, for employees of participating Employing Authorities (EA's).

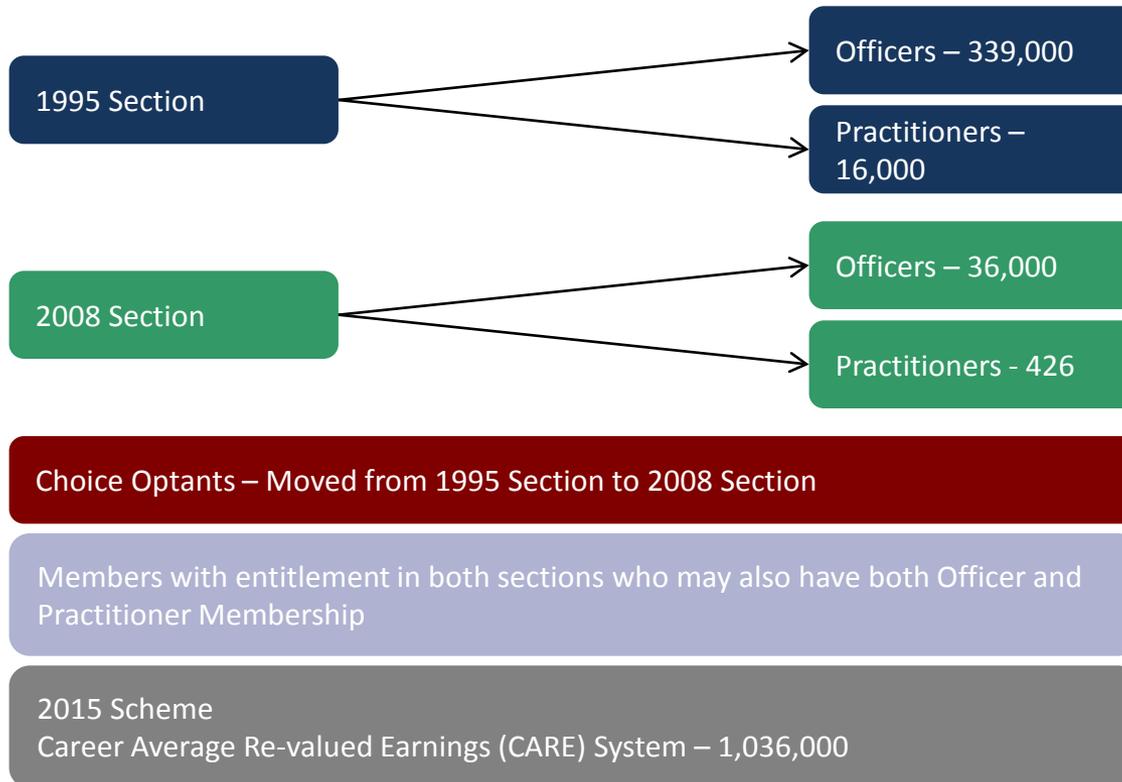
### Employing Authorities

Organisation Type	No of Participating Employers
Clinical Commissioning Groups (CCG)	211
Commissioning Support Units (CSUs)	21
Direction Bodies	659
GP Practices	8100
Independent Providers (IP)	24
NHS England (Area Teams)	1
New Fair Deal (NFD)	92
Primary Care Trust (PCT)	9
Local Authorities	141
Special Health Authorities	10
Trust	279
<b>Total</b>	<b>9547</b>

### NHS Scheme Membership

Member Type	Volume
Officer Members	1.37million
Practitioner Members	58,000
Deferred Members	583,000
Benefit Recipients	828,000

# NHS Pension Scheme Design



## Overview of Medical service

**Linda Bates – Compliance Advisor**

**Matt Lowin – Lead Business Analyst**

## Definitions

- Ill Health Retirement
  - Tier 1
  - Tier 2
  - Serious Ill Health (HMRC)
- Early Payment of Deferred Benefits (EPDB)
- Permanent Injury Benefit / Temporary Injury Allowance
- Disputes
  - IDR 1 / IDR 2

## Overview of Assessment Process

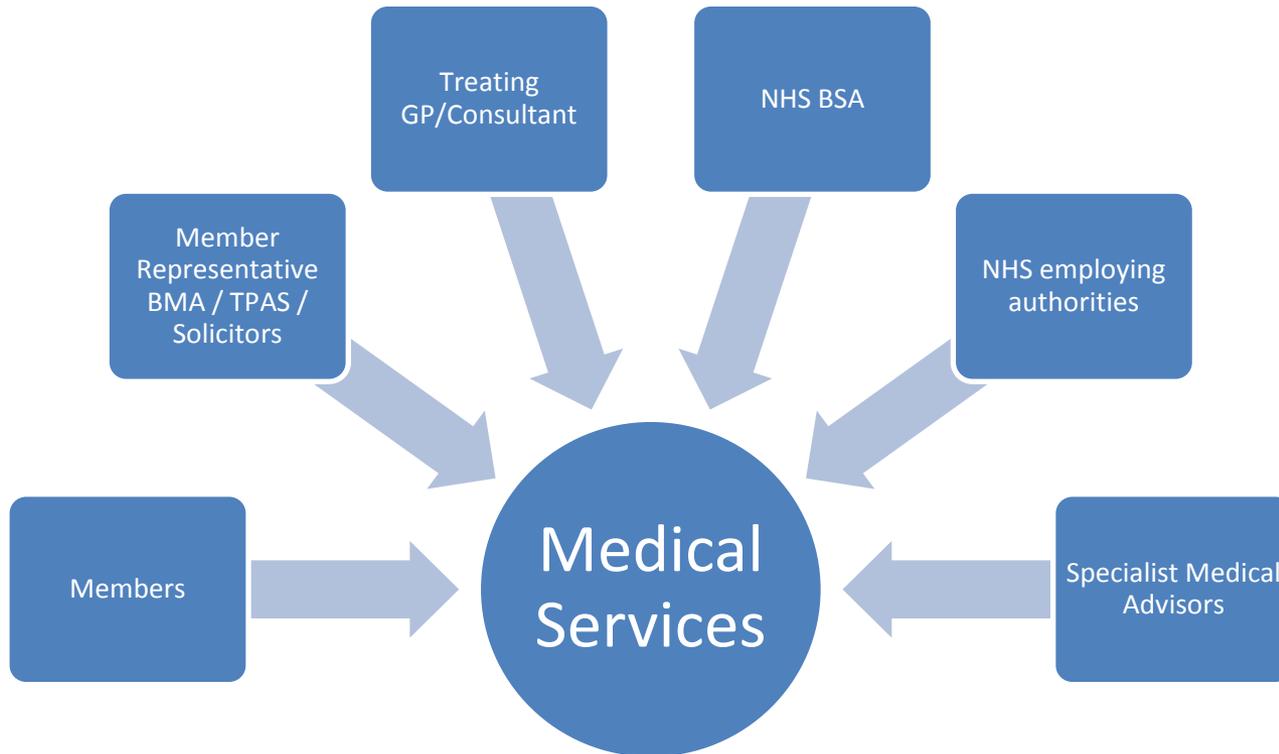
- The consideration of evidence to determine the outcome of the applications;
- The completion of notifications and advice including rationale supporting decisions and recommendations;
- Keep all relevant parties engaged;
- Sourcing specialist advice, as required;
- The decision maker on new applications;
- External Scrutiny e.g. Ombudsman

## Overview of Medical service

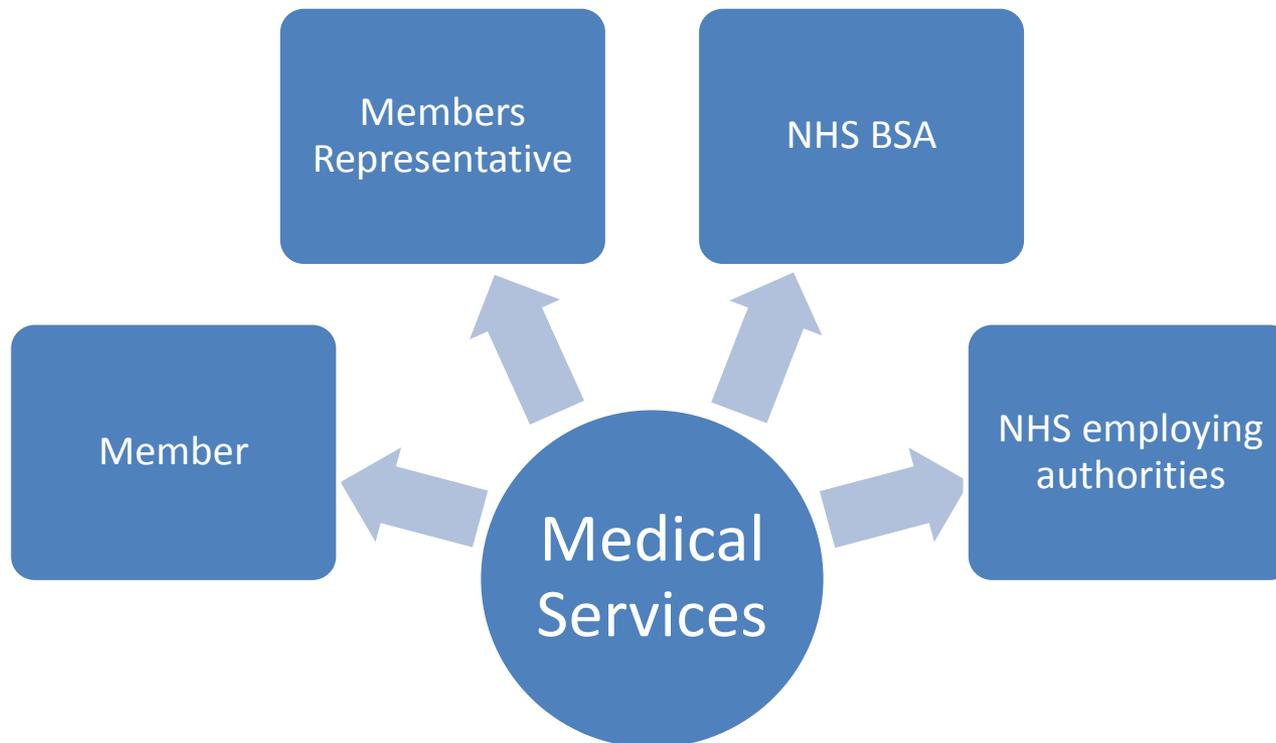
The provider of the service will:

- Understand scheme differences
- Make and convey the decisions on initial applications for ill health retirement benefits and permanent injury benefits in line with the provisions of the NHS Pension Scheme Regulations and NHS Injury Benefit Regulations.
- Provide medical advice and recommendations in relation to claims for temporary injury allowance
- Provide medical advice and recommendations for disputes under the Internal Dispute Resolution procedures and in response to investigations by the Pensions Ombudsman
- Provide advice and recommendations in other cases where reasonably requested by the NHS Pensions of NHSBSA, e.g. incapacitated child

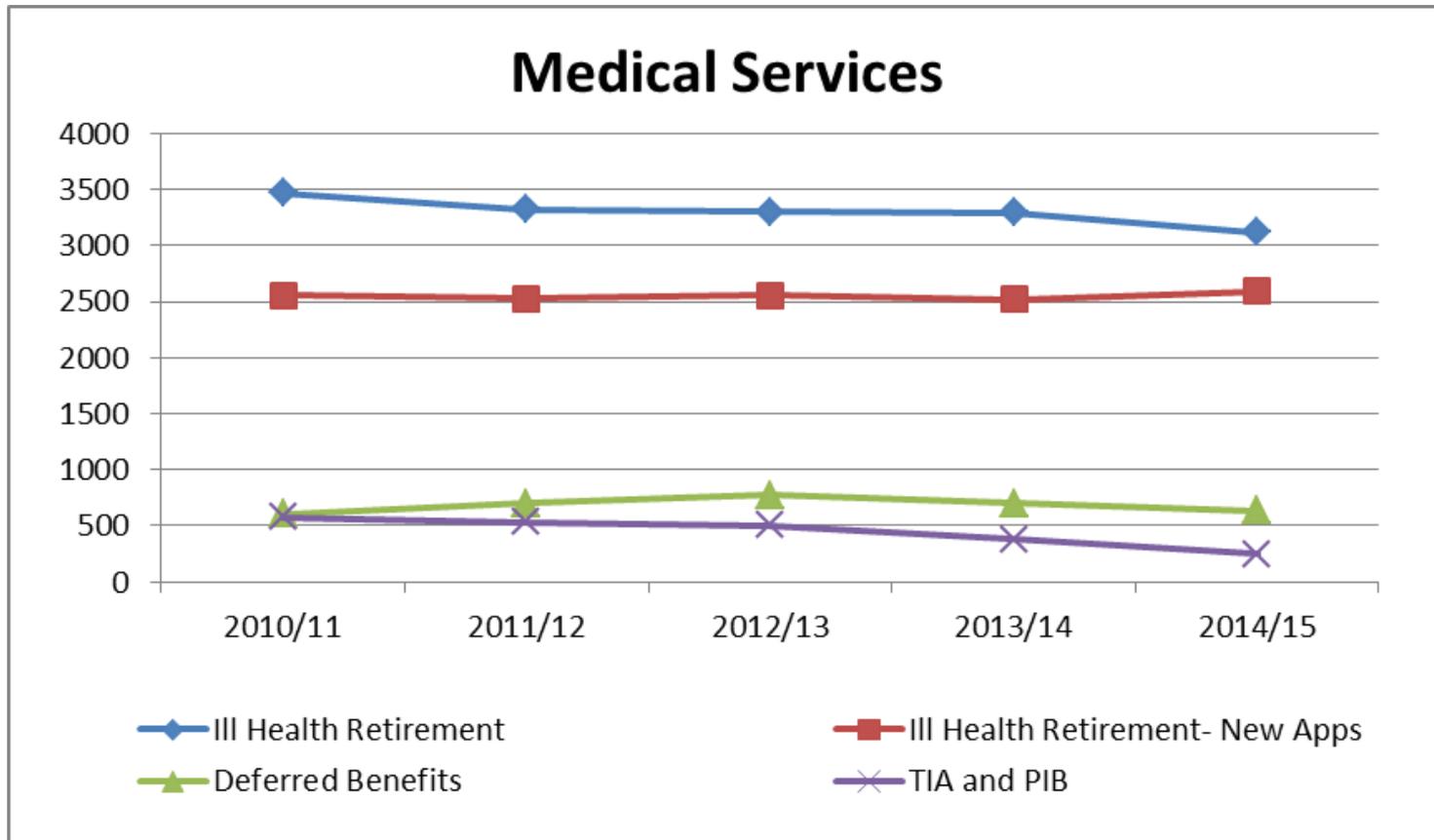
## Medical Services – Key Inputs



## Medical Services – Key Outputs



## Trend - 'Requests' – 2010 to 2015



## Governance

### INFORMATION GOVERNANCE

- Medical Records
- Sharing and transferring information
- Data Security

### REGULATORY

- Pensions Act
  - IDR 1 – Decision issued by NHSBSA within 40 working days
  - IDR 2 – Decision issued by NHSBSA within 40 working days

### CONTRACT PERFORMANCE

- Quality / Audits
- Timeliness

## NHSBSA Goals

- Shift in communication channel away from paper by offering a digital service to all customers
- Provide ease of access for all customers
- Increasing the efficiency of Services
- Improving the 'Members Journey' through effective and efficient decision making

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**Any questions?**

## Procurement Status

### **Jonathan Whitley – Senior Strategic Sourcing Manager**

#### **Overview:**

- Path to approval – OBC Final Approval Pending
- Disaggregation of Services
- Use of the Official Journal of the European Union (OJEU) competitive process / light touch
- Use of an abbreviated Crown Commercial Service Model Form Contract
- Special Additions Regarding Clinical Governance / Handling Medical Records
- Contract duration

# Procurement Communication and Information

## 1. Suite of tender documents

- Pre-Qualification Questionnaire (PQQ)  
<https://www.gov.uk/government/publications/public-contracts-regulations-2015-requirements-on-pre-qualification-questionnaires>
- Instructions to bidders
- Specification / requirements
- Evaluation criteria and scoring methodology
- Tender schedule

## 2. Data room

## 3. Use of Bravo

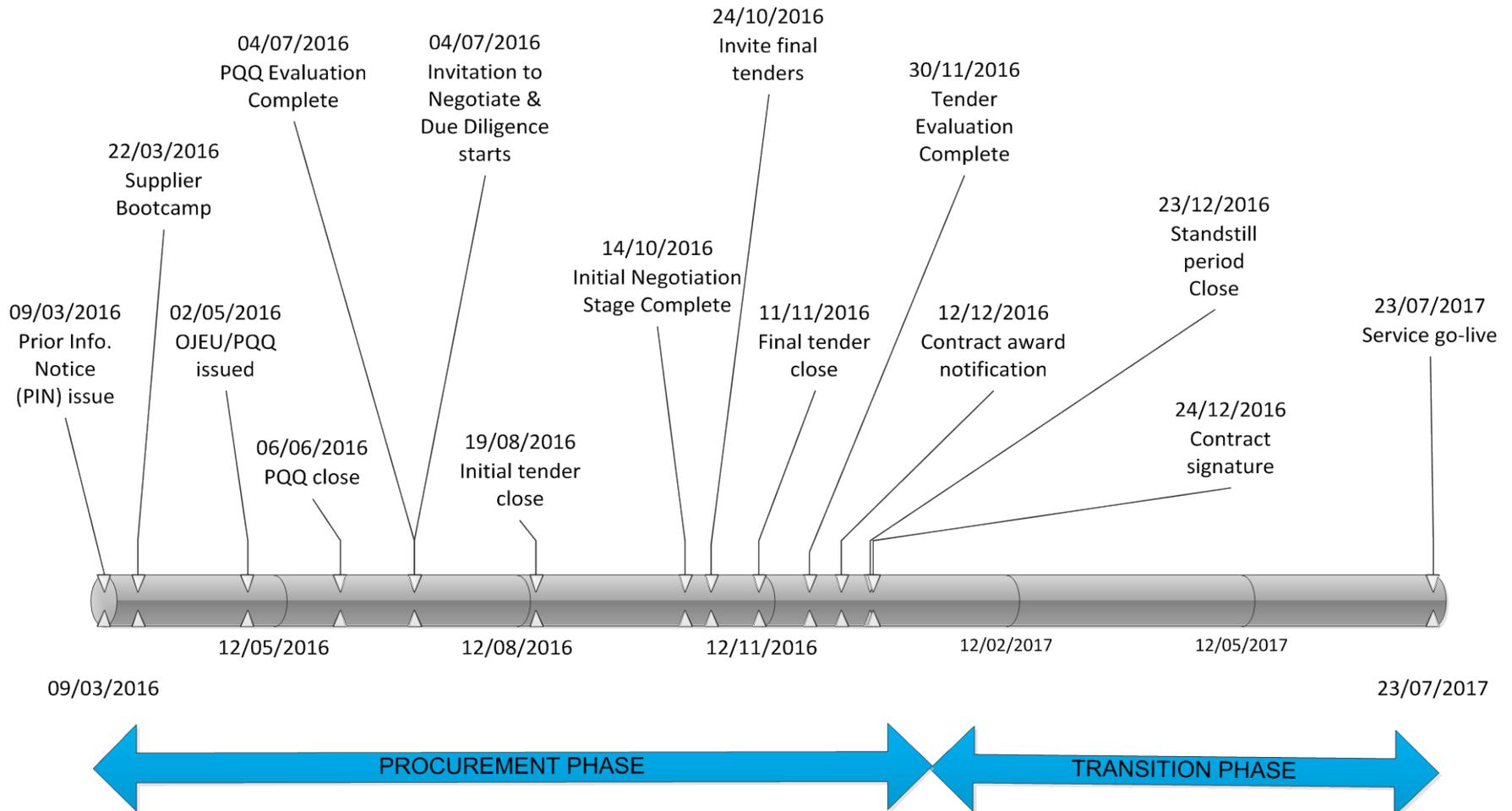
- BravoSolutions e-tendering solution – NHSBSA web portal
- Web address:  
[https://nhsbsa.bravosolution.co.uk/web/login.shtml?\\_ncp=1354702336254.72776-1](https://nhsbsa.bravosolution.co.uk/web/login.shtml?_ncp=1354702336254.72776-1)

## 4. Clarification process

# Procurement Communication and Information

The screenshot shows a web browser window displaying the NHS Business Services Authority eTendering Service website. The browser's address bar shows the URL: [https://nhsbsa.bravosolution.co.uk/web/login.shtml?\\_ncp=1354702336254.72776-1](https://nhsbsa.bravosolution.co.uk/web/login.shtml?_ncp=1354702336254.72776-1). The page features a blue header with the text "Home" and "NHS Business Services Authority eTendering Service". Below the header, there is a "REGISTER OR LOGIN" section with input fields for "username" and "password", and a "GO" button. To the right of the registration form, there is a "Welcome to the NHS Business Services Authority eTendering Service" section. This section includes a paragraph describing the service, a link to "Useful Information", and a section titled "Opportunities" with three links: "View current opportunities and notices", "View past opportunities and notices", and "View current pan-government advertised opportunities". At the bottom of the page, there is a "eTENDERING HELPDESK" section with contact information: "Need assistance? Please contact our eTendering helpdesk: Phone: 0800 368 4850 E-mail: help@bravosolution.co.uk". The Windows taskbar at the bottom shows the system tray with the date and time: 14:42 17/09/2015.

# Indicative Procurement timeline



## Individual supplier sessions

- Duration: 1 hour
  - 45 minutes for question and answer; and
  - 15 minutes for wash-up.
- There will be detailed notes taken from each individual supplier session by the NHSBSA, and the key themes and principles will be included in the report to be drafted and shared with all interested parties.
- Within the report all questions and answers will be anonymised in the interest of the participants.

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**Any questions?**

# Closing Remarks