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**Invitation to Tender  
and  
Specification**

**A User Led Approach to Developing Social Care Data Standards  
and Data Sharing Use Cases in Wales**

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## Section 1 – General Information

### 1.1 Social Care Wales

Background information on the work Social Care Wales undertake can be found on our website <https://socialcare.wales/about>.

The social care sector covers many areas and activities and therefore to help better explain what 'social care' really means we've created two short and simple videos - [New video resources to help building a better understanding of social care in Wales - Social Care Wales - Research, Data & Innovation](#)

### 1.2 Procurement Procedure

We intend to conduct this procurement using an **Open Procedure**, in accordance with the Procurement Act 2023, the Wales Procurement Policy Statement (WPPS) and Social Partnership and Public Procurement (Wales) (SPPP) Act 2023.

### 1.3 Purpose of this Tender

We are seeking a suitably skilled and experienced supplier to define and deliver a user-led approach to developing Minimum Operating Data Standards (MODS) for social care in Wales. This will involve deep engagement with stakeholders, identification and prioritisation of use cases, and development of a structured Data Catalogue to inform the Fast Healthcare Interoperability Resource (FHIR) framework.

This contract will be split across the following phases:

Phase 1: Engagement and Discovery

Phase 2: Further Development and Implementation

Note: Social Care Wales will commission FHIR expertise through a separate contract. While both the successful supplier of this tender and the FHIR experts will have distinct areas of responsibility, they will be expected to work in close collaboration to ensure alignment between the development of the MODS and its mapping to the HL7 FHIR framework. This joint approach will ensure that technical compatibility is built in from the outset and that both strands of work progress in a coordinated, efficient manner.

### 1.4 Budget

Phase 1 - There is a budget of £250,000 (inclusive of any applicable VAT) agreed.

Phase 2 - The budget is yet to be confirmed; however, suppliers are asked to provide indicative pricing for information only.

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The Supplier will provide full financial breakdown of the costs associated with the project for consideration through the evaluation process.

Prices must be quoted in pounds sterling and clearly state if VAT will or will not be charged.

### **1.5 Duration**

Phase 1 – Will run from 10 November 2025 until 31 March 2026, with a possibility of being extended into Phase 2.

Phase 2 – If extended, will run for a further 12 months from 1 April 2026 – 31 March 2027, up to a total contract period of 16.5 months.

### **1.6 Monitoring**

The Supplier's performance under the terms of the contract will be reviewed by a named project manager on behalf of Social Care Wales. Performance will be measured against the specification and delivery timescales, with quality control measures agreed as part of the contract.

### **1.7 Consortium / Joint Bids**

Response to this ITT from consortia, must include:

- Full details of the consortium members
- Names of personnel of assigned for the delivery of the Contract, including which elements of the Contract such consortium members / personnel (as the case may be) are assigned to deliver

### **1.8 Complementary documents**

The following documents are attached to this Invitation to Tender (ITT)

- Appendix 1 – Pre-Qualification Questionnaire (PQQ)
- Appendix 2 – Technical / Quality Response Document
- Appendix 3 – Financial / Pricing Response Document
- Appendix 4 – Social Care Wales's Tone of Voice Guidelines
- Appendix 5 – Social Care Wales's Branding Guidelines
- Appendix 6 – Form of Tender
- Appendix 7 – A strategic approach to social care data in Wales - Discovery Report
- Appendix 8 – Statement of Strategic Intent for social care data in Wales
- Appendix 9 – [Social Care Data Maturity Assessment: National Report for Wales \(Recommendations\)](#)

## Section 2 – Project Outline

### 2.1 Introduction

Social Care Wales are a Welsh Government sponsored body who regulate and develop the social care workforce, improve care and support and increase public confidence in social care in Wales. As part of its improvement function, Social Care Wales manages the strategic approach to social care data in Wales which aims to improve the way that social care is able to more effectively use the data it collects in the process of delivering care and support.

Social care in Wales is delivered in a mixed economy of 22 local authorities and commissioned services made up of approximately 1,200 commercial, third sector and not for profit organisations. Most people have their care and support managed by local authorities, but a significant minority in Wales also self-fund their care or manage their care through a direct payment. Over 80,000 people work in social care across Wales making it one of Wales's biggest employers.

At Social Care Wales we recognise the ever-growing role of technology in delivering social care in Wales. The [data and digital strategy for health and social care in Wales](#) articulates Welsh Government's desire to develop digital and data capabilities that will help to deliver its transformation ambitions set out in '[A Healthier Wales](#)'.

### 2.2 Background

A key digital and data programme for health and social care in Wales is the [National Data Resource \(NDR\)](#). This programme is designed to bring together health and social care data from a number of source systems so that it can be made available to the right professionals at the right time. This leads to improved decision making and better healthcare, and care and support. The NDR is hosted in the Google Cloud Platform and has been developed to contain a range of additional benefits such as curating and anonymising data for research within a Trusted Research Environment (TRE) and making anonymous data available to organisations to be able to conduct advanced analytics with the latest tools and technologies in the National Data and Analytics Platform. Social Care Wales is a key federated partner in the NDR programme and is committed to delivering the aims and objectives of the programme.

Allied to the NDR is the Connecting Care programme. This workstream is a major digital transformation programme in Wales designed to improve how health and social care services share and manage information. Over the next 18 months this programme will seek to replace the current WCCIS electronic information system in use in local authorities and community health settings with the next generation of electronic information systems. Connecting Care will also enable Integrated Care Records which bring information from a variety of sources around the person so that professionals can see the services a person is receiving and access important information.

Leaders in health and care understand that data can play a fundamental part in improving the quality and outcomes of health and social care in Wales. Ready

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access and availability of data is key to this. The NDR and Connecting Care will make people's health and social care data easier to access and analyse in a safe and ethical manner. Better data, means better decisions, and in turn better care and support.

Social Care Wales is committed to human centred approaches of developing our digital and data products. We believe practitioners of social care should be at the core of these developments as they will know which data should be portable, when it should be shared, and with whom. They will also know which data would be most beneficial to surface from health systems to enable better decision making and better care and support.

Social Care Wales is already engaged with colleagues from the four UK nations focused on the standardisation of social care data and FHIR. While we recognise some of the structural and legislative differences in how social care is delivered in each nation, this project aims to ensure that data standards are as compatible and portable as possible across borders.

Colleagues from other nations will be invited to participate in this project given our collective ambition to create data standards that allow data to move across not just organisational boundaries but potentially geographic boundaries too.

Much of the data in scope for this work is already captured digitally, primarily by local authorities using electronic information systems (EIS) that local authorities started to use in the early 2000s. The independent sector will be more of a challenge. Many social care organisations are not digitally enabled and do not currently use digital tools to manage their data. Part of the broader programmes (e.g., Connecting Care and NDR) will focus on enabling these organisations to adopt digital systems, supporting the overall goal of consistent, interoperable and portable data across the entirety of health and care.

### **2.3 Relationship with Other Work**

This commission is closely related to another of Social Care Wales's contracts: *"Provision of FHIR Consultancy, Development, Resources and Training for Social Care in Wales."*

The focus of the present commission is to take a user-led approach to developing non-technical social care data standards and data sharing use cases in Wales through engagement with practitioners and stakeholders. The supplier will co-design use cases, identify priority areas, and shape non-technical data standards that reflect both current and proposed future needs.

While this commission will not directly deliver the technical outputs (FHIR standards), it will provide the essential foundation for that work. The successful supplier will generate and prioritise use cases, produce a non-technical catalogue of Minimum Operating Data Standards (MODS), and establish governance mechanisms to get these agreed in principle for adoption and implementation.

These outputs will be used by FHIR experts of the related contract to translate sector-led requirements into technical specifications and inclusion in the Wales Core FHIR profile as social care FHIR standards.

## **2.4 Aims and Objectives**

### 2.4.1 Aims

The **overall aim** of this contract is to build a Data Catalogue that contains Minimum Operating Data Standards (MODS) for social care in Wales that are practitioner led, prioritised by use case, and nationally agreed as suitable for adoption by social care in Wales. Data standards allow data to be more easily shared using frameworks that can take these non-technical descriptions of data and turn them into technical standards that enable systems to exchange data. This enables access to the right data at the right time empowering better decision making, improved care, and better outcomes across the health and social care system in Wales.

The **aim of Phase 1** is to conduct an in-depth discovery and co-design process with the social care sector to establish the foundational artefacts, governance structures, and stakeholder consensus required to develop and implement MODS. This phase will involve securing intent from key organisations that they support the approach, will commit staff time to engage in the process and agree in principle to adopt standards for use in their systems in future.

The **aim of Phase 2** is to reach consensus upon, further develop, and implement the MODS, working as a product owner with technical experts to develop the Data Catalogue into FHIR standards, ensuring they fully reflect the agreed non-technical definition as a FHIR standard, and are able to be fully integrated into national data infrastructure and the NDR. This phase will deal with more standards, following established governance processes designed in phase one and allow longer timescales to obtain consensus or agreement on any difficult or contentious standards.

### 2.4.2 Objectives

The **objectives** of this contract are to deliver a co-produced, standards-based data infrastructure for social care that:

- Identifies and prioritises high-value use cases for data sharing.
- Defines and standardises key data elements across adult, children's and workforce domains.
- Aligns social care data with the NDR and FHIR interoperability frameworks.
- Embeds ethical governance and sustainable sector ownership.
- Supports front-line practitioners and provides in navigating and using data effectively.

The **objectives of Phase 1** are to:

- Engage with social care providers across Wales to understand current data sharing use cases and develop the potential for increased sharing of information across organisational boundaries.



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- Work with Social Care Wales to develop meaningful participatory processes for ensuring that standards are designed for, and are inclusive of, a range of social care professionals across the sector in Wales.
- To work with partners to develop a robust process to consider, converse and obtain consensus on data standards that can be included in MODS for social care.
- Create a Statement of Intent that allows social care organisations to become signatories to the development, delivery and adoption of a standardised approach to social care data in Wales.
- Develop a strong governance structure including necessary processes for escalation, resolving disagreements and final decision, ensuring that all the appropriate agencies are represented, e.g. ADSS Cymru, WLGA, Care Inspectorate Wales (CIW), Social Care Wales etc.
- Work closely with Social Care Wales's communications team to create content and resources to encourage involvement in the project, and to also update stakeholders on progress.
- Work with FHIR experts to ensure that basic data elements (e.g. demographic data) which are already a part of the UK (Wales) Core R4 FHIR profile can be considered for adoption in other UK nation's profiles. These may require explaining technical concepts in plain language to ensure successful translation of non-technical standards into the FHIR standard.
- Build a Data Catalogue for social care in Wales that contains the data elements that have been standardised and approved for inclusion through the process of consultation and consensus as described above.

The **objectives of Phase 2** are to:

- Create and deliver a plan for the continuation and completion of Phase 1 by developing the Data Catalogue to contain all the standards necessary to fulfil a Minimum Operating Data Standard (MODS) for social care in Wales.
- Work with Social Care Wales to ensure that our proposed Data Catalogue is inclusive of all user needs across the social care sector in Wales. Certify that a broad range of providers, professions and subject matter experts have been consulted to create a MODS that will serve the data sharing needs of the sector now and for the perceived future.
- Ensure that difficult to reach parts of the sector; professions, role types, providers, stakeholders etc., have been encouraged to connect and engage with us when developing MODS. Ensure that no areas of the social care sector are considered less favourably than others.
- Deal with areas of contention, where differences have meant that consensus is yet to be agreed. Use all processes within the governance structure to ensure that we can adopt standards that have been deemed necessary during the discovery process.

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- Work with FHIR experts to ensure that the fully formed MODS can be developed within the FHIR Framework for Wales, working with partners across the 4 UK nations (England, Scotland, Wales, and Northern Ireland) to preserve as much cross-border compatibility as possible.
- Work with suppliers of Electronic Information Systems (EIS) for social care in Wales to ensure their products can adopt and support the MODS and FHIR Standards.

### **2.5 What is required / 'The Requirements' – Phase 1**

For Phase 1 of this contract, we are seeking to commission a suitably qualified and experienced supplier to undertake a comprehensive assessment of data currently shared across the social care sector.

The work will involve discovery via direct engagement with key stakeholders, identification of current and future data needs, and development of a standardised dataset catalogue. The standards will be thoroughly discussed, tested and validated with stakeholders to obtain consensus on meaning and definition before being written into the catalogue as an agreed standard.

The supplier will then work with Social Care Wales and separately commissioned FHIR experts to document the results as MODS for children's, adults and the social care workforce, and include these on the FHIR framework.

#### **2.5.1 Deliver Stakeholder Engagement and Discovery**

- Undertake inclusive widespread engagement with social care stakeholders including front line practitioners, service managers, data specialists, and representative bodies across Wales to identify what data is currently collected, used, and shared across the social care sector.
- Social Care Wales will support the successful supplier to identify a representative sample of organisations across the Welsh social care sector.
- Gain an understanding of how this data is used, by whom, and for what purpose.
- Explore what data may be needed in the future to meet evolving sector priorities and policy requirements.
- Identify gaps, inconsistencies, or redundancies in the current data landscape.
- Document current challenges in data sharing and identify barriers to technology, governance, or capability.
- Produce stakeholder personas and an analysis of data challenges, expectations and needs.
- Ensure engagement covers diverse settings e.g. rural/urban, Welsh/English speakers, public/private/voluntary sectors.

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- Facilitate engagement in a way that is inclusive, non-technical, system agnostic manner focused on practitioner needs.
- Produce a stakeholder engagement summary report including:
  - Stakeholders engaged with;
  - Engagement methods used;
  - Key themes, needs, pain points and priorities identified;
  - Observations on variation in data use across different settings;
  - Feedback on current data collection/sharing practices;
  - Insights on willingness and capacity to engage in future standardisation.
- Evaluate existing processes for maintaining and updating standards such as the Wales Informatics Standards Board (WISB), The Professional Records Standards Authority (PRSB), Interweave (Humber and NE England), NHS England MODS and consider how they could be applied or adapted for social care standards in Wales.

### **2.5.2 Identification of Cross-Boundary Data Sharing Use Cases**

- Map current examples where data is being shared between any of the following organisations:
  - Local authorities
  - Regulated care providers
  - Health services (NHS)
  - Health services (Private)
  - Third sector organisations providing care or support for carers
  - Voluntary, community and social enterprise (VCSE) organisations
  - Central government departments or regulators
  - Other notable organisations not included above
- Gain understanding of the purpose, benefits, and challenges associated with each use case, as well as the current mechanisms for sharing.
- Gain understanding of the current potential for organisations being able to accept data via electronic data exchange, e.g. local authority social services to residential care homes.
- Explore potential or anticipated future scenarios where enhanced data sharing will be required, such as:
  - Integrated care records and population health management;
  - Multi-agency teams (e.g. housing, education, criminal justice etc.);
  - Seamless public services;

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- Smart devices, IoT, assistive technologies etc.;
- Develop a Use Case Register, to include items such as;
  - Title and description
  - Purpose and objective
  - Stakeholders involved
  - Legal considerations (fair use, legal basis etc.)
  - Data standards or interoperability requirements
  - Frequency, format, and methods of exchange
  - Perceived benefits and risks (with mitigations)
  - Current status
  - Links to any relevant legislation or other strategic initiatives
  - Date last updated
  - Contact point or owner
- The successful supplier will work with stakeholders to determine the necessity of sharing the data for each use case (whether current or proposed), in turn providing an order or prioritisation.

### **2.5.3 Development of Meaningful Participatory Approaches & a Robust Governance Structure**

- Work in line with human-centred, participatory design principles.
- Collaborate with Social Care Wales to develop a design process for data standards that is:
  - Inclusive
  - Transparent
  - Sustainable
  - Understandable
  - Outcome-focused
- Develop and support strong, effective governance processes for data standards in social care.
- Ensure governance has clear leadership and recognisable lines of accountability.
- Develop a functional governance process that enables:
  - Efficient and effective development of standards
  - Capacity to address lack of consensus or disagreements

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- Processes for arbitration and final decision-making on:
  - Individual standards or sets of standards
  - Language choices
  - Any other matter requiring sector agreement to progress the project

### **2.5.4 Development of a Project Communication and Engagement Plan**

- Develop a comprehensive communication and engagement plan for the project.
- Deliver the plan in collaboration with Social Care Wales' Marketing and Communications team.
- Ensure the plan includes regular and routine communications throughout the project.
- Adoption of the standard is voluntary and therefore the successful supplier should design regular communications to persuade organisations to become signatories to the Statement of Intent, encouraging uptake across social care in Wales.
- Design communications to:
  - Involve a wide range of participants to increase early buy-in
  - Keep people informed with accurate, first-hand information
  - Build trust through established feedback channels and two-way communication
  - Provide a central place for additional information for interested individuals
  - Demonstrate transparency and openness in the work

### **2.5.5 Produce of a Statement of Intent**

- Work with all relevant parties to co-produce a Statement of Intent.
- Ensure the Statement of Intent is clear, benefits-focused, and easy for organisations to sign up to.
- Use the Statement of Intent to:
  - Demonstrate strategic alignment with the project's purpose
  - Set the tone for collaboration and joint working
  - Strengthen partnerships and stakeholder confidence in delivering meaningful outcomes for health and social care
  - Establish aims, objectives, and expectations

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- Act as a lever to encourage wider adoption of its principles
- Allow social care providers and organisations to sign up to these principles agreeing in principle to work with their Electronic Information Systems suppliers towards adopting the MODS in their digital solutions that support social care.

### **2.5.6 Develop a Prototype Data Catalogue**

- Work closely with stakeholders to co-produce a structured and prioritised prototype Data Catalogue in line with industry best practice.
- Identify all data elements proposed for inclusion in a future Minimum Operating Data Standard (MODS) for:
  - Adult social care
  - Children's social care
  - The social care workforce
  - Integrated Care Record<sup>1</sup> (data requirements for social care)
- Ensure the Data Catalogue is:
  - Robust enough to support technical translation
  - Clear, understandable, and accessible for circulation and review across the sector
- Structure the catalogue so that:
  - It is available in a digital format and accessible online by any stakeholder as a readable document that complies with WCAG 2.2 AA standards.
  - Can be edited online by select individuals.
  - Is available in Welsh and English and checked to ensure that their definitions are unambiguous and fully align.
  - Individual standards can be circulated for feedback
  - The collection of standards forms the complete Data Catalogue

### **2.5.7 FHIR Mapping and Collaboration with FHIR Experts**

- Work in close collaboration with our commissioned and internal FHIR experts to map each relevant MODS data element to the appropriate HL7 FHIR resources and profiles.
- Ensure that MODS are:

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<sup>1</sup> <https://dhcw.nhs.wales/product-directory/our-digital-services/connecting-care/integrated-care-record/>

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- FHIR-compatible and aligned with established health data exchange practices.
- Contain sufficient detail to be translated into a technical standard in the Wales Core FHIR Profile.
- Collaborate with the FHIR team to identify and reuse existing UK Core Framework standards related to:
  - Demographic data about people
  - Descriptors of places and services
- Ensure existing generic standards are actively considered by stakeholders to avoid duplication.
- Note: The supplier will not be responsible for developing the FHIR profiles that can be published or maintained — this will be undertaken by the FHIR experts.

### **2.5.8 User-Centred Design Expertise**

- The successful supplier must demonstrate experience in user-centred design, participatory design, or human-centred design processes, particularly in user-research, persona development, service design, stakeholder engagement.
- Social Care Wales has been building internal capacity in user-centred design but does not currently have sufficient internal resources to lead this work independently.
- The successful supplier is expected to bring the necessary skills and expertise to ensure that user journeys and pain points are correctly mapped and that outputs reflect real-world front-line needs.
- Where appropriate, the successful supplier should leverage examples and insights from their own UCD work adapting these to the Welsh social care context.
- Collaboration with stakeholders is expected throughout the design process to align outputs with organisational priorities and ensure practical applicability

### **2.5.9 Reporting**

- Deliver two key reports to ensure MODS and the wider data sharing infrastructure are practical, implementable, and usable in front-line social care:
  - Phase 1 Summary Report – Focused on how data sharing can be made easier and more navigable for front-line staff, supported by case studies and stakeholder engagement.

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- Phase 2 Readiness Report – Evaluating the sector’s capacity, challenges, and enablers for adopting MODS and cross-boundary data sharing practices.
- Final reports must be provided bilingually in both English and Welsh, at the supplier’s expense.

### **2.6 What is required / ‘The Requirements’ – Phase 2**

Phase 2 will be subject to funding, the successful completion of Phase 1, and the agreement to extend the contract.

Social Care Wales intends to engage the successful supplier from this tender to undertake Phase 2, subject to negotiation and agreement of final costs.

The budget is yet to be confirmed for Phase 2, however, suppliers are asked to provide indicative pricing within their bid for information only.

Social Care Wales reserves the right to:

- Seek clarification or refinement of indicative costs for Phase 2;
- Re-negotiate scope and pricing for Phase 2, based on lessons learnt in Phase 1;
- Re-tender Phase 2 in whole or in part if final costs are not considered fair, proportionate, or aligned with the budget and procurement principles.

During Phase 2, the successful supplier will be required to:

- Create and deliver a detailed plan for the continuation and completion of Phase 1, including development of the Data Catalogue to contain all standards necessary to complete the Minimum Operating Data Standard (MODS) for social care in Wales.
- Develop outline proposals for architecture in line with both the requirements of the sector and the established NDR architecture. Technical capacity will be available to assist the successful supplier on an advisory basis
- Work in close collaboration with Social Care Wales to ensure that the proposed Data Catalogue reflects the needs of all user groups across the social care sector in Wales, ensuring that a broad range of providers, professions, and subject matter experts are consulted and engaged in the development process.
- Design and deliver targeted engagement activities to encourage participation from hard-to-reach or less represented parts of the sector (including specific professions, role types, providers, and stakeholders), ensuring that no segment of the sector is disadvantaged or overlooked in the development of MODS.



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- Address areas where consensus has not been reached by applying all agreed processes within the governance structure, ensuring that necessary standards identified during discovery are adopted in a transparent and agreed manner.
- Work with the separately appointed FHIR experts to ensure the fully developed MODS is compatible with the FHIR Framework for Wales, and to collaborate with partners across the four UK nations to maximise cross-border interoperability.
- Liaise with suppliers of Electronic Information Systems (EIS) used in social care in Wales to ensure their products can adopt and support both MODS and the relevant FHIR standards.

### **2.7 Digital, Data and Technology Requirements**

The successful supplier must be able to demonstrate:

- broad experience of leading large-scale change in digital, data and technology;
- expertise and experience of leading rapid engagement and discovery across a complex environment;
- strong experience in data standards and interoperability;
- experience in human centred design;
- the ability to convey complex concepts in plain language;
- a strong understanding of data standards and interoperability in health and social care, including reference to the policy context in Wales;
- an understanding of existing technical standards in health and care (SNOMED CT, FHIR, PRSB etc.);
- demonstrable experience of working in regulated environments;
- familiarity with data quality frameworks and assurance processes;
- an ability to support the project in terms of data modelling, terminology and metadata management.

### **2.8 Bilingual Requirements**

All final approved outputs, including all data collection tools, external communications and engagement (e.g. recruitment tools) and final reports, must be made available in both Welsh and English at the Supplier's expense, in accordance with the standards outlined in section 5.1.

Suppliers must cost for translation within their financial response – Appendix 3.

### **2.9 Accessibility Requirements**

The successful supplier must ensure any content shared with stakeholders as part of the engagement process meets the accessibility needs of the audience.

This includes (but is not limited to):

- Slide decks that are screen-reader friendly
- Use of alt text for images and graphics
- Clear font choices and contrast colours

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- Use of clear and simple language in both audio and visual elements
- Captions or transcripts for videos
- Engagement sessions appropriate for British Sign Language users

All outputs must be compliant with the WCAG 2.2 AA standards.

### **2.10 Method**

To be proposed within bids. Suppliers must outline the reasons for selecting their chosen methodology and how this fulfils the requirements of this specification within their quality response.

### **2.11 Outputs**

#### 2.11.1 Phase 1

The successful supplier will:

1. Produce stakeholder engagement summary report
2. Develop a Use Case Register
3. Develop a functional project governance process
4. Develop a comprehensive project communication and engagement plan
5. Produce a Statement of Intent
6. Co-produce a structured and prioritised prototype Data Catalogue
7. Produce the first development phase of Minimum Operating Data Standards (MODS) for adult social care, children's social care, the social care workforce and Integrated Care Record<sup>2</sup>
8. Collaborate with FHIR experts to map each relevant MODS data element to the appropriate HL7 FHIR resources and profiles.
9. Produce a Phase 1 summary report
10. Produce a Phase 2 readiness report

#### 2.11.2 Phase 2:

The successful supplier will:

1. Develop a delivery plan for the next phase of implementing data standards across social care in Wales
2. Continue to engage with social care partners in the wider independent sector to understand their data requirements and digital capabilities to facilitate electronic data transfer, ensuring that hard to reach providers and professions are included in our work on developing data standards.
3. Collaborate with social care systems providers in Wales to develop plans for adopting the MODS and FHIR standards into their digital solutions.
4. Produce final Minimum Operational Data Standards (MODS) for adults' and children's social care that is agreed and endorsed by key social care partners including ADSS, WLGA, and CIW.

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<sup>2</sup> <https://dhcw.nhs.wales/product-directory/our-digital-services/connecting-care/integrated-care-record/>

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## **2.12 Preliminary Market Engagement**

The following preliminary market engagement has taken place in relation to this requirement, prior to the publication of the Tender Notice:

Sell2Wales UK2 Notice ID - AUG533466

Session 1 – remote via MS Teams at 15:00 on Monday 11<sup>th</sup> August 2025

Session 2 – remote via MS Teams at 09:30 on Thursday 14<sup>th</sup> August 2025

The outcome of the preliminary market engagement was a refinement of this specification, with slight adaptations made to ensure that all areas of enquiry identified during the engagement process were fully addressed. These adjustments were incorporated to improve clarity, remove ambiguity, and ensure the requirements are as complete, precise, and actionable as possible for potential suppliers.

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## **Section 3 – Procurement Process: Key Stages**

To ensure all Suppliers receive equal and fair consideration, it is essential that responses are provided in the specified format and order. Suppliers should carefully follow all instructions and include all requested information.

If there is any uncertainty about what is required or difficulty in providing the requested information, Suppliers should refer to the clarification process outlined in Section 3.2 and seek guidance accordingly.

### **3.1 Procurement Process Timeline**

The target timeline for the procurement process is as follows:

	<b>Milestone</b>	<b>Date</b>
1	Publish Tender Notice and Tender Documents on Sell2Wales	9 September 2025
2	Clarification Portal Closes on Sell2Wales	17:00, 26 September 2025
3	Tender Submission Deadline	12 noon, 7 October 2025
4	Assessment of WPSQs	7 October 2025
5	Individual Stakeholder Tender Evaluation	7 – 15 October 2025
6	Stakeholder Consensus Tender Evaluation	16 October 2025
7	Preferred Supplier Selection, Internal Reporting / Sign-Off	20 – 29 October 2025
8	Notify Suppliers, and Issue Supplier Assessment Summaries	29 October 2025
9	Publication of Contract Award Notice (CAN) via Sell2Wales	29 October 2025
10	Standstill Period	29 October – 6 November 2025
11	Contract Award via Sell2Wales	7 November 2025
12	Contract Mobilisation	10 November 2025

Please note that Social Care Wales reserves the right, in its absolute discretion, to amend the timeline or extend any period in connection with the procurement process. All Supplier will be notified simultaneously of any changes to the timeline.

### **3.2 Invitation to Tender**

Tender Notice and associated tender documents will be published via Sell2Wales. Interested Suppliers must submit an electronic response to all necessary tender documents in line with the requirements outlined in section 3.4.

## **Responses may be submitted in either Welsh or English**

Should there be any system issues, the Sell2Wales technical helpline is 0800 222 9004.

### **3.3 Clarifications**

This Tender is issued on an equal basis to all Suppliers. Social Care Wales will not engage in individual discussion regarding to the Requirements, other than to respond to general clarification queries.

All requests for clarification or additional information must be submitted via the Question and Answer (Q&A) portal on Sell2Wales. The portal will be live between the dates outlined in the procurement process timeline (3.1). Following the portal closing date no further clarifications may be raised.

Social Care Wales endeavour to answer all questions as quickly as possible but cannot guarantee a specific response time.

Please note that all questions submitted via the Q&A portal on Sell2Wales will be considered as non-commercially sensitive. In accordance with the systems functionality, responses will be published anonymously on the portal and made available for all interested parties.

If a Supplier believes that a clarification request contains commercially sensitive information, or could provide a competitive advantage to other Suppliers, the query should be submitted directly to [procurement@socialcare.wales](mailto:procurement@socialcare.wales) clearly marked as 'In Confidence – Not to be Circulated to Other Suppliers'. The Supplier must provide a rationale for requesting non-disclosure.

If Social Care Wales determines that the information does not reasonably qualify as commercially sensitive, the Supplier will be notified. The Supplier may then choose too either:

- Withdraw the query, or
- Resubmit the clarification via the Q&A portal on Sell2Wales.

### **3.4 Tender Submission**

#### **3.4a Tender Submission Deadline**

Suppliers must provide an electronic tender response by submitting a full proposal via Sell2Wales by the deadline outlined in the procurement process timeline (3.1)

A full proposal consists of completion and submission of:

1. Appendix 1 - WSPQ
2. Appendix 2 – Quality Response
3. Appendix 3 – Financial Response
4. Appendix 6 – Form of Tender

## **Responses may be submitted in either Welsh or English**

### **3.4b Tender Submission Process**

Suppliers must submit their tender response in line with the following guidance.

Submission Format:

- Submissions must be provided directly within the Appendix Templates (1, 2, 3 & 6)
- Submissions must be provided in the existing template formats (Word & Excel – not PDF)
- Do not submit general marketing or promotional materials, full CVs, or any documents that are not directly relevant to the ITT.
- Do not attach additional documents (unless explicitly requested within the Quality Question), as they will not be accepted or scored
- Suppliers are required to adhere strictly to the word count limits specified in the Evaluation Criteria (4.1).
- Any information provided in excess of the stated word limits will not be considered
- Word counts include **all text**, excluding in-text tables, diagrams, graphics, citations, any footnotes directly inserted into the response field, titles, headings, and bullet points.
- Suppliers must clearly label word counts at the end of each response (e.g., "Word count: 489/500").
- Submissions must only be submitted electronically via Sell2Wales. Hard copies will not be accepted.

Language:

- Tender submissions may be made in **either Welsh or English**.

Supplier Responsibility:

- Whilst every effort has been made to give an accurate description of the requirements set out in this ITT, Suppliers are responsible for their own conclusions regarding the methods and resources needed to meet these requirements.
- Suppliers must not assume that Social Care Wales has prior knowledge of their organisation or service provision, even if they have previously worked with Social Care Wales on a current or previous contracts.
- Evaluations will be based solely on the information provided in the Supplier's response.

### **3.5 Conditions of Participation - Wales Procurement Specific Questionnaire (WPSQ) Stage**

As part of their Tender submission Suppliers must complete a WPSQ. The WPSQ is a standardised pre-qualification questionnaire which sets out the Conditions of Participation that Suppliers must meet to be eligible to participate in the procurement process.

## **Responses may be submitted in either Welsh or English**

Following the Tender submission deadline Social Care Wales will assess WPSQ responses.

Failure to meet any of the mandatory conditions and/or pass/fail questions within the WPSQ will result in the Supplier's Tender being excluded from further participation in the procurement process.

### **3.6 Tender Evaluation**

Suppliers who successfully pass the WPSQ stage will progress to the tender evaluation phase, which will be carried out by a designated stakeholder evaluation panel. This panel will always consist of a minimum of three members, selected on a case-by-case basis to ensure their roles and expertise are relevant to the specific contract requirements. Panel members may be drawn from both within and outside of Social Care Wales.

#### **3.6a Individual Stakeholder Evaluation**

Each stakeholder will independently review all submitted tenders based on the predefined evaluation criteria (see section 4). This process will ensure that every stakeholder has an opportunity to assess each proposal from their perspective, considering relevant technical, financial, and strategic factors. The individual assessments will then be compiled for further discussion and consensus.

#### **3.6b Stakeholder Consensus Evaluation Meeting**

Following the individual evaluations, a group consensus meeting will be held to discuss and align the individual assessments of all stakeholders. The aim of this meeting is to reach a consensus on the overall ranking of the tenders, ensuring that all perspectives are considered, and that the final evaluation is fair and balanced. This collaborative process will ensure transparency and equal consideration for all Suppliers.

### **3.7 Award Stage**

#### **3.7a Assessment Summaries**

Once a preferred Supplier is identified, all Suppliers that submitted a tender will be notified of the tender outcome via an Assessment Summary. Each Assessment Summary will provide information to enable each Supplier to understand why its individual tender submission was either successful or unsuccessful. They will receive feedback on their score against each award criterion and the reasons why the tender was not given the score immediately above (except where the highest score was achieved) along with their overall total score.

Unsuccessful Suppliers will also receive an explanation of why the tender was unsuccessful along with a copy of the above information provided to the most

## **Responses may be submitted in either Welsh or English**

advantageous tender and therefore successful Supplier (redacted for confidentiality where required)

Assessment Summaries will be provided at the same time to all Suppliers.

### **3.7b Contract Award Notice (CAN)**

Once a preferred Supplier is identified a Contract Award Notice (CAN) will also be published on Sell2Wales. The CAN will provide information to the market **before** a contract is awarded and only once the tenderers have been provided with their assessment summaries. Publication of the CAN will commence the standstill period.

### **3.7c Standstill Period**

Once a preferred Supplier is identified, an eight working-day Standstill Period will be observed. The standstill period provides an opportunity for any Suppliers to raise concerns or request further clarification before the final contract award is made. This is a mandatory period to ensure fairness and transparency in the process.

## **3.8 Contract Mobilisation Stage**

Upon the conclusion of the standstill period and after any necessary clarifications or challenges have been addressed, the contract will be officially awarded. A Contract Details Notice will be published on Sell2Wales, and all participating Suppliers will be notified accordingly. Once the contract award is confirmed, the Supplier will begin the process of contract mobilisation. This stage will include an inception meeting allowing contract managers / project leads to meet and commence the delivery of services as outlined in the contract. Social Care Wales and the Supplier will work collaboratively to ensure smooth and timely contract commencement.



## **Section 4 – Evaluation Stages and Award Criteria**

### **4.1 Compliance Check**

Following receipt of tenders, Social Care Wales will undertake an overall compliance check to ensure that the tenders comply with the instructions or procedural requirements set out in the Tender Notice and/or associated procurement documents. Tenders which fail to comply with the instructions or procedural requirements may be determined by Social Care Wales to be non-compliant and therefore rejected.

Social Care Wales may also disregard a tender response that contains:

- a) any caveats or any other statements or assumptions qualifying the supplier's Tender Response that are not capable of assessment in accordance with the assessment methodology; or seeks to qualify the requirements in any way.
- b) Gaps, omissions, misrepresentations, error, uncompleted sections, or changes to the format of the tender documentation provided.

### **4.2 Wales Procurement Specific Questionnaire (WPSQ)**

#### 4.2(a) Preliminary questions

Suppliers will be required to provide a response to all the preliminary questions including indicating which lots they are bidding for, if relevant. Where the requirement is divided into lots, Suppliers who fail to indicate which lots they are bidding for or who do not comply with the instructions as to how to bid in respect of the Lots, may be determined by Social Care Wales to be non-compliant and therefore excluded from the procurement.

#### 4.2(b) Core Supplier Information

Suppliers will be required to be registered on the Central Digital Platform and to provide core information in relation to their own organisation and their connected persons, as well as that of any associated persons or sub-contractors which they are relying on to satisfy the conditions of participation. Social Care Wales may disregard a tender response where the Supplier fails to provide the relevant information from the Central Digital Platform in the PDF file format requested.

Social Care Wales may also disregard a tender response from a Supplier that is not a United Kingdom Supplier or a treaty state Supplier or that intends to sub-contract the performance of all or part of the contract to a Supplier that is not a United Kingdom supplier or a treaty state Supplier.

#### 4.2(c) Exclusions and Debarment

Once the initial compliance check has been carried out, Social Care Wales will confirm that neither the Supplier nor any related persons within its corporate group, associated persons relied on to meet the conditions of participation, or proposed sub-contractors are listed in the Cabinet Office debarment list. To the extent that any such entities are listed on the debarment list, Social Care Wales will consider whether to exclude the

## **Responses may be submitted in either Welsh or English**

Supplier from participating in the procurement in accordance with its obligations under the Procurement Act 2023.

Social Care Wales will also consider, in respect of each Supplier that submitted a tender, whether the Supplier or any related persons within its corporate group, associated persons relied on to meet the conditions of participation, or proposed sub-contractors, are excluded or excludable Suppliers and will consider whether to disregard the tender submitted in accordance with its obligations under the Procurement Act 2023. If the Supplier is an excluded or excludable Supplier only by virtue of an associated person or proposed sub-contractor, Social Care Wales will notify the Supplier or its intention to disregard its tender response and provide the Supplier with reasonable opportunity to replace the associated person or sub-contractor. If as a consequence of this process Social Care Wales disregards a tender response from an excluded or excludable Supplier or is aware of an associated person or sub-contractor having been replaced, it will give notice of this fact within 30 days of its decision to the Procurement Review Unit (PRU).

### **4.3 Conditions of Participation**

Suppliers must meet all Conditions of Participation to proceed to the next stage of the evaluation process. These conditions are considered mandatory eligibility criteria and will be assessed on a pass/fail basis.

Failure to meet any of the Conditions of Participation, or to provide sufficient evidence when requested, will result in the Supplier being disqualified from further consideration in this procurement process.

An explanation of the assessment of the conditions of participation is included in Appendix 1.

### **4.4 Tenders**

In accordance with the evaluation criteria for this project, tenders will be evaluated based on the most advantageous tender (MAT) model.

Tenders will be evaluated following the award criteria and weights outlined below, producing a total score of maximum 100 points.

Tenders will be evaluated using the scoring methodologies outlined for the specific questions and/or sections detailed in Section 4.

#### **IMPORTANT:**

- Scoring a zero in relation to any scored question = Fail, resulting in disqualification
- Failure to provide a response to any of the scored questions will register a zero score = Fail, resulting in disqualification of the Supplier from the evaluation process

## Responses may be submitted in either Welsh or English

### 4.4a Evaluation Criteria

In accordance with the evaluation criteria for this tender, submissions will be evaluated using the MAT model.

The overall award criteria are weighted:

- 70% Quality
- 10% Social Value
- 20% Financial, broken down as follows:

	Word Count	Weighting
<b>Quality – using Appendix 2</b>		<b>70%</b>
<b>Q1 Expertise</b> - How will you apply your expertise and proven approaches to successfully deliver this work in a large and complex business environment? Please explain how your proposed methods will address the specific needs of this tender.	750	10%
<b>Q2 Engagement Approach</b> - What approach will you take to engaging users and stakeholders in the development of data standards? Please describe the tools, methods, and techniques you will use to capture user needs and translate them into clear, usable standards.	1,500	20%
<b>Q3 Adoption Strategies &amp; Sustainability</b> - What strategies will you adopt to maximise the acceptance, implementation, and long-term adoption of the standards across social care in Wales?	1,500	20%
<b>Q4 Welsh Social Care Context</b> - How will you ensure your approach is tailored to the context of social care in Wales, drawing on relevant insights, networks, or prior knowledge as appropriate?	1,125	15%
<b>Q5 Alignment with Policy &amp; National Priorities</b> - How will you ensure that the evolving policy context of social care delivery in Wales is actively reflected in your work, and that the standards developed remain aligned with national priorities?	1,125	15%
<b>Q6 Phase 1 Project Management &amp; Delivery</b> - What is your proposed delivery plan for Phase 1 of this work? Please outline key activities, milestones, risks, and success measures. <i>A Gantt chart or equivalent may be attached or embedded as part of this response and will not count towards your word limit.</i>	750	10%
<b>Q7 Proposed Team</b> - Please outline the team you propose to deliver this work, in what capacity they will be involved, and how will they use their skills and experience to achieve successful outcomes? Please explain the	750	10%

**Responses may be submitted in either Welsh or English**

unique value your team will bring. <i>Profile summaries will suffice; full CVs are not required.</i>		
<b>Social Value – using Appendix 2</b>		<b>10%</b>
<p><b>Q8 Social value contribution</b> – Please outline how you will deliver additional social value as part of this contract, in line with the Well-being of Future Generations (Wales) Act 2015.</p> <p>In your response, consider how you will:</p> <ul style="list-style-type: none"> <li>- Support the Welsh social care workforce and/or the digital/data skills development</li> <li>- Provide opportunities for underrepresented or disadvantaged groups</li> <li>- Promote Welsh language and cultural identity</li> <li>- Reduce environmental impact through sustainable ways of working</li> <li>- Contribute to community resilience or local economic growth.</li> </ul> <p>Please include any specific commitments or measurable actions you would undertake during the course of the contract.</p>	1,500	100%
<p><b>Financial – using Appendix 3</b></p> <p>Please provide detailed itemised costings for delivery of both Phases 1 &amp; 2, based on the aims, objectives, and deliverables outlined in this specification. Please provide a breakdown of costs, including daily or hourly rates as well as any other associated costs such as translation, travel, and subsistence.</p> <p>Phase 2 costs will not be scored but will be used for information only to assist Social Care Wales in planning and assessing potential value for money in future Phases.</p>	N/A	<b>20%</b>
Phase 1	N/A	100%
Phase 2 (indicative)	N/A	Information only
<b>Total</b>		<b>100%</b>

## Responses may be submitted in either Welsh or English

### 4.4b Scoring Methodology

Quality responses including Social Value will be assessed using the scoring methodology outlined in the scoring matrix below.

<b>Risk Level</b>	<b>Rating</b>	<b>Quality Question Evidence Assessment Description</b>	<b>Score</b>
Minimal or No Risk	<b>Excellent (Fully compliant, with some areas exceeding requirements)</b>	Submission sets out a robust solution and, in addition, provides or proposes additional value and/or elements of the solution which exceed the requirements in substance and outcomes in a manner acceptable to the Social Care Wales; provides full confidence as to the relevant ability, understanding, expertise, skills and/or resources not only to deliver the requirements, but also exceed it as described	5
Low Risk	<b>Very Good (Meets All Requirements)</b>	Submission sets out a robust solution that fully addresses and meets the requirements, with full details (and, where evidence is required or necessary, full and relevant evidence) provided to support the solution; provides full confidence as to the relevant ability, understanding, expertise, skills and/or resources to deliver the requirements	4
Moderate Risk	<b>Good (Meets Most Requirements)</b>	Submission sets out a solution that largely addresses and meets the requirements, with some detail (or, where evidence is required or necessary, some relevant evidence) provided to support the solution; minor reservations or weakness in a few areas of the solution in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements	3
High Risk	<b>Poor (Partially Meets Requirements)</b>	Weak submission which does not set out a solution that fully addresses and meets the requirements: response may be basic/minimal with little or no detail (and, where evidence is required or necessary, with insufficient evidence) provided to support the solution and demonstrate that the bidder will be able to provide the services and/or some reservations as to the bidder's solution in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements	2
Severe Risk	<b>Very Poor (Fails to Meet Most Requirements)</b>	Substantially unacceptable submission which fails in several significant areas to set out a solution that addresses and meets the	1

## Responses may be submitted in either Welsh or English

		requirements: little or no detail may (and, where evidence is required or necessary, no evidence) have been provided to support and demonstrate that the bidder will be able to provide the services and/or considerable reservations as to the bidder's proposals in respect of relevant ability, understanding, expertise, skills and/or resources to deliver the requirements.	
Critical Risk	<b>Fail (Does Not Meet Any Requirements)</b>	No response at all or insufficient information provided in the response such that the solution is totally un-assessable and/or incomprehensible.	0

### 4.4c Quality Scoring Method

Each question in the Quality Response is assigned a specific weight. These weightings are indicated next to the relevant question in the Evaluation Criteria table within section 4.4a.

The weighted score for each question is calculated using the following formula:  
 $\text{Weighted Score} = (\text{Score} \times \text{Weight}) / 5.$

After scoring each question, the weighted scores are added together to give a Quality Score. The maximum possible Quality Score is 100.

The final Total Weighted Quality Score is then calculated using this formula:  
 $\text{Total Weighted Score} = (\text{Supplier Quality Score} \times \text{Overall Quality Weighting}) / 100.$

### 4.4d Social Value Scoring Method

Each question in the Social Value Response is assigned a specific weight. These weightings are indicated next to the relevant question in the Evaluation Criteria table within section 4.4a.

The weighted score for each question is calculated using the following formula:  
 $\text{Weighted Score} = (\text{Score} \times \text{Weight}) / 5.$

After scoring each question, the weighted scores are added together to give a Social Value Score. The maximum possible Social Value Score is 100.

The final Total Weighted Social Value Score is then calculated using this formula:  
 $\text{Total Weighted Score} = (\text{Supplier Social Value Score} \times \text{Overall Social Value Weighting}) / 100.$

Suppliers will be evaluated on their commitment to delivering positive social, economic, and environmental outcomes through the delivery of the contract and beyond the core project requirements. This includes factors such as community engagement, sustainability practices, diversity and inclusion, local job creation, and environmental impact reduction.

## **Responses may be submitted in either Welsh or English**

Note – In providing a response to the Social Value questions, Suppliers are advised to consider The Well-being of Future Generations (Wales) Act 2015 and the Social Partnership and Public Procurement (Wales) (SPPP) Act 2023

### **4.4e Financial Scoring Method**

Tenders are ranked based on the total cost submitted, with the lowest cost offer receiving the maximum score of 100.

All other tender's total costs are then calculated against the lowest cost offer received using the following formula:

Financial Score = (Lowest Cost / Your Cost) x 100

The final Total Weighted Financial Score is calculated using the formula:

Total Weighted Financial Score = (Supplier Cost Score x Overall Cost Weighting) / 100

### **4.5 Final Combined Score**

The weighted scores resulting from (4.2c) Quality (4.2d) Social Value and (4.2e) Financial evaluations will be combined to provide a final weighted overall score against which tenderers will be ranked.

## **Section 5 – How we work**

### **5.1 Welsh Language**

Social Care Wales is a bilingual organisation and is with the Welsh Language Measure (Wales) 2011 Standards. In responding to the Tender, Suppliers should consider how their services would support the bilingual ethos of the organisation and compliance with Scheme and Standards.

The Supplier is required to carry out any engagement activity bilingually. It is crucial that you do not treat Welsh language materials any less favourably than you treat the English language versions.

The Supplier will manage arrangements and associated costs related to Welsh language requirements such as evaluation tools; engagement activity including consultation templates, etc.

All translations must be completed by a professional English to/from Welsh translator who is a member of Cymdeithas Cyfieithwyr Cymru. Suppliers can use the Association's website to search for translators contact details - [Homepage \(cyfieithwyr.cymru\)](http://cyfieithwyr.cymru). Social Care Wales reserve the right to have translations reworked at the Supplier's expense if the Cymdeithas Cyfieithwyr Cymru standards are not met.

### **5.2 Tone of voice**

Social Care Wales has a defined tone of voice– one that is clear, easy to understand and easy to engage with – which has been developed in line with our values and personality. This helps us to be consistent in the way we communicate with all audiences, irrespective of their backgrounds and their prior understanding of us and the work we do. All materials produced will need to use our tone of voice, plain English and Cymraeg Clir.

We reserve the right to ask you to re-write/amend the work to make sure it adheres to our tone of voice. Please see Appendix 4 for further details.

### **5.3 Branding**

Social Care Wales has a strong brand identity, and this should apply to all materials produced within the project. We expect all materials produced to have a consistent look and feel developed within our brand guidelines. It is important that anyone using them recognise that they are part of a suite of materials. Please see Appendix 5 for further details.

### **5.4 Data protection**

Social Care Wales (data controller) requires you as the contractor (data processor) to:

- only act on the written instructions of the controller.



## **Responses may be submitted in either Welsh or English**

- ensure that people processing the data are subject to a duty of confidence.
- take appropriate measures to ensure the security of processing.
- only engage sub-processors with the prior consent of the controller and under a written contract.
- assist the controller in providing subject access and allowing data subjects to exercise their rights under the GDPR.
- assist the controller in meeting its GDPR obligations in relation to the security of processing, the notification of personal data breaches and data protection impact assessments.
- delete or return all personal data to the controller as requested at the end of the contract, and
- submit to audits and inspections, provide the controller with whatever information it needs to ensure that they are both meeting their Article 28 obligations, and tell the controller immediately if it is asked to do something infringing the GDPR or other data protection law of the EU or a member state.

In addition to its contractual obligations to the controller, under the GDPR a processor also has the following direct responsibilities:

- not to use a sub-processor without the prior written authorisation of the data controller.
- to co-operate with supervisory authorities (such as the ICO).
- to ensure the security of its processing.
- to keep records of processing activities.
- to notify any personal data breaches to the data controller (by the end of the next working day) to [databreach@socialcare.wales](mailto:databreach@socialcare.wales);
- to employ a data protection officer;
- to appoint (in writing) a representative within the European Union if needed, and
- to hold an ICO certification, details of which must be declared within Appendix 1 – Pre-Qualification Questionnaire.

**Upon contract award the successful Supplier will be required to complete a GDPR Compliance Questionnaire.**

### **5.5 Accessibility**

Social Care Wales must comply with Government accessibility regulations that came into force for public bodies on 23 September 2018. These are known formally as Public Sector Bodies (Websites and Mobile Applications) (No.2) Accessibility Regulations 2018 (<https://www.gov.uk/guidance/accessibility-requirements-for-public-sector-websites-and-apps>). Suppliers are required to show how they will ensure compliance with the accessibility regulations for any work on websites and other platforms/applications.

## **Responses may be submitted in either Welsh or English**

### **5.6 Equality and Modern Slavery Acts**

Social Care Wales require our Suppliers to demonstrate their commitment to this legislation, by providing a current statement of your organisations policies with regard to these Acts.

- Equality Act 2010
- Modern Slavery Act 2015

### **5.7 Copyright / Legal Ownership**

In all instances, full copyright, Intellectual Property, and authorship of all outputs produced will be owned by Social Care Wales.

### **5.8 Cyber Security**

Unless able to apply an exemption, our contracts for major IT solutions and contracts that involve the processing and/or retention of high volume of personal data, will include a requirement for the supplier to be certified under the government-backed Cyber Essentials scheme as a minimum.

Where the contract requires the processing of high risk or large volumes of special categories of personal data (as defined within the DPA) consideration should be given to the supplier being accredited against the Cyber Essentials 'Plus' certification. The exemptions applied by Social Care Wales are:

- G-Cloud: Cloud services procured through G-Cloud are assessed against Government's Cloud Service Security Principles.
- Digital Services Framework (DSF): DSF suppliers have been technically and commercially evaluated to provide a comprehensive choice for agile projects.
- Public Sector Network (PSN): PSN services are currently accredited against the network's security standards. In the future, PSN services will be assessed against Government's Network Security Principles.
- ID Assurance Framework: Being able to provide your identity online easily, quickly and safely is recognised as a key enabler of internet use by the Government and its users. Providers of public services such as national and local governments, major internet companies, online retailers, banks and others have to address business and security issues around identity proofing and username/password fallibility to mitigate the financial and administrative implications of identity fraud and compromise of personal data.
- Assisted Digital: Assisted Digital is support for people who can't use online services independently.
- Suppliers conforming to the ISO27001 standard where the Cyber Essentials requirements, at either basic or Plus levels as appropriate, have been included in the scope, and verified as such, would be regarded as holding an equivalent standard to Cyber Essentials and Cyber Essentials Plus.

As the Cyber Essentials Scheme covers the principles of computer and internet connectivity, a number of very small organisations which have limited IT support or may use paper-based processes, will not fall under these requirements.

## **Responses may be submitted in either Welsh or English**

It is also desirable for Supplier's hold an ISO27001 certification, details of which must be declared within Appendix 1 – Pre-Qualification Questionnaire.

### **5.9 Use of Artificial Intelligence (AI)**

Supplier's must disclose any use of AI when responding to this tender, or as part of their proposed delivery of the service, within Appendix 1 - Pre-Qualification Questionnaire.

### **5.10 Social Value**

To ensure Social Care Wales maximises its impact for stakeholders through commissioning and procurement activities, we ensure we assess social value and align outcomes with the principles of the Well-Being of Future Generations (Wales) Act (2015). This approach is designed to positively contribute to the long-term well-being of Wales, promoting a more sustainable, inclusive, and prosperous future.

By adopting this approach, we not only benefit local stakeholders but also ensure that public resources are utilised efficiently to drive lasting social, economic, and environmental improvements. This enables us to deliver outcomes that support future generations and address broader societal needs, extending beyond the immediate objectives of any single contract.

**Responses may be submitted in either Welsh or English**

## **Section 6 – Conditions applying to this tender**

### **6.1 Tender submission requirements**

It is important that Tender responses provide specific evidence of an ability to meet the Requirement/s. Please do not provide general organisational literature, marketing or promotional brochures and web-links as these will not be an appropriate response, will not be considered in the evaluation process, and may prove detrimental to your Tender.

Suppliers must notify Social Care Wales immediately of any change in the information submitted in your Tender response at any time during the procurement process.

Tender responses will be checked for completeness and compliance with the instructions before responses are evaluated.

Social Care Wales reserves the right to refuse to consider your Tender if the response is incomplete or is found to be inaccurate.

All Tender responses and submissions provided may form part of any subsequent agreement or contract based upon this procurement exercise.

Social Care Wales reserves the right to require some or all Suppliers to clarify and/or expand the answers contained in their Tender submissions, in writing. Requests for further information will be made in writing to Suppliers. Failure to respond promptly or adequately may result in the Supplier's disqualification from the procurement process.

### **6.2 Costs and expenses**

Each Supplier shall be solely responsible for all the costs it incurs in the preparation and submission of its Tender, up to and including the award of the contract. This shall also cover the cost of attending any pre or post Tender meetings and/or potential interview, and should a Supplier be successful, the preparation of the contract documents.

Social Care Wales shall in no event be responsible or held liable for any such costs regardless of the conduct or outcome of the bidding process.

### **6.3 Right to reject Supplier responses**

Social Care Wales reserves the right to reject or disqualify a Supplier where:

- The Tender response is submitted late, is completed incorrectly, is materially incomplete or fails to meet Social Care Wales' Requirements, which have been notified to Suppliers.
- The Supplier or its supply chain, sub-contractors, connected persons, or associated persons are on the Debarment List. Supplier's will be given the opportunity for self-cleaning before disqualification occurs.

## **Responses may be submitted in either Welsh or English**

- The Supplier or its supply chain, sub-contractors, connected persons, or associated persons breach any of the terms and conditions of this Tender or other documents issued by Social Care Wales, and
- There is a change in identity, control, financial standing, or other factor impacting on the selection and/or evaluation process affecting the Supplier or its supply chain, sub-contractors, connected persons, or associated persons.

### **6.4 Pricing**

Appendix 3 must be utilised; prices must be quoted in pounds sterling and clearly state if VAT will or will not be charged. A clear itemised breakdown of proposed costs is required.

### **6.5 Tender updates**

Social Care Wales may issue updates, which will be identified by a number and the date. Such updates will contain details of any amendments, additions or variation to the information contained in this ITT, together with any further information, which may assist the Suppliers in the preparation of their submissions. No statements issued by Social Care Wales in relation to this or any other documents shall be deemed to form part of this tender process unless ratified by an update.

### **6.6 Conflict of interest**

Suppliers are instructed to ensure that their potential appointment to deliver the Requirement has not and will not create any conflict of interest or any situation that might compromise or prejudice Social Care Wales' duty to manage an open, fair, non-discriminatory and competitive procurement process. In the event of a conflict (or potential conflict) arising at any time during the procurement process, the affected Supplier must report the occurrence of an actual or potential conflict and the means for resolving it to Social Care Wales as soon as reasonably practicable.

Failure to declare any actual or potential conflict and/or failure to address such conflict to the reasonable satisfaction of Social Care Wales may result in a Supplier being disqualified from this procurement.

### **6.7 Confidential information**

Confidential information means all information which is supplied by Social Care Wales to a Supplier whether in writing, orally or in any other form, directly or indirectly from or pursuant to discussions with such Supplier or which is obtained through observations made by such Supplier which is designated by Social Care Wales as confidential or which is otherwise of a confidential nature.

Each Supplier shall hold in confidence any confidential information, provided that such Supplier shall not be restricted from passing such information to its professional advisers, its potential sub-contractors (subject to obtaining appropriate confidentiality agreements from them) but only to the extent necessary to enable it to prepare its bid and participate in this procurement.

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### **6.8 Copyright**

Suppliers are reminded that the copyright to this ITT rests with Social Care Wales and its appointed advisers. This ITT may not either in whole or in part be copied, reproduced, distributed, or otherwise made available to any other third party without the prior written consent of Social Care Wales except in relation to the preparation of a Tender. All documentation supplied by Social Care Wales in relation to this ITT is, and shall remain the property of Social Care Wales and must be returned on demand, without any copies being retained.

### **6.9 Canvassing**

Any Supplier who directly or indirectly canvasses any member of Social Care Wales or any of its officials or representatives concerning the award of contract for the Requirement may be disqualified.

### **6.10 Collusive submissions**

Any Supplier who:

- Fixes or adjusts its Tender rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person, or
- Communicates to any person other than Social Care Wales the amount or approximate amount of its proposed Tender (except where such disclosure is made in confidence in order to obtain quotations necessary for the preparation of the Tender for insurance or similar activity), or
- Offers or agrees to pay or give, or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender any act or omission,

Will be (without prejudice to any other civil remedies available to Social Care Wales and without prejudice to any criminal liability which such conduct by a Supplier may attract) disqualified.

The Supplier warrants that its Tender shall be bona fide and shall be intended to be competitive and that it has not done and will not do at any time any of the acts set out in this section.

### **6.11 Publicity**

No publicity regarding the procurement of the Requirement or the award of any contract will be permitted unless and until Social Care Wales has given express written consent to the relevant communication.

### **6.12 Social Care Wales' rights**

Social Care Wales reserves the right to:

- waive the requirements of this ITT.
- disqualify any Supplier that does not submit a compliant Tender response in accordance with the instructions in this ITT.

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- withdraw this ITT at any time, or to re-invite Tender responses on the same or any alternative basis, and/or
- choose not to award any contract in relation to this procurement process, and
- make whatever changes it sees fit to the timetable, structure, or content of the procurement process, depending on approvals processes or for any other reason.

### **6.13 Abnormally Low Tender**

If Social Care Wales considers that any price proposed in the Tender to be abnormally low, before disregarding and excluding the Tender, Social Care Wales shall:

- notify the Supplier that Social Care Wales considers the price to be abnormally low; and
- give the Bidder a reasonable opportunity to demonstrate that it will be able to perform the contract for the price offered.

If the Bidder demonstrates to Social Care Wales' satisfaction that it will be able to perform the contract for the price offered, Social Care Wales may not disregard and exclude the Tender.

### **6.14 Freedom of Information**

Suppliers are reminded that Social Care Wales is subject to the requirements of the FOIA and the EIR. Accordingly, Social Care Wales may be required to disclose, on request, information submitted to it by Suppliers in connection with this procurement process.

Information may be exempt from disclosure under FOIA where its disclosure would be likely to prejudice the commercial interests of any person but Social Care Wales can give no assurances as to whether or not information received from Suppliers in connection with this Open Procedure process would be disclosed in response to a request made under FOIA. In the event that such a request is received by Social Care Wales, then Social Care Wales shall, in accordance with their obligations under the Code of Practice made under section 45 FOIA, consult with any party whose interests are likely to be affected by disclosure. However, Social Care Wales shall be responsible for determining at their absolute discretion whether any such information is exempt from disclosure in accordance with the provisions of the FOIA or the EIR and whether any such information is to be disclosed in response to an information request. Accordingly, Social Care Wales cannot guarantee that any information marked "confidential" or "commercially sensitive" will not be disclosed.

Where a Bidder receives a request for information under the FOIA or the EIR during the Open Procedure process, this should be immediately passed on to Social Care Wales and the Bidder should not attempt to answer the request.

### **6.15 Central Digital Platform**

Suppliers that wish to participate in this procurement are solely responsible for ensuring that the Central Digital Platform contains complete, accurate and up-to-date information about their organisation and any associated suppliers which are relevant

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for the purposes of this procurement. Suppliers must notify Social Care Wales immediately if it is unable to register on the Central Digital Platform and/or provide accurate and up-to-date information via the Central Digital Platform.

### **6.16 Governing Law**

The laws of England and Wales (as applied in Wales) and the exclusive jurisdiction of the Courts of England and Wales sitting in Cardiff; shall apply to this Tender, the procurement process, and the Requirement generally and, subject to applicable law, any dispute, including any non-contractual dispute arising therefrom.



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## Section 7 – Conditions of Participation Assessment Details

The assessment details below set out how the conditions of participation will be assessed

### Preliminary questions

No	Description	Weighting	Evaluation
1	Name	N/A	This section is for information only and will not be assessed.
2	Unique Identifier		
3	Single Supplier or Consortium		
4	Debarment List		

### Part 1 - Confirmation of core supplier information

No	Description	Weighting	Evaluation
5	Core Supplier Information	N/A	This question is for information only and will not be assessed.

### Part 2A Associated/Connected Persons

No	Description	Weighting	Evaluation
6	Associated Persons	N/A	This section is for information only and will not be assessed.
7	CPD Registration		
8	Debarment List		

### Part 2B List of all intended sub-contractors

No	Description	Weighting	Evaluation
9	Sub-contractors	N/A	This section is for information only and will not be assessed.
10	Debarment List		

### Part 3 Procurement specific questions relating to conditions of participation

#### Financial capacity

No	Description	Weighting	Evaluation
11	Profit & Loss	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass if they can self-certify that they can provide the financial information requested. Suppliers will score a Fail if

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			they indicate that they cannot provide any of the financial information requested or fail to provide it when requested by Social Care Wales as part of due diligence. Scoring a Fail will result in the tender response being excluded from the procurement process.
12/13	Guarantor	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass if they can self-certify that the named supplier can act as guarantor and provide evidence of their economic and financial standing. Suppliers will score a Fail if they fail to name a guarantor and/or provide the information requested. Scoring a Fail will result in the tender response being excluded from the procurement process.
14	Acid-Ratio Test	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass if they can self-certify that they're ratio is equal to or greater than 1. Suppliers will score a Fail if they indicate that their ratio is less than 1. Scoring a Fail will result in the tender response being excluded from the procurement process.

### Insurance

No.	Description	Weighting	Evaluation
15	Insurance	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they indicate that they have or can commit to obtaining the required levels of insurance. Suppliers will score a Fail if they do not have or cannot commit to obtaining the required levels of insurance. Scoring a Fail will result in the tender response being excluded from the tender process. Suppliers will be required to provide evidence that the required insurance is in place before contract commencement. Failure to provide such evidence prior to contract commencement will result in the contract award being cancelled.

### Legal Capacity

No.	Description	Weighting	Evaluation
16	UK General Data Protection Regulation	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they answer 'Yes' and provide details of the technical facilities and measures in place or which will be in place by contract award which Social Care Wales (at its absolute discretion) considers as satisfactory to provide confidence in the supplier's technical ability to perform the contract. Suppliers will score a Fail where they answer 'No' or where Social Care Wales is not satisfied with the information provided.
17	Cyber Essentials Plus Certification Scheme	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Suppliers will score a Fail if they have answered 'No' or if they have answered 'Yes' but fail to provide evidence of certification when requested to do so prior to contract commencement. Scoring a Fail will result in the tender response being excluded from the tender process.
18	ICO Certification	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Suppliers will score a Fail if they have answered 'No' or if they have answered 'Yes' but fail to provide evidence of certification when requested to do so prior to contract commencement.

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			Scoring a Fail will result in the tender response being excluded from the tender process.
19	ISO27001	N/A	This question is for information only and will not be assessed.

### Technical ability

No.	Description	Weighting	Evaluation
20a-c	Relevant Experience	Pass/Fail	These questions will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Suppliers will score a Fail if they have answered 'No' or if they have answered 'Yes' but fail to provide evidence when requested to do so prior to contract commencement. Scoring a Fail will result in the tender response being excluded from the tender process.
20d	Relevant Experience	N/A	This question is for information only and will not be assessed.
20e-g	Relevant Experience	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they can provide details of at least one relevant contracts which they have delivered within the last three years; or where they provide a satisfactory explanation as to why they meet the conditions of participation despite not being able to provide details of previous contracts delivered. Suppliers will score a Fail if they cannot provide details of up to three relevant contracts or their explanation is not sufficient to satisfy Social Care Wales (at its absolute discretion) that they can meet the conditions of participation relating to technical ability to perform the contract. Scoring a Fail will result in the tender response being excluded from the tender process.
20h	Relevant Experience	N/A	This question is for information only and will not be assessed.
21	Experience of sub-contractor management	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they can provide details of the procedures they have in place to manage their supply chains and sub-contractors which Social Care Wales (at its absolute discretion) considers as satisfactory to ensure performance of the contract. Suppliers will score a Fail if they cannot provide satisfactory assurance of their supply chain / sub-contractor management. Scoring a Fail will result in the tender response being excluded from the tender process.

### Health & Safety

No.	Description	Weighting	Evaluation
22	Health and Safety management	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have provided sufficient details in relation to their management of H&S which Social Care Wales (at its absolute discretion) considers satisfactory. Suppliers will score a Fail where they have not provided sufficient details in relation to their management of H&S which Social Care Wales (at its absolute discretion) considers to be satisfactory. Scoring a Fail will result in the tender response being excluded from the tender process.

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23	Health and Safety – Enforcement Orders	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered ‘No’, or where they have answered ‘Yes’ and have provided adequate evidence of remedial action taken or changes to procedures made to prevent a reoccurrence which Social Care Wales (in its absolute discretion) considers as sufficient. Suppliers will score a Fail if they have answered ‘Yes’ and have not provided adequate evidence of remedial action taken or changes to procedures made Social Care Wales (at its absolute discretion) considers as sufficient. Scoring a Fail will result in the tender response being excluded from the tender process.
24	Health and Safety - policy	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered ‘Yes’ or ‘Not Applicable’. Suppliers will score a Fail if they have answered ‘No’ but have not provided an explanation which Social Care Wales (at its absolute discretion) considers satisfactory to explain why the supplier policy does not include the required information and/or has not been updated as required. Scoring a Fail will result in the tender response being excluded from the tender process.
25	Health and Safety – competent person	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered ‘Yes’ and provided the person’s details. Suppliers will score a Fail if they have answered ‘No’ but have not provided an explanation which Social Care Wales (at its absolute discretion) considers satisfactory as to why they do not have a nominated competent person. Scoring a Fail will result in the tender response being excluded from the tender process.

### Environmental Management

No.	Description	Weighting	Evaluation
26	Environmental Convictions	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered ‘No’ or where they have answered ‘Yes’ and provided details of the conviction and remedial actions taken which Social Care Wales (at its absolute discretion) considers to be sufficient to prevent a reoccurrence. Suppliers will score a Fail where they have answered ‘Yes’ but have failed to provide details of the conviction and remedial actions taken. Scoring a Fail will result in the tender response being excluded from the tender process
27	Environmental Policy	Information Only	This question is for information only and will not be assessed

### Quality Management

No.	Description	Weighting	Evaluation
28	Quality Management	Information Only	This section is for information only and will not be assessed

### Additional Information

No.	Description	Weighting	Evaluation
29	Conflict of Interest	Pass/Fail	This section will be assessed on a pass/ fail basis. Suppliers will score a Pass where they answer ‘No’. Suppliers will score a Fail if they answer ‘Yes’ but fail to provide details, or where

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			they answer 'Yes' and the conflict of interest cannot (at Social Care Wales's absolute discretion) be remedied.
30	Blacklisting	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Bidders will score a Fail where they have answered 'No'. Scoring a Fail will result in the tender response being excluded from the tender process.
31	Equalities training	Pass/Fail	This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Bidders will score a Fail where they have answered 'No'. Scoring a Fail will result in the tender response being excluded from the tender process.
32	Welsh Language		This question will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Bidders will score a Fail where they have answered 'No'. Scoring a Fail will result in the tender response being excluded from the tender process.
33	Use of Artificial Intelligence (AI)	Information Only	This section is for information only and will not be assessed

## Organisational policies / notices

No.	Description	Weighting	Evaluation
34	Anti-Bribery	Pass/Fail	This section will be assessed on a pass/ fail basis. Suppliers will score a Pass where they have answered 'Yes'. Suppliers will score a Fail if they have answered 'No' but have not provided an explanation which Social Care Wales (at its absolute discretion) considers satisfactory to explain why the supplier policy does not include the required information and/or has not been updated as required. Scoring a Fail will result in the tender response being excluded from the tender process.
35	Modern Slavery & Human Trafficking	Pass/Fail	
36	Privacy Notice	Pass/Fail	
37	Equality & Diversity Policy	Pass/Fail	

## Part 3A Standard questions – Confirmations

No.	Description	Weighting	Evaluation
38	Contract terms	Pass/Fail	This section will be assessed on a pass/ fail basis. Suppliers will score a Pass if have answered 'Yes' indicating their acceptance of the terms and conditions provided in the procurement documents. Suppliers will score a Fail if they have answered 'No'. Suppliers will also score a Fail if they answer 'Yes' but seek to amend the terms and conditions later

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			in the procurement process. Scoring a Fail will result in the tender response being excluded from the tender process.
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