INVITATION TO TENDER

**Data Management System – ISCF Screening and Wellbeing Service**

**Business Health Matters Project**

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| **ITT Approved:** | **13.07.2021** |
| **ITT Signed off by:** | **Paul Blythin, Operations Manager** |
| **ITT published:** | **14.07.2021** |
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You are invited to submit a quotation for the provision of a data management system comprising software, hardware, and mobile data capture software. The system will principally enable the capture, maintenance and reporting on employees of Lancashire businesses who are screened for physical and mental health issues by the Business Health Matters programme and who engage in wellbeing support programmes. It will also capture and hold data on a number of related matters (as set out later in this ITT).

*Note – The core functionality required is similar to a relatively simple Patient Administration System. However, the Business Health Matters programme does not include clinical treatment, and we do not refer to employees engaged in the programme as Patients.*

The timetable for this procurement and implementation is planned to be:

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| ITT published on Active Lancashire website: | 14.7.21 |  |
| Deadline for expression of interest & questions from suppliers: | 20.7.21 17:00 | Please submit a maximum of one A4 side on your ability to meet this specification to the contact email below. |
| Opportunity for suppliers to meet project lead for Q&A: | 21.7.21 15:00 – 17:00 |  |
| Deadline for submission of bids: | 26.7.21 17:00 |  |
| Notification of shortlisted bidders: | 28.7.21 |  |
| Interview of shortlisted bidders: | 30.7.21 |  |
| Notification of preferred supplier: | 4.8.21 |  |
| Provision of detail require for (virtual) Conference Room Pilot testing of system by Business Health Matters: | 9.8.21 |  |
| Conference Room Pilot (CRP): | 12.8.21 |  |
| Confirmation of contract: | 18.8.21 |  |
| System final configuration and testing: | 19.8.21 – 7.9.21 |  |
| User training: | 9/10/13/14.9.21 |  |
| System goes live: | 15.9.21 |  |

## Applications are invited from suitably qualified and experienced organisations for the supply of services that meet the relevant standards as detailed in this tender proposal. It is essential to comply with the following instructions in the preparation and submission of your quotation. We reserve the right to reject a quotation that does not fully comply with these instructions.

Your quotation must be completed in English and a signed copy must be submitted **no later than 26th July 2021 at 5pm** (electronic signatures will be accepted)**.** All quotations mustbedelivered to the email address below.

## If for any reason you are unable to submit a quotation, then the officer named below should be contacted either in writing or alternatively by e-mail:

## **Name:** Gemma Fisk, Project Manager

**Address:** Active Lancashire Ltd, Offices 3 and 4, Farington House, Centurion Way, Lancashire Business Park, Leyland, Lancashire, PR26 6TW

## **Email:** gfisk@activelancashire.org.uk **Tel:** 01772 299830

### Your quotation must be completed in full and where necessary signed and dated. Failure to return a completed quotation will invalidate your submission.

## Any quotation submitted will be deemed to remain open for acceptance or non-acceptance for not less than 90 days from the closing date stipulated above. Active Lancashire may accept the quotation at any time within this prescribed period. Active Lancashire shall, however, not be bound to accept the lowest or any quotation.

### The standard terms and conditions of Active Lancashire together with Special Conditions will apply to all orders placed as a consequence of this process. Any Special Conditions will be set out in this tender proposal.

### **Should you need any clarification regarding this process or any of the information contained in this document, please contact the officer named above.**

## **BACKGROUND INFORMATION**

Active Lancashire Ltd is the strategic lead for sport and physical activity in Lancashire. Our goal is to embed sport and physical activity into all aspects of everyday life. As part of our work to fulfil this goal, the organisation is in the process of developing a portfolio of projects linked to Workplace Health and Wellbeing. These projects (collectively named “Business Health Matters”) will involve working in partnership with a number of organisations in order to deliver a variety of offers to workplaces.

The system to be supplied will enable staff of Active Lancashire and their partner organisations in the BHM programme to capture data on businesses, employees, screening, wellbeing support programmes, training for screeners, and screener work undertaken. Further details of the system requirement are attached in Schedule 2.

1. **SCALE OF THE PROJECT**

The system is being procured to support a three-year Industrial Research project, ending in March 2024. If the research satisfactorily demonstrates the value of the service to business customers, it will be continued into a long-term commercial phase and will be rolled out to other areas of the country as a commercial offering.

The project includes a small-scale pilot which will run in August 2021, and which will be managed using existing systems. From late September 2021 to March 2022 the next phase will include health and wellbeing screening and wellbeing planning for 1700 employees, with the follow-up offer of wellbeing services for 850, starting 4 to 6 weeks after the screening. The system being procured will need to be tested, operational and all user training complete to support the start of this phase.

In the following two years (April 2022 to March 2024), the screening and wellbeing support programme will scale up further, with 7300 screenings and 3250 wellbeing support plans delivered in the year April 2022 to March 2023, with 80% in Lancashire and 20% outside Lancashire; and 10400 screenings and 3600 wellbeing support plans in the year April 2023 to March 2024, with 70% in Lancashire and 30% outside.

If the research proves the commercial case and viability of the services, the scale of commercial delivery is expected to reach in excess of 18000 screenings and 9000 wellbeing support plans annually. There will potentially be the opportunity for the supplier to support this commercial service delivery in Lancashire, subject to a further contract. There may also be the opportunity to provide to other organisations in other parts of the UK, as part of the roll out of the model.

## **REQUIREMENTS OF THE SUPPLIER AND SYSTEM PROPOSED**

## Active Lancashire is intending to procure license for the use of an existing, mature system, that can be shown to have been used successfully by other users for similar purposes. The short timescales for implementation will not allow for development of a product beyond configuration of the existing functionality and data fields to fit the BHM requirements. Bidding suppliers will be required to demonstrate their system as part of the procurement exercise; and the preferred bidder will be required to go through a Conference Room Pilot process to test the ability of their system to configure to BHM requirements.

## The system must be accessible from existing hardware within Active Lancashire and it must be accessible from mobile technology (4G enabled tablets), using secure login for both types of access.

## The system must have the current capability to integrate with CRM systems in use within Active Lancashire. The supplier must demonstrate a current ability or commitment to integration on a wider range of systems in the future. (Active Lancashire will be upgrading or replacing CRM systems in the future).

## If the supplier is able to provide a sales based CRM system alongside the ISCF Screening and Wellbeing Service data management system, please send details of this to the officer named above. This element is not a requirement and your application will not be scored based on the ability to provide this.

## The supplier must have the capability and ambition to participate in future development of its system with other partners that may be engaged by the BHM programme.

## The supplier must have the necessary security in place to satisfy NHS requirements such that an upload link could be developed if required and resources allow, to enable information to be extracted and loaded into NHS systems.

## The supplier must have the potential to support roll out of its system outside Lancashire. This will include to Cheshire and Greater Manchester during the period of the contract, and potentially other areas of the UK after the contract end date.

## The supplier must be able to provide help desk support with technical support and troubleshooting within the contracted costs.

1. **CONTRACT MILESTONES**

In addition to the specific roles and responsibilities list above in section 2.

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| **Project Milestones** |
| The successful applicant will be required to report to the Project Manager, at quarterly project management meetings, providing written progress reports at agreed times and intervals on achievements towards project milestones for system development. These will be confirmed post contract award. |

1. **TIMESCALES**

The contract start date is 18.8.21, with a go live date of 15.9.21 (see above). The contract will expire on 31.3.24, unless extended by mutual agreement. During that time the aim is enable the BHM ISCF programme to deliver 19000 screenings, and 9500 wellbeing support programmes. The key milestones are as follows:

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| **Activity** | **Deadline** |
| Enable the data capture and reporting for up to 400 screenings, and 200 wellbeing plans and wellbeing programmes | Screenings and wellbeing plans 30.10.21 / associated Wellbeing programmes 31.1.22 |
| Enable the data capture and reporting for up to a further 2000 screenings, and 1000 wellbeing plans and wellbeing programmes | Screenings and wellbeing plans 31.3.22 / associated Wellbeing programmes 30.9.22 |
| Enable the data capture and reporting for up to a further 17000 screenings, and 8000 wellbeing plans and wellbeing programmes | All complete 31.3.24 |
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**NB - \* Applicants need to demonstrate how they are going to meet these deadlines.**

1. **SPECIAL REQUIREMENTS THAT APPLY: <THIS LIST IS INDICATIVE AND NOT EXHAUSTIVE>**

**6.1 Information Governance Requirements**

Suppliers should provide a full copy of their privacy policy alongside their tender. Suppliers should be able to demonstrate compliance with General Data Protection Regulations.

The system should offer full control on access level to users, with individual users having a defined level of access and functionality. Admin users should also be able to control access to individual data records on the system. Users below high permission levels should be unable to view customer records that their assigned user group does not work with.

The supplier should have the capability to provide 2 factor authentication to users when logging in. The system should have the ability to keep logs of access to records, including time stamped user access, changes and deletions. The supplier should be able to provide detailed user information regarding record access with time stamps and alterations.

If the supplier utilises a cloud based system, the data needs to be held within the EEA with no data transfer outside of.

If aggregated data is shared with partners, a full list of those should be provided to Active Lancashire.

The system should have the capability for, or be willing to develop, automatic archiving of users with expired consent. The system should also be able to send automatic reminders of consent expiration.

The system should be able to implement password management, with automated password expiry every 90 days, and prompt users to change this in advance. The system should not accept previously used passwords.

**6.2 Cyber Security**

The supplier should hold Cyber Essentials certification, or equivalent of, as a minimum.

The supplier should meet NHS data toolkit requirements, or be willing to work towards this.

Please provide full details of your Cyber Security policy and certifications alongside your tender application.

1. **MANAGEMENT OF THE CONTRACT**

Active Lancashire Ltd is the Accountable Body for the contract. Active Lancashire will appoint a Lead officer to oversee this appointment who will be responsible for the day-to-day management of the contract and who will manage the progress of the assignment during its lifetime. The Lead Officer for this assignment, including any questions on the specification, is Gemma Fisk, Project Manager. The contractor will be required to report to Gemma Fisk, Project Manager, weekly throughout the period prior to Go Live, and thereafter monthly, on progress against the agreed implementation plan.

## The Contractor will be required to provide **monthly consolidated invoices** quoting the official reference number raised electronically for the services.

The contract period will be 18.08.21 to 31.03.24 and will be subject to a satisfactory annual review by the Contract Manager.

Should the performance of the system fall substantially below a level acceptable to Active Lancashire, Active Lancashire reserves the right to require the Contractor to provide a detailed action plan to ensure compliance with the service requirements. Failure to comply with this provision will entitle Active Lancashire to terminate the contract.

1. **CONTRACT REVIEW PERIOD**

Active Lancashire reserves the right to negotiate variances to any agreed service schedule to ensure we meet the needs of the organisation to deliver the project contract. An annual review at the end of years 1 and 2 led by the Active Lancashire Project Manager will determine major variances to the contract schedule and specification of services to be provided.

1. **ASSESSMENT AND SCORING CRITERIA**

**Section A – Quality Questions**

**(45% in total for this Section)**

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| **1.**  **10%** | **Please provide two examples of where you have installed your proposed system in another organisation to provide services of a similar nature to this contract, and where it is currently in operation. Please include details of the organisations. (500 words maximum).** |
| **2.**  **20%** | **Please describe how your system meets the requirements set out in Schedule 3 (1200 words maximum).** |
| **3.**  **15%** | **With reference to Information Governance and Cyber Security requirements, please expand further on how you can meet these alongside what data storage systems are used and which country the data is held in or transferred to. Please provide a brief on what business continuity plans are in place in the case of data loss/damage as a result of human error/computer virus/ network failure/theft/fire/flood/ other disaster; and how quickly a backup can be provided in such an event?  Please mention what format a digital archive of data can be provided in. (1000 words maximum).** |

**Section B – Deliverability**

**(35% in total for this Section)**

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| **1.**  **20%** | **With reference to the Procurement and Implementation Timetable and Section 5 (Timescales), please provide a programme for undertaking the work detailing key tasks and activities, and confirming that the Go Live date is deliverable. Any key staff and their roles in the activities should be identified. (750 words maximum)** |
| **2.**  **15%** | **The project will potentially require holding, processing and reporting the data of 19000 participants over the next 3 years. Please provide an example of a similar scale of operation that you have supported (300 words maximum)** |

**Section C – Evaluation**

## **Quotations will be evaluated as follows:**

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| **Criteria** | **Scoring %** |
| Quality | 45% |
| Deliverability | 35% |
| Price | 20% |

Section D - Schedule of Prices

The lowest tender will receive the full allocation of 30%. The remaining tenders will receive a percentage score based on their relationship to the lowest tender using the following calculation:

Your score = Lowest submitted price x 30

Your submitted price

I/We the undersigned hereby offer to provide the goods and/or services described or referred to in the invitation to quote documentation for the following costs, inclusive of value added tax: (all costs to be quoted in pounds sterling and inclusive of V.A.T.)

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| **Service requirement** | **Direct costs** |
| 1. **Data Management System** |  |
| 1. **Other expenses (specify)**   Please provide us with details of any additional charges you would be putting forward as part of this contract. |  |
| **C. Total (A+B)** |  |
| **Total (including VAT)** |  |

Settlement Terms: …………………….. (please specify)

1. Period for which price will remain fixed (from closing date for quotes) …………………………..
2. State any other charges: ………………………………………………………………………………

I/We hereby offer to supply the above mentioned services on Active Lancashire’s Standard Conditions of Contract and Special Conditions and confirm that we have read, understood and agree to be bound by Active Lancashire’s Standard Terms and Conditions and Special Conditions for all orders placed as a result of this process.

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| **Signed** |  |
| Name (Block Capitals) |  |
| Job Title |  |
| For and on behalf of |  |

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**The following documents are attached to this ITT Document: -**

Schedule 1 – Specification for the System required