

## Order Form

In this Order Form, capitalised expressions shall have the meanings set out in Call Off Schedule 1 (Definitions), Framework Schedule 1 or the relevant Call Off Schedule in which that capitalised expression appears.

The Supplier shall supply the Goods and/or Services specified in this Order Form to the Customer on and subject to the terms of the Call Off Contract for the duration of the Call Off Period.

This Order Form should be used by Customers post running a Further Competition Procedure under the Technology Products 2 Framework Agreement ref. RM3733.

The Call Off Terms, referred to throughout this document, are available from the Crown Commercial Service website at <http://ccs-agreements.cabinetoffice.gov.uk/contracts/rm3733> and below.



RM3733 Call Off  
Contract Terms & Coi

This Order Form is issued in accordance with the provisions of the Technology Products 2 Framework Agreement RM3733.

#### Customer details

##### Customer organisation name

Care Quality Commission on behalf of Healthwatch England

##### Billing address

Your organisation's billing address - please ensure you include a postcode

Care Quality Commission, T70 Payables F175Phoenix House Topcliffe Lane, Wakefield, West Yorkshire WF3 1WE

##### Customer representative name

The name of your point of contact for this Order

##### Customer representative contact details

Email and telephone contact details for the Customer's representative

151 Buckingham Palace Road3rd Floor LondonSW1W 9SZ Tel: 020 7448 9086 Email:

#### Supplier details

##### Supplier name

The Supplier organisation name, as it appears in the Framework Agreement

Bytes Software Services Limited

##### Supplier address

Supplier's registered address

Bytes House, Randalls Way, Leatherhead, Surrey KT22 7TW Telephone: +44 1372 418747

##### Supplier representative name

The name of the Supplier point of contact for this Order

##### Supplier representative contact details

Email and telephone contact details of the supplier's representative

##### Order reference number

A unique number provided by the supplier at the time of quote

## Section B

### Overview of the requirement

#### Framework Lot under which this Order is being placed

Tick one box below as applicable

- |   |                                     |
|---|-------------------------------------|
| 1. HARDWARE                                       | <input type="checkbox"/>            |
| 2. SOFTWARE                                       | <input checked="" type="checkbox"/> |
| 3. COMBINED SOFTWARE AND HARDWARE REQUIREMENTS    | <input type="checkbox"/>            |
| 4. INFORMATION ASSURED PRODUCTS                   | <input type="checkbox"/>            |
| 5. VOLUME HARDWARE REQUIREMENTS (DIRECT FROM OEM) | <input type="checkbox"/>            |

#### Customer project reference

Please provide a project reference, this will be used in management information provided by suppliers to assist CCS with framework management

CQC ICTC 718

#### Call Off Commencement Date

The Call Off Commencement Date is the date on which the Call Off Contract is formed – this should be the date of the last signature on Section E of this Order Form

01/02/2018

#### Call Off Contract Period (Term)

A period in Months which does not exceed 60 Months (5 years) - leave blank if this is a simple transactional Goods purchase. Where established as an initial and extension period complete the fields below

14 month contract from 1st February 2018 to the 31st March 2019 with the option of a further six month extension

#### Call Off Initial Period Months

14 months

#### Call Off Extension Period (Optional) Months

6 months

#### Specific Standards or compliance requirements

Include any conformance or compliance requirements with which the Goods and/or Services must meet

See ITT statement of requirements Supplemental Provisions call off terms and conditions.

## Section C

### Customer Core Goods and/or Services Requirements

Please provide details of all Goods and/or Services required (including any items which are considered business critical) including the locations where the supplier will be required to deliver the service/s Ordered.

#### Goods and/or Services

To include where relevant Packing/Packaging

See ITT Statement of Requirements.

#### Warranty Period, if applicable

N/A

#### Location/Site(s) for Delivery

151 Buckingham Palace Road, London SW1W 9SZ.

#### Dates for Delivery of the Goods and/or the Services

**Software** List product details under each relevant heading below

#### Supplier Software

Yes.

#### Third Party Software

Yes

Include license or link in Call Off Schedule 3

#### Maintenance Agreement

Yes.

Include terms or link in Call Off Schedule 3

**Additional Clauses (see Annex 3 of Framework Schedule 4)** Tick as required

#### Alternative Clauses

Scots Law  
Or

Northern Ireland Law

Non-Crown Bodies

Non-FOIA Public  
Bodies

#### Additional Clauses

Tick one box below as applicable

A: Termed Delivery – Goods

B: Complex Delivery – Solutions  
(includes Termed Delivery – Goods)

**NB Both of the above options  
require an Implementation Plan  
which should be appended to this  
Order Form**

#### Optional Clauses

Tick any applicable boxes below

C: Due Diligence

D: Call Off Guarantee

E: NHS Coding  
Requirements

F: Continuous Improvement  
& Benchmarking

G: Customer Premises

H: Customer Property

I: MOD Additional Clauses

**Items licensed by the Customer to the Supplier (including any Customer Software, Customer Background IPR and Customer Data)**

List below

See ITT Statement of Requirements.

**Call Off Contract Charges payable by the Customer to the Supplier (including any applicable Milestone Payments and/or discount(s), but excluding VAT) and payment terms/profile including method of payment (e.g. Government Procurement Card (GPC) or BACS)**

See ITT Statement of Requirements.

**Is a Financed Purchase Agreement being used?**

Tick as required

If so, append to Call Off Schedule 2 as Annex A

**Estimated Year 1 Call Off Contract Charges (£)**

For Orders with a defined Call Off Contract Period

[Click here to enter text.](#)

## Section D

### Supplier response

Suppliers - use this section to provide any details that may be relevant in the fulfilment of the Customer Order

#### **Commercially Sensitive information**

Any information that the Supplier considers sensitive for the duration of an awarded Call Off Contract

[Click here to enter text.](#)

#### **Total contract value**

Please provide the total contract value (for the Call Off Initial Period) as detailed in your response to the Customer's statement of requirements

£14,477.10 +VAT (£17,372.52 Including VAT)

## Section E

### Call Off Contract award

This Call Off Contract is awarded in accordance with the provisions of the Technology Products 2 Framework Agreement RM3733.

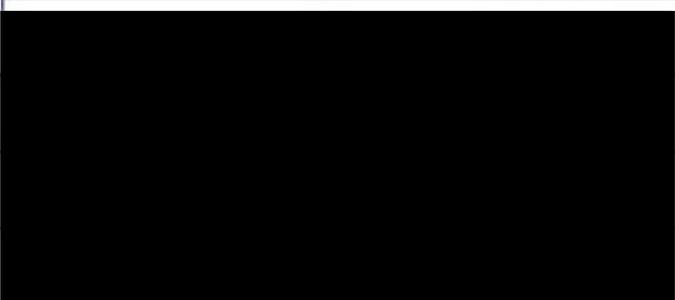
The Supplier shall supply the Goods and/or Services specified in this Order Form to the Customer on and subject to the terms of this Order Form and the Call Off Terms (together referred to as "the Call Off Contract") for the duration of the Call Off Contract Period.

#### SIGNATURES

##### For and on behalf of the Supplier

Name		
Job role/title		
Signature		
Date		

##### For and on behalf of the Customer

Name		
Job role/title		
Signature		
Date		

**CQC reference CQC ICTC 718**

**Healthwatch England Digital Systems:  
Hosting, Maintenance, Support and  
Development**

**Invitation to Tender**

**STATEMENT OF REQUIREMENTS**

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### 1.1 About Healthwatch England

Healthwatch England is the national consumer champion in health and care. We have significant statutory powers to ensure the voice of the consumer is strengthened and heard by those who commission, deliver and regulate health and social care services. We are the national body for the local Healthwatch network of 148 sites across England.

Where very important issues arise, advice is provided to the Secretary of State for Health, the Care Quality Commission, NHS England, NHS Improvement or local authorities in England. By law they have to respond publicly to advice from Healthwatch England.

In order that we can deliver our statutory functions, we will be continuing to roll out our digital products to the local Healthwatch network and developing our understanding of how to use local insight credibly and with influence. This is how we plan to make sure that we improve the experiences of people using health and social care services.

The Healthwatch England business plan outlines 3 key priorities for 2017/18:

1. **Priority One:** To provide leadership, support and advice to local Healthwatch to enable them to deliver their statutory activities and be a powerful advocate for services that work for people
2. **Priority Two:** Bringing the public's views to the heart of national decisions about the NHS and social care
3. **Priority Three:** To build and develop an effective learning and values based Healthwatch England

### 1.2 Digital Outcomes

- To identify policies and programmes where Healthwatch evidence and insight can add value
- To see more partners using our insight and evidence to drive improvements in health and care
- To see an increase in public involvement in major health and social care reforms
- Ensure that people's experiences help shape how health and care services work
- To facilitate the sharing of health and social care service information with Healthwatch England
- The use of a common system to capture systematic data within the network

### 1.3 Business Objectives

- Align Healthwatch and CQC's Digital strategy
- Host, develop and continue to roll out a CRM for local Healthwatch and Healthwatch England
- Review and deliver ongoing CRM requirements throughout 2017-2019
- To put a single system in place for all local Healthwatch to enable them to capture patient experience feedback systematically
- To deliver CRM training and support to the local Healthwatch network across 148 sites
- To make it easy for people to access national/local intelligence and reports

# healthwatch

- To make it easier for people to find their local Healthwatch
- To promote and maintain our brand presence online

## 1.4 Digital Products

- CiviCRM – Healthwatch England site, demo, testing and staging sites plus (to date) 87 local sites<sup>1</sup>
- Healthwatch England website
- Local Healthwatch website template
- Healthwatch Website demo site
- Hub (Currently Sharepoint Site) & Yammer Community
- Healthwatch England test website

## 1.5 Digital Users

The main users of the Healthwatch digital channels are the public, local Healthwatch staff including volunteers, and health and social care stakeholders. Healthwatch digital channels support the core business priorities in the following ways for the following users.

Priority	User	Role of digital	Current platform
1. Provide local Healthwatch with support	Local Healthwatch staff and volunteers	<ul style="list-style-type: none"> <li>• Help discover and access advice, guidance, tools and training</li> <li>• Network on-line with other local Healthwatch securely</li> <li>• Secure system to capture and share patient experience and general workflow</li> </ul>	SharePoint <sup>2</sup>  CiviCRM
	Local Healthwatch Wider Public Local Healthwatch stakeholders	<ul style="list-style-type: none"> <li>• Enable people to find local Healthwatch reports and news</li> <li>• Support a consistent brand experience</li> <li>• Enable people to get involved or share experiences</li> </ul>	Drupal and Wordpress <sup>3</sup>  CiviCRM
Ensure peoples experiences help shape how health and care	Wider public	<ul style="list-style-type: none"> <li>• Enable people to find national reports and news</li> <li>• Enable people to find their local Healthwatch</li> </ul>	Drupal <sup>4</sup>

<sup>1</sup> It is anticipated that more local sites will be installed in the near future so this number will increase. The ambition is that all 148 sites will adopt the same digital system to share information more effectively.

<sup>2</sup> We currently share resources with the network via our SharePoint site ([www.healthwatchhub.co.uk](http://www.healthwatchhub.co.uk)) and Yammer network ([www.yammer.com/healthwatchhub.co.uk](http://www.yammer.com/healthwatchhub.co.uk)) designed to help local Healthwatch foster and build relationships online.

<sup>33</sup> We provide but do not maintain a website template used by around half of the 152 local Healthwatch services

<sup>4</sup> We manage a Drupal website [www.healthwatch.co.uk](http://www.healthwatch.co.uk)

services work		• Support a consistent brand experience	
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Healthwatch England requires a suite of digital resources which include hosting, maintenance, day to day support as well as development and training support. This will enable Healthwatch to continue to discharge its statutory functions, primarily the sharing of information gathered from the local Healthwatch network about people's experiences of health and care services.

The requirement has been divided into five individual lots that can be bid for individually or as a whole and can be summarised as follows:

<b>Lot One</b>	<b>Hosting and maintenance of Drupal based corporate websites, CiviCRM website and 87 CiviCRM local sites (potential growth to 148)</b>
<b>Lot Two</b>	<b>Support for Drupal based corporate websites, CiviCRM website and 87 CiviCRM local sites (potential growth to 148)</b>
<b>Lot Three</b>	<b>Development of CiviCRM website and 87 CiviCRM local sites (potential growth to 148)</b>
<b>Lot Four</b>	<b>Training for CiviCRM Users</b>
<b>Lot Five</b>	<b>Development of Healthwatch corporate websites</b>

Each of the five lots are outlined in more detail below:

<b>Lot One</b>	<b>2.1 Hosting and maintenance of Healthwatch England's Drupal based corporate websites, the CiviCRM website and 87 local CiviCRM sites</b>
<ul style="list-style-type: none"> <li>Healthwatch England requires an infrastructure that can host up to 160 CRM sites; this includes staging and demo sites, the Healthwatch England CRM site and the CRM Support site as well as the option to host direct with the local Healthwatch sites.</li> <li>Hosting is also required for the Healthwatch corporate websites to include but not restricted to Healthwatch England website, the local Healthwatch website template, the Healthwatch Website demo site, the Hub (Currently Sharepoint Site) and the Healthwatch England test website.</li> <li>In terms of the required CiviCRM maintenance the supplier will need to outline how ( and where necessary in collaboration with developers) they will work to ensure that the following requirements can be delivered successfully: Maintenance and upgrades including:             <ul style="list-style-type: none"> <li>security releases</li> </ul> </li> </ul>	

- annual penetration testing
- patch testing
- porting
- back ups
- disaster recovery
- manual changes
- rolling out changes to the network,
- upgrades and maintenance of all sites
- automated selenium tests
- visual testing
- In terms of the maintenance requirement for the corporate website the supplier will need to outline how ( and where necessary in collaboration with developers) they will work to ensure that the following requirements can be delivered successfully:
  - annual penetration testing
  - patch testing
  - daily back-ups
  - deployment of security updates when necessary.
- Healthwatch England will require continued rollout of the CiviCRM to the network, ensuring that a site can be rolled out within 24 hours of confirmation.
- The current system is hosted by an independent provider. All bids should include information on how the supplier will work with the existing incumbents to maximise on any efficiencies that can be obtained from this arrangement.

**Lot Two**

**2.2 Support for the Healthwatch England Drupal based corporate websites, CiviCRM website and 87 CiviCRM local sites**

- Healthwatch England requires technical support for 87 CiviCRM (potential growth to 148) sites amounting to 4 days per month. The supplier must provide:
  - a ticketing system to enable the local Healthwatch network to raise issues
  - a system that enables the resolution to all raised issues within 48 hours
  - technical support and advice
  - basic support and system tracking
  - rolling out new sites within 24 hours
  - bulk email rollout to the network
  - monitoring of data push system
  - failure management and resolution
- Healthwatch England also requires CiviCRM consultancy up to 4 days per month which includes:
  - project management and forward planning
  - planning roll outs and technical developments
  - meeting attendance
- The CiviCRM requirement also includes management of the CiviCRM automated “data push” function. This enables Healthwatch England to pull data through from network users

automatically at a rate of 2 activities per second.

- The supplier must guarantee system security for users including a password dissemination process and ensuring all relevant security protocols are in place.

## Lot Three

### 2.3 Development of the CiviCRM website and 87 CiviCRM local sites (potential growth to 148 sites)

(Development will be planned and prioritised according to the Healthwatch England Strategy which is currently in production)

- Healthwatch England will provide a system that ensures data transfer compatibility if either the core system changes or local Healthwatch providers opt for another system other than the Healthwatch England CiviCRM
- Ongoing management and development of the CRM Support Site/Hub. This includes:
  - uploading content
  - management of the ticketing site
- Discovery, development and deployment of system improvement in support of the Healthwatch England business plan and newly implemented strategy.
- Ongoing improvement of the CiviCRM system including the implementation of ad hoc, small scale pieces of development suggested by users. This will include:
  - ongoing refinement and development of the Healthwatch England CiviCRM taxonomy
  - progressing work undertaken on the analytical functions within CiviCRM which includes the newly developed heatmap function
  - improving the user experience of the CiviCRM system
- Development testing on staging sites with well-planned deployment to minimise impact upon users
- Discovery and development work to assist in integrating Healthwatch digital communications channels – see Lot Five

## Lot Four

### 2.4 Training for CiviCRM users

Healthwatch England will support the local Healthwatch network by providing a range of user training that has maximum reach and increases usage of the CiviCRM. It must be based upon a process of ongoing feedback and review

- The Healthwatch England training requirement includes the development and delivery of a suite of resources as follows:
  - the delivery of 24 CiviCRM training sessions. This will include new user training as well as refresher training. The delivery method will be dependent upon the training needs requirement but will include a range of face to face sessions across England, hosting webinars on specific subjects and ad hoc training for other digital systems if required.
  - the development and production of user guidance to support Healthwatch England digital systems

- the development and production of accompanying training videos
- As a minimum CiviCRM user training sessions will need to include;
  - Introduction to the CiviCRM for new users
  - Reports
  - Contacts
  - Groups
  - Relationships
  - Activities
  - Data Protection
  - Searching & Exporting
  - Events
  - Case Management
  - Using the Enquiry Feedback Wizard
- The trainer will ensure that any intelligence received on system usage and functionality will be fed back into the Digital Team at Healthwatch England to inform system development
- The trainer will advise trained users on how to effectively cascade their learning to use it to maximise efficiencies.
- To provide a train the trainer function for Healthwatch staff.
- To attend the Healthwatch Annual Conference in support of CiviCRM users
- To attend CiviCRM development meetings when and if required.

**Lot Five**

**2.5 Development of the Healthwatch corporate websites**

This Lot is divided into two clear work streams

- a. Development of the Healthwatch England website and local Healthwatch website template
- b. Development of the Healthwatch Hub

**Workstream One: Developing the Healthwatch England website and the template for local Healthwatch:**

Healthwatch England provides a template website to local Healthwatch that they can adapt locally. This, as well as our corporate site needs updating and refreshing. This work will include:

- improved visual brand representation
- new and improved way of showcasing content
- responsive template
- Improved navigation to enable people to find or search for content and assets quickly and easily
- non-functional requirements such as usability and accessibility the site would need to be accessible for those using screen readers and comply with our accessibility guidelines: <http://www.healthwatch.co.uk/website-accessibility>
- Exploring functional development of local Healthwatch template such as integration with the local Healthwatch CRM
- Developing the ability to share local Healthwatch guidance documents on the Healthwatch

## England website

- Creating a password protected area for local Healthwatch staff on the Healthwatch England website
- Exploring integrating a chat function (replacing Yammer) for the Healthwatch England website
- Advice and instructions on how to package up website template for local Healthwatch so they can install and update their own websites.
- Release improved Healthwatch England corporate sites by end of March 2018

## **Workstream Two: Developing a new Hub (website for staff and volunteers working for Healthwatch) based on Drupal.**

- Creating a new closed website based on Drupal and shutting down the SharePoint Healthwatch Hub to enable better integration with our CRM and corporate website.
- Developing a site that is engaging, easy to use and makes content easy to find and is in line with our brand.
- Scope how this site could integrate with the CRM and understand potential for integration of CRM mailing and events system
- Develop improved visual brand representation
- Develop new and improved way of showcasing content

Although the main objective is to move the Hub, it may include scoping other functional developments to the site such as the deployment of an on-line networking area to replace yammer.

- Improve navigation to enable people to find or search for content and assets quickly and easily
- Scope the cost of creating a single sign on process between the Drupal site and the Communications Centre. Dependant on outcome:
- Develop single sign on to work successfully between website and separate communications centre website and either Yammer or a private discussion area on the website.

## **2.6 General Requirement: Transition In and Transition Out**

All prospective suppliers are required to outline their ability to provide the following where applicable as part of their entry and exit arrangements:

### 2.6.1 System Migration

- A process outlining migration to a new system including preparing handover notes of system customisations, modules and extensions.
- Working documents including specifications, wireframes and sign off sheets.
- Access to any project tools in place, i.e. Basecamp, or migrate all data over to a new project tool.
- Access to any code that has been used.
- Full access to all servers, detailed instructions of how the servers have been configured and migration of data in existing servers (if relevant).
- Full access to any tooling or monitoring used to deploy or test the infrastructure.
- Detailed information about the development build and how it would impact on any new

system migration.

- A project plan for the migration to a new system which includes data transfer, both for Healthwatch England and Local Healthwatch.
- A process to ensure minimal system downtime for migration to a new supplier, if any.

## 2.6.2 Data Transfer

Should Healthwatch adopt any new system within scope of the contract the supplier will need to facilitate any necessary data transfer ensuring minimum disruption to the ongoing work of local Healthwatch and Healthwatch England. All potential suppliers will need to describe how they will ensure the provision of:

- Full access to the databases and data to enable transfer from the current system into any new system, if required.
- An outline plan that ensures continuity of data with minimum disruption to the site and to the ongoing work of local Healthwatch and Healthwatch England, if required.
- The means to map data from the existing system to the new system providing database exports if necessary.
- A project plan which includes a timeline to undertake a complete exit from the current CiviCRM system to a CQC approved system, if required.
- A clear process by which they will work with the CQC technical team, as well as Healthwatch England to achieve any transition.

### 3.1 The CiviCRM Project

The Customer Relationship Management (CRM) project was initiated in 2012. Following evaluation, the CiviCRM system was chosen by Healthwatch England for the following reasons:

- It is flexible
- It is secure
- It is an open source, web based system
- And has been developed for non-profit and third sector organisations.

The aim of the project was and continues to be the provision of a CRM system that supports the common requirements of 148 local Healthwatch, whilst providing sufficient local customisation to accommodate each organisation's distinctiveness in approach and process.

Initially there was a pilot group of 33 local Healthwatch sites. Due to the way the project was originally set up, Healthwatch had been effectively running two separate projects; the pilot project and the rollout project.

The pilot project is distinct in that they were able to make field changes on the system that led to significant variation between sites. Subsequently the fields were locked down for the rollout project. The variation in fields caused issues including upgrades crashing, and difficulty in installing developments to the affected sites. This has been rectified in all but a few cases and Healthwatch have now rolled out the Enquiry Feedback wizard to improve the user experience and simplify inputting (where local Healthwatch capture their consumer feedback data via a webform that is then forwarded to Healthwatch England).

In September 2015 Healthwatch completed the pilot phase and rolled out the system to a further 44 local Healthwatch (as per an agreement with the Department of Health), this constituted the "rollout phase". Healthwatch then spent 18 months standardising the pilot sites and the rollout sites, changing altered fields back to the agreed common base, undertaking further site development and mapping across the field changes. Most users have now moved onto the standardised system with only one or two users still using their initial fields and not taking up the Enquiry Feedback Wizard. We currently have 87 instances rolled out, equating to around 600 users.

<b>Purpose</b>	To provide local Healthwatch and Healthwatch England with a CRM system to enable them to capture and share patient experience feedback in a systematic way.
<b>Primary Users</b>	Local Healthwatch and Healthwatch England

## Benefits of the CiviCRM

- It is a secure portal to capture data in a systematic way.
- User access is restricted and the system is tested annually for security and cyber-attacks to ensure robustness.
- Provides local Healthwatch with a secure operations tool for managing day-to-day workflow and capturing consumer experience, which they do as part of their role to ensure any risks to consumers of health and social care services are highlighted.
- Pushes intelligence from each local site through to Healthwatch England via the 'data push' system (see detail below) which informs on trends and themes in health and social care at a local level as well as engagement work being undertaken locally.
- Users can manage and report on contacts, enquiries, signposting and case information securely, manage meetings, face to face engagement and consumer experiences.
- The system also enables them to produce surveys and newsletters, manage and measure the impact of activities and events as well as report on meeting attendance.

## Where we are now – business utilisation

- Capturing the various relationships the local Healthwatch network may have with a member of the public or health/social care organisation. As an example, the interaction a consumer has had with a GP and with a hospital service
- Linking the relationships between consumers as individuals, groups and organisations. As an example, the ability to link organisations or groups together
- Creating and storing contact data; these contacts are both organisations and individuals. The data can include items such as addresses, websites, telephone numbers
- Any activities that have taken place: from each activity follow up activities can be scheduled and files attached as necessary
- Sending communications, either bulk emails or single communications to specific contacts; scheduled reminders can also be set so that an email is automatically sent to an assigned user to following an activity
- Case management; allowing users to create, manage and track workflows
- Reporting; allowing users to run and save reports, export, download and add to case management, create templates and automate. Reports most commonly used by local Healthwatch are those within Enquiry feedback, as well as the Enter and View reports and Annual Reports Other reports required could be research on Health and Care services, statements on quality accounts, intelligence and engagement reporting for CCG's. Report templates would need to be built for the most common reports used across the network.
- The Enquiry/Feedback Wizard is used to record consumer feedback that the local

Healthwatch receives. This automatically creates a case. This is also the data that is pulled through to Healthwatch England via the Data Push function. The supplier will need to install the Enquiry Feedback wizard on those sites not currently using the wizard

- The ability to carry out outbound communications and campaigns to a targeted audience for marketing and stakeholder management purposes, this would include sending newsletters and calls for action.
- Event management; to create events, record and manage the event host and attendees
- The ability to conduct effective and meaningful market analysis based on the information captured.
- Data Push function – an automated function to pull through activities from the local Healthwatch Enquiry Feedback area of the local sites through to the Healthwatch England site at a rate of two activities per second. Data from all local Healthwatch to be pulled through on a monthly basis.
- The ability to analyse data using the Pivot Table activity reporting function, which enables the user to aggregate and summarise data, via graphical representations
- Local Healthwatch tab – To create a separate tab to enable local Healthwatch to create fields and options that do not overlap with the Enquiry Feedback area of the system, that will allow users to capture local information required that does not need to be standardised with other network users or pulled through to the England site via the Data Push.

## Where we want to get to

- Further development of the Heatmap function and possible trial via Healthwatch England site only initially
- Alignment of Enquiry Feedback fields across all sites, to ensure all instances have the same taxonomy within their Enquiry Feedback areas so Healthwatch England can pull through the correct data
- Annual Penetration testing, to ensure robustness of the system
- Mapping fields from LHM and other external systems to ensure that data stored within other systems can be pulled into the CRM via the Data Push
- Pulling through data from non-CRM sites. Exporting the data, manually running manipulations and importing to Healthwatch England site.
- Undertaking various national workshops on issues including the integration of data capture, linking county users together to form “devolved ways of working with the CRM”, attending training workshops, Healthwatch conferences and CRM Stakeholder Groups when necessary
- Delivering up to 24 new user training sessions per annum including bespoke sessions and improved induction training to increase usage and encourage future system development. Improving and developing webinar based training to increase the number

of Healthwatch reached, provide more flexible, shorter sessions in the work place.

- Activities tab – adding a new tab to a contact record to show all related contacts for that organisation, which will show a view of all linked contacts to the activity
- Related contact data on pivot tables – adding related contacts (as above) to pivot tables
- Data governance. Ensuring that data entered into the CRM and pulled through via the data push is accurate, high quality data.
- Data security and data protection training.
- Implementing ad hoc pieces of development work following feedback from CRM Trainer and/or CRM Stakeholder Group
- CRM integration to website
- Enhancements to web products
- Development of Heatmap following rollout to Healthwatch England

### 3.2 Corporate Websites Project: (1) Healthwatch Websites and (2) the Healthwatch Hub

Workstream One: The Healthwatch England website and local Healthwatch websites were developed in a 'brochure' style to share the early work of each organisation. As Healthwatch continues to develop and its strategic focus evolves, its websites must change as well.

Healthwatch England needs the websites to:

- Promote and maintain the Healthwatch brand presence online.
- Make it easy for the public and stakeholders to access national/local intelligence and reports.
- Make it easy for people to find their local Healthwatch, share their experiences and be signposted to services

The key deliverables of the project include:

1. Improved navigation to help people find what they are looking for as well as improved brand representation
2. Improving usability, making the sites easier to use and access ensuring that the design makes the content engaging and useful
3. Increasing responsiveness, enabling access using different devices and providing a template that can be incorporated as part of the CRM offer

Workstream Two: Healthwatch England currently have:

- A SharePoint site ([www.healthwatchhub.co.uk](http://www.healthwatchhub.co.uk))
- A Yammer network ([www.yammer.com/healthwatchhub.co.uk](http://www.yammer.com/healthwatchhub.co.uk)) that is used to communicate with the Healthwatch network.

While the Yammer network continues to be a useful way for Healthwatch staff and volunteers to communicate and share resources, engagement with the Hub is low, with significant areas for improvement. In particular, usability, design and content.

#### Purpose

1. Develop a website template for local Healthwatch and evolve the Healthwatch England website so that they that they respond to changes in technology and meet user requirements.

	<ol style="list-style-type: none"> <li>2. Develop a new section of the Healthwatch England website to enable local Healthwatch to access news, guidance, tools and training.</li> <li>3. To explore potential integrations with the Healthwatch CRM and the provision of a closed community where local Healthwatch can network.</li> </ol>
<b>Primary Users</b>	The public and stakeholders

**Where we are now**

Workstream One: Healthwatch websites

- The Healthwatch website is not responsive– meaning it does not resize for tablets and other devices. Instead Healthwatch have two sites, one that is mobile enabled, that has had on-going problems and one designed for desktop viewing.
- The current template and that used by local Healthwatch is based on Drupal 7. Drupal 8 has now been released and the site will need changes in order to incorporate this new version.
- The current navigation on both local Healthwatch websites and Healthwatch England’s does not also allow users to find information quickly or easily. For example: Healthwatch responses and news are separate sections. Healthwatch reports cannot distinguish between research and guidance.
- The navigation on many local Healthwatch sites is of variable quality resulting in a poor user experience.
- People need to be engaged visually as well as through the written word. The current site and template for local Healthwatch does not enable the use of pictures or video to their full effect.
- Enabling people to share content is critical - but at the moment this is not easy to do from the Healthwatch site or from local Healthwatch sites, limiting the potential audience and engagement.

Workstream Two: Healthwatch Hub

- SharePoint isn’t very intuitive to use, both in terms of using and managing the site.
- The Hub doesn’t display well on mobile devices. Research from the public site states that mobile users are increasing – therefore it would make sense to ensure that the Healthwatch site is responsive.
- The current navigation does not support users to find what they’re looking for quickly and easily. Content is stored in a way that is not intuitive to user needs.
- Healthwatch needs to engage people visually as well as through the written word. The current site doesn’t best promote the Healthwatch brand in a visually engaging, way. It also doesn’t make the most of multimedia content.
- A lot of the content on the Hub is now out-of-date or no longer relevant. Having old content on the site can be confusing for users and also means that they have to look harder for the content they are looking for.

**Where we want to be in the future**

- Healthwatch England needs to better understand user needs and provide a corporate website and an online space that improves the user experience in terms of:
  - Supporting engaging and useful content
  - Usability
  - Design and feel
  - Making information easy to find
  - Ensuring information is accessible to all users, across multiple devices.
- Healthwatch England provides an online space that clearly brings together the support and resources that are provided to the local Healthwatch network including:
  - CRM
  - Yammer or an alternative on-line networking space
  - Communications Centre
  - Guidance and support documents
  - Training
  - News
- Once website user needs are understood Healthwatch England can provide a local Healthwatch template that, as well as delivering a similar improvement in user experience as the corporate site, is also easy for local Healthwatch to maintain and integrates with the Healthwatch CRM.
- Healthwatch England are able to support local Healthwatch to deploy their local website templates by either signposting them to potential suppliers or supporting them with template documentation.
- Further understanding about how secure the Healthwatch England website is as well as the local Healthwatch template is acquired.
- The local Healthwatch support needs regarding website maintenance, development and hosting are ascertained as well as who is best placed to provide the support to them.
- Healthwatch will ensure that its websites are accessible to all to ensure that everyone has a good user experience.
- Any redundant content on the Healthwatch England website is removed or changed. Less clutter resulting in a better user experience.
- Healthwatch understands the best structure to use to enable people to access content easily.

## 4 Service Levels and Non Functional Requirements

### 4.1 Availability Requirements and Support

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4.1.2 Any system is required to meet service availability levels of 99.5% Monday to Friday 5 days a week with the exception of bank holidays. System maintenance should be carried out outside those working hours.

4.1.3 The following server environments are required Live, Test, Development, User Acceptance Testing, Pre-production and Training, if appropriate to the nature of the service.

4.1.4 System will be supported in the event of a disaster and any recovery plans will be tailored to Healthwatch England needs and be compliant with business continuity standards.

## 4.2 Recovery Time

4.2.1 The recovery mechanisms must support minimal recovery time with optimal recovery points.

4.2.1 Back-ups are to be carried out completely according to documented data back-up requirements. Appropriate personnel are to verify the usability of backed-up data and retain verification evidence.

## 4.3 Performance and Scalability

4.3.1. The system must handle an increase in storage requirements without major system changes or data migration activities.

4.3.2 System shall be scalable both in terms of users and storage, with that easy to change both in terms of cost and minimal disruption.

4.3.3 The system must minimise the load on Healthwatch England's network and provide mechanisms for reporting on and controlling that load.

4.3.4 The system should be performance tested so that performance at the time of commissioning can be accurately known

4.3.5 Response times for the website should be in line with NHS Digital standards (for example current home page size 1.8MB to load <1.7s). A typical task in the CRM should be performed at more than 2 activities per second.

## 4.4 Integration

4.4.1 System should seek to support authentication using Healthwatch England's existing staff directory service and seek to implement a suitable single sign on (SSO).

4.4.2 Where relevant to its function, CiviCRM and Drupal will be capable of interfacing with Healthwatch England internal and external data sources, such as Microsoft Access and Excel, Sharepoint and Yammer, MySql, and potentially SQLServer 2008 and above. A service oriented approach should be used, where practical and possible.

4.4.3 System shall support the use of a range of mobile devices, meeting CESG requirements.

## 4.5 Monitoring

4.5.1 The application must be monitored by the provider, with suitable alerting tools in place to notify of current or imminent service breaches and security issues.

## 4.6 Reporting

4.6.1 The Contractor will submit service availability report on a monthly basis.

4.6.2 The Contractor will submit a monthly reporting on current versus projected capacity, both in terms of storage and licenses.

4.6.3 The Contractor will provide a monthly report on the overall performance on the service, including performance, requests and incidents relating to the service.

## 4.7 Change Management and Release Process

4.7.1 The Contractor will demonstrate their ability to perform changes to the application in a controlled and structured manner, including adherence to any methodologies.

4.7.2 System to be subject to formal processes for release management, in association with customer with regard to testing.

4.7.3 Responsibilities related to program coding, application testing and approval, program transfer between environments are segregated.

## 4.8 Usability

4.8.1 The application must support UK English.

4.8.2 All system configuration settings are remotely accessible to the system administrator through application screens or setup programs (i.e. no hard coded system variables exist and include system, user, roles, company and other configuration screens).

4.8.2 The solution must provide an intuitive user interface that enables the user to complete a task whilst minimising the need to navigate the system

4.8.3 Customer Desktop devices are restricted in terms of the ability to download components from external sources. The system shall operate with the minimal need for software components to be applied to PC or desktop devices. The standard desktop is Windows 7 32 bit with 3.5 Gb of RAM with Internet Explorer 11 and Microsoft Office 2010. In the future windows 10 and/or a 64 bit client may be used and any client software should be able to take advantage of that and increased memory availability.

The supplier must provide comprehensive systems administration, installation guides and processes, as appropriate to the nature of the service.

A complete, typical deployment architecture must be described.

## 4.9 Compliance

4.9.1 The application must comply with the CQC Architecture Principles.

4.9.2 Compliance to all U.K. legal requirements including the Data Protection Act (1998), the Freedom of Information Act (2001) & Privacy laws.

4.9.3 The system or service must comply with the U.K. Government Digital strategy.

4.9.4 There should be a mechanism for purging and archiving data in accordance with an agreed data retention policy.

## 4.10 Escrow

4.10.1 In the event of buyout or liquidation of the vendor the base source code of the software must be made available to Healthwatch England.

## 4.11 Support

4.11.1 Supplier shall provide a service desk with the ability to log and resolve incidents and requests. The supplier shall provide a named contact for escalation of issues and regular interface between the supplier and the customer. The supplier shall detail the channels available and typical response times for both fault resolution and functional query support. Support levels are further detailed in sections 4.13 and 4.14.

## 4.12 Accessibility

4.12.1 The system shall enable accessibility via assistive technology for those who cannot use a standard mouse and/or keyboard e.g. WA3, Dragon Naturally Speaking and Windows 7 Voice Recognition software. It shall also enable access for those with additional visual or hearing needs. The supplier shall state how these needs are met by the software.

## 4.13 Service Hours

4.13.1 Service Hours are the times when users can expect to access and use the full functionality of the CRM and/or Web publishing systems. Service Hours are 24 x 365 and is comprised of Core Hours and All Other Hours:

4.13.1.1 Core Hours: 08:00 to 20:00 Monday to Friday excluding Bank Holidays

4.13.1.2 All Other Hours: all times other than Core Hours

4.13.2 Support Hours are the times during which the Contractor will provide resource to respond to and resolve incidents and requests associated with the CRM and/or website. Support Hours are 08:00 to 20:00 Monday to Friday excluding Bank Holidays.

4.13.3 CRM and website availability will be measured against Service Hours and presented as separate percent values

Period	Hours	Target Availability	Maximum Outage
<b>Production environments</b>			
Core hours	08:00 to 20:00 Mon to Fri	99.5%	4 hours
All other hours		99.0%	4 hours
<b>Non-production Environments</b>			
Core hours	08:00 to 20:00 Mon to Fri	97%	24 hours
All other hours		95%	24 hours

4.13.3.1 The minimum availability will be measured across a 13 week rolling period.

4.13.4 The maximum allowable outage is the maximum the CRM and/or website can be unavailable to the users. The Contractor will inform the Authority within eight (8) Working Days of its intention to carry out the planned maintenance that will require more than two (2) hours of downtime during the "all other hours period". Where the Authority's is withheld (which shall not be unreasonable) both parties will enter into negotiations in good faith to resolve the issue.

4.13.5 The Core Hours availability target for the production environment will be subject to Service Credits.

#### 4.14 Incident Resolution

Will be according to the severity within the times stated in the following table:

Category	Description	Response Time	Resolution Time	Hours of Cover
<b>Severity 1</b>	Entire system unavailable to all users	15 minutes	4 Hours	08:00-20:00 Mon-Fri exc Public Holidays
<b>Severity 2</b>	Specific modules of system unavailable to all users	30 minutes	8 Hours	08:00-20:00 Mon-Fri exc Public Holidays
<b>Severity 3</b>	Severe functionality defect	1 hour	12 Hours	08:00-20:00 Mon-Fri exc Public Holidays
<b>Severity 4</b>	Minor functionality defect	1 hour	Scheduled outage to resolve	08:00-20:00 Mon-Fri exc Public Holidays

4.14.1 Resolution time is time between detection of the incident, by monitoring and alerting systems or a report to the Contractor helpdesk, and restoration of the functionality to normal operating performance levels.

4.14.2 The Contractor Help Desk will be available to received incidents and requests 24 x 365

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4.14.3 In the event of Severity 1 incidents, the Contractor shall inform the appropriate Authority contact as identified in the following table in line with the times indicated.

4.14.4 Core Hours; contact by telephone and email

4.14.5 All Other Hours; contact by text and email supplemented with telephone at beginning of next Core Hour day.

<b>Service downtime that will impact availability during core hours</b>	<b>Authority</b>	<b>Contractor</b>
<b>Less than one hour</b>		
<b>More than one hour</b>		
<b>More than four hours</b>		
<b>More than eight hours</b>		

## 5 Functional Requirements

### 5.1 Users and Instances

The Contractor should assume the following maximum number of Users and instances:

5.1.2 CRM is currently 87 sites with approximately 600 users. The solution (see section 5.3 for core requirements) will be scalable to meet potential demand for 160 sites.

5.1.3 The website solution (see section 5.4 for core requirements) will meet the needs of the main Healthwatch England website as well as provision for up to 160 Local Healthwatch sites.

Based on the following assumptions:

### 5.2 Assumptions

The contractor will ensure that:

5.2.1 The system may be enhanced through a series of releases to meet additional requirements over time and some of those may supersede those listed; such requirements, as agreed by the Contractor, shall be added via the change control process as stated in the contract schedules.

5.2.2 The system is currently delivered through a mix of standard CiviCRM and Drupal functionality and configuration of CiviCRM and Drupal, and the contractor is not responsible for issues that arise from the capabilities of the standard product of either.

5.2.3 The Contractor is only responsible for delivering the Services listed in sections 5.3 and 5.4. The parties agree that the system meets the core requirement and process requirements at the commencement of this contract. The listed core requirements in sections 5.3 and 5.4 will be met and continue to be met by the release requirements as requested by the Authority and as agreed by the Contractor providing that this is within the parameters of the CiviCRM and Drupal products.

Following a new release that, by agreement with the Authority, changes functionality so that a Core Requirement cannot be met, the Contractor shall not be liable for a failure to meet the Core Requirement. Following a change to the CiviCRM or Drupal standard product that means a Core Requirement can no longer be met, the Contractor shall not be liable for a failure to meet that Core Requirement.

### 5.3 Core Requirements - CRM

5.3.1 The system will have the ability to record all of the external organisations and contacts with which the Authority deals.

5.3.2 The system will have the capability of recording relationships between organisations and contacts.

5.3.3. The system will enable the maintenance of a complete history of all tasks and interactions by organisation and contact.

5.3.4 A dashboard view will be provided to give a summarised view of information held about an organisation to the Users of the System, with more information on any kind of the items available via drill down.

5.3.5 The system will support the creation of activities which support specific business processes. The types of activity carried out by the system, along with the associated tasks, are to be defined by the Authority. The overall process for this is as follows:

5.3.5.1 Activity is created and the detailed tasks to be performed are created for the activity.

5.3.5.2 Resources are assigned to the individual tasks

5.3.5.3 Tasks are completed and marked as complete

5.3.5.4 Exception reporting occurs for uncompleted tasks

5.3.5.5 More complex activities may have further child activities, creating a hierarchy.

5.3.6 Task plans (a predefined set of tasks) will be used to ensure that a consistent, standardised approach is used for all activities of a certain type. However, it should also be possible to modify the default list of tasks for a particular activity. The task plans will allow the skills required to perform a particular task to be defined. Definition of the content of the task plans and associated tasks is an Authority responsibility. The System will provide an administration capability for such tasks and task plans. Users will then be able to modify the detail of individual tasks.

5.3.7 Enquiry/Feedback activity is used to log external feedback into the organisation that needs to be managed through a lifecycle of reporting, feedback and resolution.

5.3.8 The system will support generic query handling

5.3.9 The Authority deals with correspondence received via a number of different channels and users will be able to record all such interaction with contacts.

5.3.10 The users will have a mechanism to be able to send correspondence to contacts and to record the fact that such correspondence has been sent. This may be across a variety of channels and may be target at individuals, or at large groups of people.

5.3.11 The system will handle the following inbound channels:

- Telephone
- Email
- Printed mail
- In person

- Via Social Media
- Web Form
- Other – ability to add

5.3.12 It will be possible to create e-mails and letters using standard templates from inside the system, in which case the interaction should be automatically created and attached to the relevant contact. Definition and administration of templates will be a responsibility of the Authority.

5.3.13 It will be possible to attach documents (e.g Microsoft Word, scanned image, PDFs) to contacts, cases and activities.

5.3.14 It will be possible for users of speech recognition software to use agreed parts of the system and to achieve the same functional results as users of the normal high interactivity interface.

5.3.15 It will be possible to record changes to named fields in the audit log. Definition of the writes and reads to be recorded in the audit log will be the responsibility of the Authority.

5.3.16 It will be possible to enforce password strength rules in accordance with the guidelines previously provided by the Authority. Any new rules or guidelines will be added via Change control.

5.3.17 It will be possible to review and where necessary delete attachments against a retention schedule whilst keeping an audit of the attachment deleted. Definition of the retention schedule will be the responsibility of the Authority.

5.3.18 The system will enable the production of a number of static and ad-hoc reports. The reports may be delivered using a combination of predefined queries, manually entered queries, or CiviCRM inbuilt reporting functionality.

5.3.19 The system will be capable of producing output, in a format to be agreed, to allow for interface with the Authority's intelligence systems, and of accepting information, in a format to be agreed, from the Authority's intelligence systems.

5.3.20 The system will be capable of interfacing with web based forms, via the Authority's website and associated web applications.

5.3.21 The system will be capable of loading new contact, case or organisation datasets, in a format to be agreed.

5.3.22 The system will be capable of maintaining an audit trail to allow the identification of user name, date and time of all amendments and deletions of data entries. The audit trail can be retained for a period of up to six (6) years. The administration of this is the responsibility of the Authority.

5.3.23 The system will permit and organisation to be linked to any other organisation, and any contact to any organisation. It will be the responsibility of the Authority to ensure that the relationships defined make business sense.

5.3.23.1 For each relationship, a relationship type and/or comment will be captured.

5.3.23.2 The relationships between organisations will be easily navigable

5.3.24 A dashboard view is required to provide a single summarised view of information held about an organisation. This may involve the development of a number of separate dashboard views, each pertinent to a different user role or instance of the system (for example, local version of CRM). The system will support the merging of organisations and allow users to see history of each old organisation.

5.3.25 Activities will be manually created in the System. These can be scheduled to take place at any time in the future, with a specific start date, due date and end date. Assigning a task plan to an activity will generate a default set of tasks for the activity. Individual tasks can also have start and due dates.

5.3.26 The system will make it clear to an employee (User) that they have been assigned to a task or an activity.

5.3.27 The system will support a process to define and maintain employees.

5.3.28 The system will support creating a new contact if the contact does not already exist within the system and linking that new contact to an organisation, if applicable.

5.3.29 The system will allow the acceptance of inbound communication from multiple channels. Inbound communications will require a Service Request (SR) to be created. The system will allow the processing of SRs through a defined lifecycle from creation to resolution. An SR will pass through various statuses during its lifetime. The system will not enforce which transition states are allowed. Typical sequence might be:

- Open
- On hold
- Pending
- Overdue
- Closed
- Resolved

5.3.30 The system will enable associating tasks to the SR to record the detail of internal actions performed and correspondence sent/received.

5.3.31 The system will allow the passing of SRs between employees/teams for resolution. For SRs assigned that have been assigned to a particular team or individual, the assignees will be able to access and manage this queue of work.

## 5.4 Core Requirements - Website

The website needs to supply a common set of tools that offer enough autonomy for both Healthwatch England and for each Local Healthwatch to use to support their own specific stakeholder needs and preferences.

5.4.1 The site will provide the ability to publish all content required in support of Healthwatch England and Local Healthwatch.

5.4.2 The site will be structured to ensure Search Engine Optimisation (SEO)

5.4.3 The site must incorporate flexibility in navigation to accommodate for potential overhaul of organisational structures, taxonomies, and roles and relationships

5.4.4 The site administrators/editors must be able to easily organise the navigational structure of the site, adding, deleting and amending sections and pages via the content management system (CMS)

5.4.5 Site administrators must be able to perform spell check and grammar check.

5.4.6 The site will contain a glossary of terms and acronyms and for these glossary terms to be linked to via site content

5.4.7 The site will have the ability to metadata tag.

5.4.8 The site will provide a directory service, singling out the relevant contact person for each stakeholder on a particular piece of content.

5.4.9 The site will allow for the site administrator to easily create, edit and delete user groups, including batch upload of new accounts.

5.4.10 The site will have the ability for site administrator to create, edit and delete users and groups, including batch upload of new accounts

5.4.11 The site should function as a central method of distributing news and messages to stakeholders and other groups. Users should have role-based access so that news, policies, etc. can be targeted at them. Content should also be made available via groups.

5.4.12 The site will allow for the ability to publish text via a WYSIWIG editor. Content editors should not need recourse to knowledge of HTML. The site will also allow for the embedding of multimedia (typically photos, videos, slideshows and audio files) as well as linking to internal and external resources.

5.4.13 The site will allow for the uploading and publishing of standard format documents (typically Microsoft Word, Excel, Scanned Images and PDFs). The site will allow for the meta-tagging for these attachments to support both site internal search and SEO.

5.4.14 The site will allow for the publication of syndicated news feeds, RSS or similar.

5.4.15 The site will have the ability to configure content publishing workflows by organising users into groups and roles, and subsequently assigning them rights (view, edit, publish, and approve) to sections of the website. These workflows and permissions should be assignable on a content type or content section basis.

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5.4.15.1 The site will allow for the configuration of email notifications and alerts to support the workflow process, allowing for alternative publish and approval authorities (to cover for absences).

5.4.15.2 The site will have the ability to enter comments while requesting, approving or rejecting changes.

5.4.16 The site will have the ability to set embargo and expiry dates for content.

5.4.17 The site will allow for site administrators to undo actions and edits across the site.

5.4.18 The site's search function must be site-wide and readily filterable. The search will allow for search on keywords and include the use of wildcards. Search results will be ranked in terms of best fit.

5.4.19 The site will allow for the tracking of traffic statistics via Google Analytics or similar

5.4.20 The site must comply with NHS Digital security standards and any prevailing CQC and Healthwatch England guidance.

5.4.21 The site will comply with W3C accessibility standards.

5.4.22 The site should work on standard supported web browsers across both desktop and mobile devices.

5.4.23 The site will adhere to Healthwatch England Brand guidelines.



## 7 Contractual Arrangements

### 7.1 Contract Length and Financial Obligations

The Contractor/s charges will be based on a 14 month contract from 1<sup>st</sup> February 2018 to the 31<sup>st</sup> March 2019 with the option of a further six month extension. The charges will be broken down for Lots One, Two, Three and Five as follows:

- Hosting and maintenance (365 days a year)
- Support (up to 48 days for support and development of CRM and 1 day for Web support)
- Development (will be based on specific requirements but will not exceed those detailed within the cost envelope)
- Transition

- 
- 

Support above entitles the Authority to five days of CiviCRM and Web support for each month of the yearlong contract. Hours will be split out and invoiced by month. Any unused hours will be carried over into the following month or allocated to Development.

Development above will be based on the following resource types:

- Principal consultant
- Senior consultant/ Project management
- Test/QA
- Designer
- Junior developer

#### 7.1.1 Time and Material Rates

These rates will apply to any consulting time purchased from the Contractor by the Authority during the duration of the contract (1<sup>st</sup> February 2018 to 31<sup>st</sup> March 2019) with the option to extend for a further 6 months.

These rates will only apply to pure time and materials work with monthly invoicing based on time worked and payment within 30 days of a correctly prepared invoice.

These prices are exclusive of expenses.

The rate card shall apply for 7.5 hour working days between the hours of 09:00 and 17:30.

All prices are exclusive of VAT.

#### 7.1.2 Payment Schedule

The contractor is required to invoice on a monthly basis upon contract signature.

The Purchase Order provided by the Authority must include the following information:

- A valid and unique Purchase Order reference which will be recognised by the Authority's Accounts Payable Department.
- Delivery contact and address
- Invoice contact and contact number
- Description of products and services to be provided and associated costs (exc. VAT)

## 7.1.3 Pricing Assumptions

1. The Authority shall pay within 30 days of receipt of a correctly prepared invoices
2. If significant change orders are raised, parties will renegotiate the Payment Schedule
3. Prices are exclusive of VAT
4. Invoice dates of options will be agreed when taken up

## 7.2 Service Credits

A service credit regime will be applied to ensure that the Contractor meets the contracted service levels. If not, the Authority will have rights to financial remedies (by way of service credits). The intent is to ensure that the Authority has the means to resolve sub-standard performance by the Contractor.

The service levels detailed in Section 4 and the Key Performance Indicators in Section 8 provide the measurement for service overall.

In terms of hosting, the availability of the production infrastructure during Core Hours is subject to service credits if it falls below 99.5% (excluding planned and agreed outages) measured over a quarterly period. The first measurement quarter for service credit purposes will commence once the refreshed infrastructure has been accepted into production by the Authority.

The Contractor will apply a credit on an increasing scale for availability below 99.5%, (excluding planned and agreed outages) to be capped at 10% of the quarterly charge for the Contractor element of the managed services in the event that the availability over the quarter was 90% or below as follows:

Availability of infrastructure in core hours	% of quarterly charge to credit
>99.5%	0%
99.5%	0%
98.5%	0.5%
97.5%	1%
96.5%	1.5%
95.5%	2%
94.5%	2.5%
93.5%	3%
93%	3.5%
92.5%	4%
92%	5%
91.5%	6%
91%	7%
90.5%	8%
90%	10%

In terms of support, if, measured over a 3 month period, the Contractor fails to meet its SLA, the Contractor shall issue the Authority with a credit note for the lesser of £2000 or 5% of the then current annual charge for CiviCRM and Web support.

In the situation where there are less than 11 incidents (total as opposed to breaching) in a 3 month period, the measurement period shall be extended until 11 incidents have occurred.

### **7.3 Authorities Responsibilities**

The Authority will assume project management responsibility for all works undertaken as part of this contract and will plan and attend regular contract management and service delivery meetings.

The Authority will ensure that throughout the duration of the contract all contracted parties will be subject to agreements that will ensure the necessary levels of support are met.

Where necessary the Authority will also ensure that processes and systems are put into place that promote efficiency and ensure effective delivery of requirements and parity between contracted parties.

The Authority retains responsibility for the roll out of software to its end users. Any delay in rollout will not affect pricing.

The Contractor shall recommend applications, databases, operating system patches or upgrades which the Authority will either approve or reject. If rejected, the Contractor will detail the impact on its ability to deliver the services.

The Authority will own and manage all specifications and approve or reject development subsequent to testing.

### **7.4 Contractors Responsibilities**

The Contractor/s will be responsible for delivering the functional and non-functional requirements as set out in Section 4 and 5 of this document and achieving the required service levels as set out in Section 4.

The Contractor/s will appoint a clear point of contact for project management to ensure smooth delivery of the work programmes; this will include regular attendance at meetings via phone or in person and a commitment to reporting progress and maintaining a clear activity log via a chosen communication channel.

The Contractor will provide monthly statement of accounts.

In addition the Contractor/s will be required to operate the service in accordance with the applicable legislation including:

- Computer Misuse Act 1990
- Data Protection Act 1998
- Copyright Designs and Patents Act 1988
- Health and Safety Act 1998
- Freedom of Information Act 2000

- Race Relations Act 1976 (Amendments 2000/2003)
- Disability Discrimination Act 1995
- Sex Discrimination Act 1975
- Equal Pay Act 1970
- Employment Equality Regulation 2003
- Age Discrimination Act 2006
- Employment Equality Regulations 2006
- General Data Protection Regulation (2018)

## 8 Key Performance Indicators

Indicator	Measured by	Reference Point or Target	Review Date
Hosting and maintenance - Consistent delivery of expected levels of service level availability as outlined in the requirements	Reported availability levels on a 13 week basis	99.5%	30 April 2018
Support - Response and resolution to support tickets within agreed timeframes	Report provided to Authority on a monthly basis	100% of support tickets resolved within 48 hours	30 September 2018
CRM Development - Increased take up and activity within the CRM system.	Report provided to Authority on a monthly basis	Growth target of 40% increase in activity (baselined against December 2017 data)	31 January 2019
Training - Measure of training satisfaction (and plotted against increase in CRM activity)	Monthly review of training evaluation feedback	Increase in satisfaction levels of training recipients (baselined against December 2017 data)	31 July 2019
Web Development – website equally responsive on both desk top and mobile devices	Measured by Pingdom or analogous web measurement software. User survey also conducted	Target of home page load time of less than 1.5s on both desktop and mobile. User survey to show satisfaction rate of over 60%	30 April 2018

### 8.1 Milestones

The majority of the requirements set out in this document relate to the ongoing support, hosting and maintenance of existing systems. Performance for Lot 1, Lot 2, Lot 3 and Lot 4 in particular will be measured against the defined service levels and key performance indicators set out above.

Work linked directly to new or ongoing website development projects will be subject to the establishment of agreed milestones upon award of the contract.

## 9 Exit Management

The contractor is required to ensure the orderly transition of the service from the Contractor to the Authority and/or Replacement Contractor in the event of termination or expiry of contract. This section sets out the principles of the exit and service transfer arrangements that are intended to achieve an orderly transition which shall form the basis of the Exit Plan.

### 9.1 Contract Obligations

During the term of the contract the Contractor/s will maintain a document that will detail the technical infrastructure. This document should be detailed enough to permit the Authority and/or replacement contractor/s to understand how the Contractor/s provide the service. This will enable the smooth transition with minimal disruption.

Each party will appoint an Exit Manager and provide written notification of such appointment to the other party within 3 months of the effective date. The Contractor's Exit Manager will be responsible for ensuring that the Contractor and its employees, agents and sub-contractors comply with the schedule. The parties' Exit Managers will liaise with one another in relation to all issues relevant to the termination of the contract and all matters connected with this schedule and each party's compliance with it.

### 9.2 Exit Plan

The Contractor/s will, within three months after the award of the contract, deliver to the Authority an Exit Plan which sets out the Contractor's proposed methodology for achieving an orderly transition of Services from the Contractor to the Authority and/or its replacement contractor on the expiry or termination of this contract. The Plan will comply with the requirements set out below.

Within 30 days after the submission of the Exit Plan, the parties will use their respective reasonable endeavours to agree the contents of the Exit Plan.

The Exit Plan should contain as a minimum:

- The management structure to be employed during both the transfer and cessation of the services
- A detailed description of both the transfer and cessation processes, including a timetable.

### 9.3 Termination Services

During the termination assistance period or such shorter period as the Authority may require, the Contractor will continue to provide the services (as applicable) and will, at the request of the Authority provide the Termination Services. The Contractor will also provide any reasonable assistance to allow the services to continue without interruption following the termination or expiry of the contract and to facilitate the orderly transfer of responsibility for and conduct of the services to the Authority or replacement contractor.

Prior to the commencement of the termination service the parties will agree the costs of providing them. The costs shall be as agreed between parties no less than 3 months prior to

the end of the term or within one month of announcement of the contract termination and should underpin the Exit Plan.

During the termination period service levels should remain unaffected.

## Annex A – Evaluation Criteria

### I. Response to Requirement Statements

- a. This requirement is a multi-lot tender as follows; Lot 1 Hosting and Maintenance, Lot 2 Support, Lot 3 Development, Lot 4 Training and Lot 5 Website Development.
- b. Tenderers can respond to any lot or combination of lots.
- c. Tenderers must provide requirement statements in response to the questions below, to describe how they will meet the requirements of the contract.
- d. Tenderers are required to respond to all of the questions below. Questions should be answered in full and should not refer to other documents or appendices.
- e. Tenderers are referred to the Invitation to Tender and reminded that evaluation of their technical requirement statements will account for 60% of their total tender score. The only exception to this is Lot 1 for hosting and maintenance where the weighting is 50% for technical requirements statements and 50% commercial.
- f. All tenderers are to note - any tenderer whose tender submission scores 1 or below in any of the criteria will result (at CQC's sole discretion) in that tender submission not being taken forward.

### II. Weighting

#### Weighting for Lot 1= Tech 50% Commercial 50%

<b>Lot 1 Hosting &amp; Maintenance</b>	<b>Weighting</b>
Overview	15%
Data Centre Capability & Resilience	20%
Security	30%
Service Management	30%
Exit Management	5%
<b>Total</b>	<b>100%</b>

#### Weighting for Lot 2= Tech 60% Commercial 40%

<b>Lot 2 Support</b>	<b>Weighting</b>
Overview	15%
Support	15%
Security	15%
Development	25%
Service Management	25%
Exit Management	5%
<b>Total</b>	<b>100%</b>

Weighting for Lot 3 = Tech 60% Commercial 40%

<b>Lot 3 Development</b>	<b>Weighting</b>
Overview	15%
Development	50%
Security	10%
Service Management	20%
Exit Management	5%
<b>Total</b>	<b>100%</b>

Weighting for lot 4 = Tech 60% Commercial 40%

<b>Lot 4 Training</b>	<b>Weighting</b>
Overview	15%
Delivery Plan	50%
Evaluation	20%
Delivering User Feedback	15%
<b>Total</b>	<b>100%</b>

Weighting for lot 5 = Tech 60% Commercial 40%

<b>Lot 5 Website Development</b>	<b>Weighting</b>
Overview	15%
Development	50%
Security	10%
Service Management	20%
Exit Management	5%
<b>Total</b>	<b>100%</b>

### III. Evaluation Questions

You must score a 2 or above in all of the below evaluation criteria to be considered for this contract. Tenders will be scored using the following scoring model:

GRADE LABEL	GRADE	DEFINITION OF GRADE
Unacceptable	0	The response has been omitted, or the Tenderer proposal evidences inadequate (or insufficient) delivery of the requirement
Weak	1	The Tenderer proposal has merit, although there is weakness (or inconsistency) as to the full satisfaction of the delivery requirement
Satisfactory	2	The Tenderer proposal has a suitable level of detail to assure that a satisfactory delivery of the service requirement is likely.
Good	3	The Tenderer proposal has evidenced a level of understanding that assures there will be desirable value-add within the solution <b>or</b> superior and desirable (time or quality) delivery outcomes.
Excellent	4	The Tenderer proposal evidences significant levels of understanding <b>and</b> offers an <b>innovative</b> solution that includes desirable value-add to the Authority.

## Lot 1: Hosting and Maintenance

Section	Question
<p><b>Overview</b></p>	<ol style="list-style-type: none"> <li>1. Please provide a concise summary (with examples) highlighting the key aspects of your organisation telling us why you should be considered for hosting services and what separates you from your competitors.</li> </ol>
<p><b>Data Centre Capability &amp; Resilience</b></p>	<ol style="list-style-type: none"> <li>2. Please describe your experience of hosting CiviCRM and Drupal websites</li> <li>3. Please provide details of any sizing constraints for your hosted offering.</li> <li>4. Please provide details of where you would host the CRM and Drupal and provide details of accreditations and tiering for the proposed data centres. If different hosting solutions are offered for the CRM system and Drupal sites please provide your rationale.</li> <li>5. Are you network provider neutral? Can you work with any network carrier or do you have any commercial tie ins with any vendors?</li> <li>6. Please confirm your compliance with the Data Protection Act and how you remain compliant.</li> <li>7. Please provide details of your back up and archiving procedures. Plus how would you transfer existing back-ups and data archives?</li> <li>8. What are your plans for disaster recovery in the event of partial or total loss of data centre services?</li> <li>9. Please explain the measures in place to cope with power outages at one or more of your data centres. And when was the last time these plans were tested?</li> </ol>
<p><b>Security</b></p>	<ol style="list-style-type: none"> <li>1. Please describe the measures in place to protect the security of your clients' data.</li> <li>2. Please describe the physical security arrangements inside and outside your data centre(s).</li> <li>3. Please explain what security standards and checking procedures are applied to staff working in your data centres (e.g. BPSS).</li> <li>4. Please set out your confidentiality procedures for internal staff access to data and how will these procedures apply to any subcontractors you may utilise.</li> <li>5. How do you control which of your staff will have access to client data and what checks are in place to identify potential breaches?</li> </ol>
<p><b>Service Management</b></p>	<ol style="list-style-type: none"> <li>1. Set out your process and structure for managing the client engagement on an ongoing basis.</li> <li>2. Set out roles and responsibilities for all parties (Healthwatch and Supplier) in the service management process.</li> <li>3. Please set out your standard service and performance reporting methods and frequencies.</li> <li>4. Please list the availability of security and audit reports e.g. login fails, access to</li> </ol>

	administration accounts etc.
	5. Please describe the arrangements for a dedicated Service Management Manager or Team?
	6. What monitoring and recording of system access for your internal staff takes place?
	7. All calls relating to incidents, faults and problems with our CRM and websites are routed via our dedicated support lines. Describe how your Service Desk would interface with our support lines including how calls are received, progress reported, queries managed and ultimately closed.
	8. In the event of an incident with the production service, please describe your categorisation of the different severities of incidents, how you would respond and mobilise teams and the service levels that you expect to meet.
<b>Exit Management</b>	1. What is your process for contract exit arrangements and how will you work with us on that?

## Lot 2: Support

Section	Question
<b>Overview</b>	1. Please provide a concise summary (with examples) highlighting the key aspects of your organisation telling us why you should be considered for providing support for CiviCRM and Drupal and what separates you from your competitors.
<b>Support</b>	<ol style="list-style-type: none"> <li>1. Please describe your experience of providing support for CiviCRM and Drupal.</li> <li>2. Please describe your process for handling support enquiries, detailing how they are logged, escalated, resolved. In addition, please describe how emerging trends in support calls are identified and addressed.</li> <li>3. Please describe how you handle project management and forward planning</li> </ol>
<b>Security</b>	<ol style="list-style-type: none"> <li>1. Please describe the measures in place to protect the security of your clients' data.</li> <li>2. Please explain what security standards and checking procedures are applied to your staff (e.g. BPSS).</li> <li>3. Please set out your confidentiality procedures for internal staff access to data and how will these procedures apply to any subcontractors you may utilise.</li> <li>4. How do you control which of your staff will have access to client data and what checks are in place to identify potential breaches?</li> </ol>
<b>Development</b>	<ol style="list-style-type: none"> <li>1. Please describe your experience of providing development capability for CiviCRM and Drupal.</li> <li>2. Please provide details, including named examples, of delivering new functionality in CiviCRM</li> </ol>

	<ol style="list-style-type: none"> <li>3. Please provide details, including named examples, of delivering new functionality in Drupal</li> <li>4. Please explain your approach to development. Provide details of how you engage with the wider development community and your commitment to contributing to its development</li> <li>5. Describe your experience of developing applications using Agile methodologies (Scrum, DSDM etc.)</li> <li>6. Please describe experience of integrating CiviCRM with other applications</li> <li>7. Please describe experience of integrating Drupal with other applications</li> <li>8. Development of CiviCRM takes place through a mixture of staff from a number of suppliers and internal staff. Describe how you would manage this position, detailing the environments, processes and disciplines required and how work would be transitioned through those environments into live.</li> </ol>
<p style="text-align: center;"><b>Service Management</b></p>	<ol style="list-style-type: none"> <li>1. Set out your process and structure for managing the client engagement on an ongoing basis.</li> <li>2. Set out roles and responsibilities for all parties (Healthwatch and Supplier) in the service management process.</li> <li>3. Please set out your standard service and performance reporting methods and frequencies.</li> <li>4. All calls relating to incidents, faults and problems with our CRM and websites are routed via our dedicated support lines. Describe how your Service Desk would interface with our support lines including how calls are received, progress reported, queries managed and ultimately closed.</li> <li>5. In the event of an incident with the production service, please describe your categorisation of the different severities of incidents, how you would respond and mobilise teams and the service levels that you expect to meet.</li> </ol>
<p style="text-align: center;"><b>Exit Management</b></p>	<ol style="list-style-type: none"> <li>1. What is your process for contract exit arrangements and how will you work with us on that?</li> </ol>

## Lot 3: Development (CRM)

Section	Question
<p><b>Overview</b></p>	<ol style="list-style-type: none"> <li>1. Please provide a concise summary (with examples) highlighting the key aspects of your organisation telling us why you should be considered for providing development for CiviCRM what separates you from your competitors.</li> <li>2. Please outline your projections for company growth and stability, and your future roadmap. Please include the company's key strategic alliances and market strategy.</li> </ol>
<p><b>Development</b></p>	<ol style="list-style-type: none"> <li>1. Please describe your experience of providing development capability for CiviCRM.</li> <li>2. Please provide details, including named examples, of delivering new functionality in CiviCRM</li> <li>3. Please detail your experience of developing multiple CiviCRM instances, including details of how configurations are documented and source code is managed.</li> <li>4. Please explain your approach to development. Provide details of how you engage with the wider development community and your commitment to contributing to its development</li> <li>5. Describe your experience of developing applications using Agile methodologies (Scrum, DSDM etc.)</li> <li>6. Please describe experience of integrating CiviCRM with other applications</li> <li>7. Development of CiviCRM currently takes place through a mixture of staff from a number of suppliers and internal staff. Describe how you would manage this position, detailing the environments, processes and disciplines required and how work would be transitioned through those environments into live.</li> <li>8. Please outline your approach to testing (functional, regression, UAT, etc.) and quality assurance.</li> </ol>
<p><b>Security</b></p>	<ol style="list-style-type: none"> <li>1. Please describe the measures in place to protect the security of your clients' data.</li> <li>2. Please explain what security standards and checking procedures are applied to your staff (e.g. BPSS).</li> <li>3. Please set out your confidentiality procedures for internal staff access to data and how will these procedures apply to any subcontractors you may utilise.</li> <li>4. How do you control which of your staff will have access to client data and what checks are in place to identify potential breaches?</li> </ol>
<p><b>Service Management</b></p>	<ol style="list-style-type: none"> <li>1. Set out roles and responsibilities for all parties (Healthwatch and Supplier) in the service management process.</li> </ol>

	<ol style="list-style-type: none"> <li>2. Please set out your standard service and performance reporting methods and frequencies.</li> <li>3. All calls relating to incidents, faults and problems with our CRM are routed via our dedicated support lines. Describe how your Service Desk would interface with our support lines including how calls are received, progress reported, queries managed and ultimately closed.</li> <li>4. In the event of an incident with the production service, please describe your categorisation of the different severities of incidents, how you would respond and mobilise teams and the service levels that you expect to meet.</li> </ol>
<p><b>Exit Management</b></p>	<ol style="list-style-type: none"> <li>1. What is your process for contract exit arrangements and how will you work with us on that?</li> </ol>

## 4Lot Four: Training

Section	Question
<p><b>Overview</b></p>	<ol style="list-style-type: none"> <li>1. Please provide a concise summary (with examples) highlighting the key aspects of your organisation telling us why you should be considered for providing training for CiviCRM and what separates you from your competitors.</li> </ol>
<p><b>Delivery Plan</b></p>	<ol style="list-style-type: none"> <li>1. Please describe your experience of designing and delivering a training plan for CiviCRM administrators and users.</li> <li>2. Please provide details of the main areas of functionality within CiviCRM that you would include in your plan.</li> <li>3. Please explain your approach to training. Please detail the different delivery methods you would use in the execution of your delivery plan.</li> <li>4. Please detail what materials you would make available as part of your training delivery plan, including what format and mode of sharing and publication.</li> <li>5. Please detail how you would empower users trained to cascade their learning effectively to their colleagues.</li> </ol>
<p><b>Evaluation</b></p>	<ol style="list-style-type: none"> <li>1. Describe your approach to gathering, analysing and incorporating feedback from your training.</li> <li>2. Describe how you will share evaluation report summaries with us and at what frequency</li> </ol>
<p><b>Delivering user feedback</b></p>	<ol style="list-style-type: none"> <li>1. Training of the CiviCRM network will generate a lot of general user experience information which needs to be fed back to us. Please detail how you would capture and share that information with us.</li> </ol>

## Lot Five: Development (Web)

Section	Question
<p><b>Overview</b></p>	<ol style="list-style-type: none"> <li>1. Please provide a concise summary (with examples) highlighting the key aspects of your organisation telling us why you should be considered for providing development for Drupal websites and what separates you from your competitors.</li> <li>2. Please outline your projections for company growth and stability, and your future roadmap. Please include the company's key strategic alliances and market strategy.</li> </ol>
<p><b>Development</b></p>	<ol style="list-style-type: none"> <li>1. Please describe your experience of providing development capability for Drupal.</li> <li>2. Please provide details, including named examples, of delivering new functionality in Drupal</li> <li>3. Please detail your experience of developing Drupal sites for complex organisations, including details of solutions for sites with multiple editors and authors.</li> <li>4. Please explain your approach to development. Provide details of how you engage with the wider development community and your commitment to contributing to its development</li> <li>5. Describe your experience of developing applications using Agile methodologies (Scrum, DSDM etc.)</li> <li>6. Please describe experience of integrating Drupal with other applications.</li> <li>7. Describe your experience of migrating content from other CMS solutions into Drupal.</li> <li>8. Development of our Drupal website has led to a template version being made available to our wider network. Describe how you would manage this rollout, with particular detail on how you would ensure that the core offering of the site remains consistent..</li> <li>9. Please outline your approach to testing (functional, regression, UAT, etc.) and quality assurance.</li> </ol>
<p><b>Security</b></p>	<ol style="list-style-type: none"> <li>1. Please describe the measures in place to protect the security of your clients' data.</li> <li>2. Please explain what security standards and checking procedures are applied to your staff (e.g. BPSS).</li> <li>3. Please set out your confidentiality procedures for internal staff access to data and how will these procedures apply to any subcontractors you may utilise.</li> <li>4. How do you control which of your staff will have access to client data and what checks are in place to identify potential breaches?</li> </ol>
<p><b>Service Management</b></p>	<ol style="list-style-type: none"> <li>1. Set out roles and responsibilities for all parties (Healthwatch and Supplier) in the service management process.</li> <li>2. Please set out your standard service and performance reporting methods and frequencies.</li> <li>3. All calls relating to incidents, faults and problems with our website are routed via our</li> </ol>

	<p>dedicated support lines. Describe how your Service Desk would interface with our support lines including how calls are received, progress reported, queries managed and ultimately closed.</p>
	<p>4. In the event of an incident with the production service, please describe your categorisation of the different severities of incidents, how you would respond and mobilise teams and the service levels that you expect to meet.</p>
<p><b>Exit Management</b></p>	<p>1. What is your process for contract exit arrangements and how will you work with us on that?</p>

## Commercial Evaluation

### Introduction

The commercial evaluation for each lot will be evaluated based on a proportional verses best price formula outlined below and then added to the technical score to produce an overall score. For example for lot 1 (hosting and maintenance) the commercial weighting is 50% and price will be evaluated whereby the maximum points of 50% will be awarded to the lowest price as per the calculation below.

$$\text{Score} = \frac{\text{Lowest Tender Price}}{\text{Tender Price}} \times 50\% \text{ (the percentage is dependent on the lot in question)}$$

### Lot One – Hosting and maintenance

Please provide a fixed price (including VAT) for hosting and maintenance for the duration of the contract (1<sup>st</sup> February 2018 to 30<sup>th</sup> March 2019)

Price will then be evaluated based on a proportional verses best formula outlined above.

Please attach or use the additional information column in Bravo system to outline or add any supporting documentation to support your fixed price submission.

## **Lot Two - Support for Drupal websites and CiviCRM sites**

Based on the information outlined in this ITT and under lot 2, please provide a price (including VAT) for first, second and third line support (as listed below). Please also provide a day rate (including VAT) for consultancy services as outlined in the ITT under lot 2. The sum total of the support will be added to the consultancy charge to determine an overall price. Price will be evaluated based on a proportional verses best price formula outlined above.

- First line
- Second line
- Third line
- Consultancy charger per day

Please attach or use the additional information column in Bravo system to outline or add any supporting documentation to support your price submission.

## **Lot Three – Development of CiviCRM sites**

Based on the information outlined in this ITT and under lot 3, please provide a cost (including VAT) for development services based on your rate card and roles you would use to deliver development services. The cost of development will be used to evaluate price based on a proportional verses best price formula outlined above. Please attach or use the additional information column in Bravo system to outline or add any supporting documentation to support your price submission. We would also like you to include your rate card and roles as supporting information.

## **Lot Four – Training**

Based on the information outlined in this ITT and under lot 4 please provide a fixed price (including VAT) for training services for the duration of the contract (1<sup>st</sup> February 2018 to 31<sup>st</sup> March 2019). Price will then be evaluated based on a proportional verses best formula outlined above and added to the technical score to determine an overall score.



Please attach or use the additional information column in the Bravo system to outline or add any supporting documentation to support your price submission

**Lot Five – Development of Drupal site(s)**

Based on the information outlined in this ITT and under lot 5 please provide a cost (including VAT) for development services based on your rate card and roles you would use to deliver development services. The cost of development will be used to evaluate price based on a proportional versus best price formula outlined above and added to the technical score to determine an overall score.

Please attach or use the additional information column in Bravo system to outline or add any supporting documentation to support your price submission. We would also like you to include your rate card and roles as supporting information.

## **Appendices**

### **Appendix A: CQC Architecture Principles**



### **Appendix B: Brand Guidance**



## **SUPPLEMENTAL PROVISIONS**

The following supplemental terms and conditions shall apply to this Agreement and should be read together with the conditions of the call-off contract under the framework agreement.

### **Protection of Personal Data**

**The following supplemental provisions should be read together with Clause 15.7 of the call-off terms and conditions. These have been adapted in line with the effectivity of the new General Data Protection Legislation ("GDPR")**

1.1 The Parties acknowledge that for the purposes of the DPA, the Customer is the Controller and the Supplier is the Processor. The only processing that the Supplier is authorised to do is listed in Schedule 5 by the Customer and may not be determined by the Supplier.

1.2 The Supplier shall notify the Customer immediately if it considers that any of the Customer's instructions infringe the DPA.

1.3 The Supplier shall provide all reasonable assistance to the Customer in the preparation of any Data Protection Impact Assessment prior to commencing any processing. Such assistance may, at the discretion of the Customer, include:

- (a) a systematic description of the envisaged processing operations and the purpose of the processing;
- (b) an assessment of the necessity and proportionality of the processing operations in relation to the Services;
- (c) an assessment of the risks to the rights and freedoms of Data Subjects; and
- (d) the measures envisaged to address the risks, including safeguards, security measures and mechanisms to ensure the protection of Personal Data.

1.4 The Supplier shall, in relation to any Personal Data processed in connection with its obligations under this Agreement:

(a) process that Personal Data only in accordance with Schedule 5, unless the Supplier is required to do otherwise by Law. If it is so required the Supplier shall promptly notify the Customer before processing the Personal Data unless prohibited by Law;

(b) ensure that it has in place Protective Measures, which have been reviewed and approved by the Customer as appropriate to protect against a Data Loss Event having taken account of the:

- (i) nature of the data to be protected;
- (ii) harm that might result from a Data Loss Event;
- (iii) state of technological development; and
- (iv) cost of implementing any measures;

(c) ensure that :

(i) the Supplier Personnel do not process Personal Data except in accordance with this Agreement (and in particular Schedule 5);

(ii) it takes all reasonable steps to ensure the reliability and integrity of any Supplier Personnel who have access to the Personal Data and ensure that they:

- (A) are aware of and comply with the Supplier's duties under this clause;
- (B) are subject to appropriate confidentiality undertakings with the Supplier or any Sub-processor;
- (C) are informed of the confidential nature of the Personal Data and do not publish, disclose or divulge any of the Personal Data to any third Party unless directed in writing to do so by the Customer or as otherwise permitted by this Agreement; and
- (D) have undergone adequate training in the use, care, protection and handling of Personal Data; and

(d) not transfer Personal Data outside of the EU unless the prior written consent of the Customer has been obtained and the following conditions are fulfilled:

- (i) the Customer or the Supplier has provided appropriate safeguards in relation to the transfer (whether in accordance with GDPR Article 46 or LED Article 37) as determined by the Customer;
  - (ii) the Data Subject has enforceable rights and effective legal remedies;
  - (iii) the Supplier complies with its obligations under the Data Protection Legislation by providing an adequate level of protection to any Personal Data that is transferred (or, if it is not so bound, uses its best endeavours to assist the Customer in meeting its obligations); and
  - (iv) the Supplier complies with any reasonable instructions notified to it in advance by the Customer with respect to the processing of the Personal Data;
- (e) at the written direction of the Customer, delete or return Personal Data (and any copies of it) to the Customer on termination of the Agreement unless the Supplier is required by Law to retain the Personal Data.

1.5 Subject to clause 1.6, the Supplier shall notify the Customer immediately if it:

- (a) receives a Data Subject Access Request (or purported Data Subject Access Request);
- (b) receives a request to rectify, block or erase any Personal Data;
- (c) receives any other request, complaint or communication relating to either Party's obligations under the Data Protection Legislation;
- (d) receives any communication from the Information Commissioner or any other regulatory authority in connection with Personal Data processed under this Agreement;
- (e) receives a request from any third Party for disclosure of Personal Data where compliance with such request is required or purported to be required by Law; or
- (f) becomes aware of a Data Loss Event.

1.6 The Supplier's obligation to notify under clause 1.5 shall include the provision of further information to the Customer in phases, as details become available.

1.7 Taking into account the nature of the processing, the Supplier shall provide the Customer with full assistance in relation to either Party's obligations under Data Protection Legislation and any complaint, communication or request made under clause 1.5 (and insofar as possible within the timescales reasonably required by the Customer) including by promptly providing:

- (a) the Customer with full details and copies of the complaint, communication or request;
- (b) such assistance as is reasonably requested by the Customer to enable the Customer to comply with a Data Subject Access Request within the relevant timescales set out in the Data Protection Legislation;
- (c) the Customer, at its request, with any Personal Data it holds in relation to a Data Subject;
- (d) assistance as requested by the Customer following any Data Loss Event;
- (e) assistance as requested by the Customer with respect to any request from the Information Commissioner's Office, or any consultation by the Customer with the Information Commissioner's Office.

1.8 The Supplier shall maintain complete and accurate records and information to demonstrate its compliance with this clause. This requirement does not apply where the Supplier employs fewer than 250 staff, unless:

- (a) the Customer determines that the processing is not occasional;
- (b) the Customer determines the processing includes special categories of data as referred to in Article 9(1) of the GDPR or Personal Data relating to criminal convictions and offences referred to in Article 10 of the GDPR; and

(c) the Customer determines that the processing is likely to result in a risk to the rights and freedoms of Data Subjects.

1.9 The Supplier shall allow for audits of its Data Processing activity by the Customer or the Customer's designated auditor.

1.10 The Supplier shall designate a data protection officer if required by the Data Protection Legislation.

1.11 Before allowing any Sub-processor to process any Personal Data related to this Agreement, the Supplier must:

(a) notify the Customer in writing of the intended Sub-processor and processing;

(b) obtain the written consent of the Customer;

(c) enter into a written agreement with the Sub-processor which give effect to the terms set out in clause 15.7 and this supplemental provisions such that they apply to the Sub-processor; and

(d) provide the Customer with such information regarding the Sub-processor as the Customer may reasonably require.

1.12 The Supplier shall remain fully liable for all acts or omissions of any Sub-processor.

1.13 The Customer may, at any time on not less than 30 Working Days' notice, revise this clause by replacing it with any applicable controller to processor standard clauses or similar terms forming part of an applicable certification scheme (which shall apply when incorporated by attachment to this Agreement).

1.14 The Parties agree to take account of any guidance issued by the Information Commissioner's Office. The Customer may on not less than 30 Working Days' notice to the Supplier amend this agreement to ensure that it complies with any guidance issued by the Information Commissioner's Office.

## **CALL OFF SCHEDULE 1: DEFINITIONS**

**Data Protection Legislation or "DPA"** means (i) the GDPR, the LED and any applicable national implementing Laws as amended from time to time (ii) the DPA 2018 [subject to Royal Assent] to the extent that it relates to processing of personal data and privacy; (iii) all applicable Law about the processing of personal data and privacy;

**"Data Protection Impact Assessment"** means an assessment by the Controller of the impact of the envisaged processing on the protection of Personal Data.

**"Data Controller, Data Processor, Data Subject, Personal Data, Personal Data Breach, Data Protection Officer"** take the meaning given in the GDPR.

**"Data Loss Event"** means any event that results, or may result, in unauthorised access to Personal Data held by the Supplier under this Agreement, and/or actual or potential loss and/or destruction of Personal Data in breach of this Agreement, including any Personal Data Breach.

**"DPA 2018"** means Data Protection Act 2018

**"GDPR"** means the General Data Protection Regulation (Regulation (EU) 2016/679)

**"LED"** means the Law Enforcement Directive (Directive (EU) 2016/680)

**"Protective Measures"** means appropriate technical and organisational measures which may include: pseudonymising and encrypting Personal Data, ensuring confidentiality, integrity, availability and resilience of systems and services, ensuring that availability of and access to Personal Data can be restored in a timely manner after an incident, and regularly assessing and evaluating the effectiveness of the such measures adopted by it.

**"Sub-processor"** means any third Party appointed to process Personal Data on behalf of the Supplier related to this Agreement.

**CALL OFF SCHEDULE 5: SCHEDULE OF PROCESSING, PERSONAL DATA AND DATA SUBJECTS**

1. The Contractor shall comply with any further written instructions with respect to processing by the Customer.

2. Any such further instructions shall be incorporated into this Schedule.

Description	Details
Subject matter of the processing	Our systems process the public's experience of health and social care services
Duration of the processing	1 February 2018 to 31 March 2019
Nature and purposes of the processing	<p>Healthwatch England ("HWE") has been established under the Health and Social Care Act 2012 to be the consumer champion for health and social care in England. Its purpose is to strengthen the collective voice of patients and users of health and social care services and of the general public.</p> <p>To meet this statutory purpose HWE undertakes systematic processing of members of the public data including all operations standard to a Customer Relationship Management and associated web publication system. This includes collecting, recording, organising, storage, adaptation or alteration, retrieving, aggregation and dissemination.</p>
Type of personal data	The system will process personal data including name, address, date of birth, addresses including email, telephone numbers, images, personal medical information and IP addresses.
Categories of Data Subject	The system will process data related to staff, volunteers, members of the public, commissioners and other stakeholders.
Plan for return and destruction of the data once the processing is complete UNLESS requirement under union or member state law to preserve that type of data	The data will be retained in accordance with CQC retention policies.

## Suppliers Response to Requirements

### Overview

Northbridge Digital Limited is a founding CiviCRM partner company with over 10 years' experience of working with the CiviCRM and Drupal software packages. The contractor has been successfully devising and delivering the Healthwatch CiviCRM training programme for over 2 years.

The contractors staff know the CiviCRM system in great detail. Working as a CiviCRM implementation company means that the contractor knows every aspect of the system; from the codebase, to the database structure, all aspects of the graphical user interface and the feature sets.

Having project managed the roll out of over 100 CiviCRM systems the contractor knows the full range of issues which can occur during system use. Managing support queries of this nature generates a wealth of experience which is invaluable when delivering training to the local Healthwatch network. For each system implementation a bespoke piece of training has been created and delivered across a wide range of not for profit/voluntary sector organisation types.

The contractor knows how organisations like local Healthwatch operate and has worked with many other organisations of a similar scale (from the small 3-person local Healthwatch to the larger hosted organisations). They also understand how the Healthwatch network operates and the relationship between the local Healthwatch's and Healthwatch England. This knowledge is vital when it comes to discussions around; what Healthwatch England expect, how to develop an internal roll-out plan, what might be the barriers to use, how to encourage use after a period of inactivity, what procedures/protocols of use will work for specific organisation types and common internal roles and responsibilities etc.

The contractor's primary trainer, whilst being an IT professional, has both a statutory sector (7 years) and a charitable sector senior management background (7 years). This varied experience allows the trainer to communicate with local Healthwatch staff in clear non-technical language. For example, here is a link to a video of the trainer giving a general presentation on CiviCRM [www.youtube.com/watch?v=XxexhDSzSME](http://www.youtube.com/watch?v=XxexhDSzSME). This experience also gives the trainer the skills to interpret verbal or written issues by be able to put themselves in the role of the local staff member. The trainer also holds a PTTLs teaching adults qualification, [en.wikipedia.org/wiki/Preparing\\_to\\_Teach\\_in\\_the\\_Lifelong\\_Learning\\_Sector](http://en.wikipedia.org/wiki/Preparing_to_Teach_in_the_Lifelong_Learning_Sector), which helps give a proven structure to the course content and ensure training is appropriate.

The contractor also has experience of creating structured training plans. For example, the contractor worked with the CiviCRM core team to create a range of 1 and 2-day CiviCRM training courses around a structured syllabus, see:

<https://wiki.civicrm.org/confluence/display/CRM/Training>

The contractor has been involved in the Healthwatch England CRM project since its inception and has over 2 years' experience of delivering training to and working closely with Healthwatch. This means the contractor knows in detail which aspects of the Healthwatch CRM system are standard and which are custom. The contractor also crucially understands how this in practical terms affects the ways in which a local Healthwatch staff member can

use the system. For instance, at this time local Healthwatch staff cannot use the CiviEvent online registration feature due to recent permission changes around system security.

## **Delivery Plan**

### **1. Please describe your experience of designing and delivering a training plan for CiviCRM administrators and users**

The contractor has designed a number of CiviCRM training courses over a 10-year period. The training courses we design are of two different types.

The first type is where we provide a bespoke training course for a client. Many of these will be created and delivered at the end of a CiviCRM implementation project. Alternatively, we may be asked to provide general training consultancy (as we do for Healthwatch England currently). Often these training plans will be broken down into different elements with customised materials, for example; general staff training and introductions, training based on role or training the administrator. These can also be one off training programs or take place over a longer period with feedback and user experience being incorporated into the training workflow and content delivery.

In addition to these we have also worked to develop repeatable/structured training which we deliver to CiviCRM administrators across the UK, like this 2-day general CiviCRM administrator training course we delivered which took place earlier this year <https://civicrm.org/civicrm/event/info?reset=1&id=1034>.

To give an idea of the types of training plan the contractor has created please see the links to the course and syllabus details given below. The contractor worked with the CiviCRM core team to develop a range of 1 and 2 day CiviCRM courses based around a shared syllabus and interchangeable 1 hour sessions. Each session gives learning objectives, a step by step process, timings and has related exercises. These courses were developed for the use of the wider CiviCRM community as a trainer's resource. See: <https://wiki.civicrm.org/confluence/display/CRM/Training> and <https://wiki.civicrm.org/confluence/display/CRM/Events>

Whilst working with Healthwatch England the contractor has worked to improve the course content including helping to develop the new starter, refresher and single topic courses (like the new Reporting Webinar). When the content is being generated for each new course type the course content is written up, iterated and shared with the client. For instance, the following document link takes you to the Trainer course notes created for the New User Full Day webinar course run in October 2017 for the first time: <https://docs.google.com/document/d/18mi4IF5QLE3BUL5E9asTG4QsbPRIUX2VnXMomp82loY/edit?usp=sharing>

Up until recently the training delivered for Healthwatch England was demand-led. Healthwatch England would simply ask the contractor to go to a local Healthwatch or CQC office to deliver training. Healthwatch England staff collected feedback and the trainer also fed back to Healthwatch England. More recently the contractor has been asked to become involved in the development of an overall training plan. The contractor has been working with Healthwatch England staff to make initial changes, starting with a change to the delivery method. Over the past few months webinars have been used to deliver the training and the

results have been positive. The contractor can also now see the course feedback and adjustments to course content are being made accordingly. Discussions around a long-term training plan have taken place which could result in a combination of webinars (of various types), new and improved support materials and some face-to-face training. The contractor fully understands long term strategic plans, staging projects, making amendments based on feedback/being flexible, meeting deadlines and how to work with 3<sup>rd</sup> parties.

The training plans we create aim to take account of multiple learning styles (although this is harder via webinar delivery) and we make use of wider teaching principles. For instance, how best to get everyone's attention, address the room clearly, be concise and regularly check understanding. The contractor is always careful to explain difficult concepts by breaking them down into manageable and logical chunks of information. As a simple example, when discussing Events as the trainer you often need to talk about the ability to add your own custom fields. Therefore, logically the topic of how to add your own custom fields would have been covered at an earlier point in the training.

When producing exercises for learners we try and include those which will be easily achievable by most learners but will also include those that are challenging for more advanced users. The Healthwatch new user training handouts, which the contractor has been involved in developing are also distributed during each relevant training session and these explain key concepts. The contractor also reminds attendees of the other support resources available to them.

## **2. Please provide details of the main areas of functionality within CiviCRM that you would include in your plan**

For new user/full refresher training we would take a structured approach towards delivering the training. A 1-day training course (face-to-face or webinar) will start by introducing the core concepts of 'What is a CRM', 'What is CiviCRM' and 'How does this work in the Healthwatch context'. The day would then be broken down into 1-hour digestible chunks covering;

- Accessing the CRM (and Drupal Users for site administrators)
- The main contact screens, menus and contact summary page
- The concepts of relationships, groups, tags, notes and change log
- Activities and their uses
- The concept of Cases and the taxonomy
- The Healthwatch Consumer Feedback Wizard and
- Advanced searching and reporting; focusing on data added via the Wizard
- General day to day administrative tasks and exporting
- Managing Events
- How to administrate your CiviCRM system (administrators only)
- General discussion around organisational protocols for use, how to manage the CRM within your organisation, how to manage the system roll out, the existing data import process
- The data push and what HWE have access to

We may also include the following in 1-day new user training courses (if the situation arises) or more recently these have been topics within 1-hour long webinars attended by local Healthwatch staff.

- Mailings (covering the new drag and drop mailing function)

- Advanced importing and exporting
- Advanced reporting
- Awareness sessions covering upcoming new system features

As part of a long-term plan, to be devised with Healthwatch England staff, there may well be other functional elements which we would add later. As an example, it may be possible that a new website for local Healthwatch is introduced which interacts with the local Healthwatch's existing CiviCRM system. This would add new training topic areas.

The contractor knows well the restrictions of the CiviCRM system provided by Healthwatch England. This is not a standard CiviCRM installation and it is crucial that the contractor can explain to local Healthwatch staff how the Wizard operates in detail and what system functionality may not be available. This is especially important when local Healthwatch staff can access the standard CiviCRM documentation which may mention features they cannot access.

### **3. Please explain your approach to training. Please detail the different delivery methods you would use in the execution of your delivery plan**

When designing a new or editing an existing training program we take account of the ways in which different people learn. There are a range of notable learning style theories, like [https://en.wikipedia.org/wiki/Learning\\_styles](https://en.wikipedia.org/wiki/Learning_styles), with a focus on; visual, auditory and read/write learning. For example, a 1-day face-to-face training session is broken up into digestible 1-hour sessions. Each session will then include; A presentation (on-screen and presenter time) element and structured exercises which prompt learner discovery. Often learners are encouraged to work in pairs. This can foster discussion about how each feature relates to their own job and workplace. At the end of each session the trainer reiterates the primary concepts covered and prompts the learners to engage in reflecting how this may work within their own local Healthwatch.

Courses are informal yet follow the outlined structure. It is important that the trainer always sticks to the course timetable and that each course starts with a clear introduction and objectives which gives the learner a structure for the day.

In terms of types of training the different delivery methods would include;

#### **Face-to-face training – New users**

Possibly held at regional CQC offices such as the Newcastle office. This would be for new users (local Healthwatch's who are new to the CRM or new staff) or refresher training. These courses, currently running from 10am until 4:15pm, are a full introduction to the Healthwatch CRM system and include timed sessions, training materials and exercises. The contractor has to date been delivering these courses for Healthwatch England for 2 years.

#### **Webinar training – full day new user training.**

This would be for new users (local Healthwatch's who are new to the CRM or new staff) or refresher training. These day-long courses are a full introduction to the Healthwatch CRM system and include timed sessions, training materials and exercises. The contractor has to date delivered one course of this nature for Healthwatch England (October 2017). A new course syllabus was created which was shared with Healthwatch England staff. There are distinct advantages to running a course of this nature as a webinar, for example, time

efficiency for all parties. One of the challenges of this method however is there can be difficult to build a rapport with the attendees when compared to face to face learning. This is mitigated by the ability and experience of the contractor with delivering these sessions.

#### Webinar training – short single topic training sessions.

A number of 1-hour webinars have already been delivered by the contractor. One example is that we deliver over a single day, 4 single topic webinars. These have been intended for local Healthwatch staff who already know the CRM system. Sessions so far have included; Advanced reporting, importing, events and administrator training. Each session lasts for an hour and has a detailed syllabus. These webinars are easy to access, give learners detailed information on a single topic area and are an efficient way to impart focussed knowledge of the system.

#### Webinar training – awareness raising sessions

A number of 1-hour webinars have already been delivered by the contractor. One example is that we deliver 1 hour long awareness raising sessions. Each session has been focused on a new upcoming feature. These are ongoing and have been related to the new Wizard/Taxonomy changes and more recently the new Case screens. These have been intended for local Healthwatch staff who already know the CRM system. Feedback to date indicate these sessions are an excellent way to inform staff across a number of local Healthwatch of upcoming changes.

#### The Healthwatch conference

Part of the contract stipulation is that the contractor will attend the Healthwatch conference. For the past 2 years the contractor has attended the conference and has;

- Helped on a CRM 'helpdesk' answering specific questions
- Presented to a group of local Healthwatch staff

In future, delivering a CRM presentation in 2018 is another way in which the contractor can help train local Healthwatch staff.

#### Training Healthwatch England staff

The contractor will be able to give bespoke training to Healthwatch England staff. This could be;

- Face-to-face new User training with non-CRM team staff.
- Online/phone training to specific Healthwatch England staff members
- Online/phone training to Healthwatch England CRM staff team members

Other training delivery methods may be created, or variations on the above, and this will be part of a shared process between the contractor and Healthwatch England staff. A number of different methods have already been tried and lessons learned over the past 2 years. The future training plan will build on these lessons and recent positive changes to the training program which have taken place over the past few months.

#### **4. Please detail what materials you would make available as part of your training delivery plan, including what format and mode of sharing and publication.**

#### Videos – webinars

The webinars already mentioned above can, using the WebEx software used by Healthwatch England, be recorded and shared. We will ensure, in agreement with Healthwatch England, that suitable single topic webinars and awareness-raising sessions are recorded. The recordings can then be shared across the wider local Healthwatch network or/and by Healthwatch England staff and be added to the <https://support.healthwatchcrm.co.uk> website (or its successor system).

#### Videos – general

A number of support/training videos were originally created for Healthwatch England in 2015. These videos are, in some areas, starting to date as the system changes, and some should now be replaced. The contractor will, in conjunction with Healthwatch England staff, create a new range of videos for the support site. These videos will generally be short, concise and accessible. They are for general introductions to different features and will concentrate of the core areas of system use. These videos are currently published on <https://support.healthwatchcrm.co.uk> website (or its successor system).

#### Documentation (.pdf,.doc) – user exercises

The existing general user exercises will be further developed. This is especially important with the new move towards webinar-based CRM training. Whilst the existing exercises may be fit for purpose in terms of face-to-face training delivery they will require amendment. The exercises can be tested across users for suitability. User exercises could also be created for the shorter 1-hour webinars. This would be discussed in detail with the Healthwatch England team. These exercises will be distributed to training attendees, but could also be made available on the CRM support site.

#### Documentation (.pdf,.doc) – general explanatory documents and support site materials.

The support site existing material can be edited and added to. The current resources are reasonable and the new Healthwatch CRM lead has already started the process of editing these. The current ones do have practical screen shots and many are well written; The idea behind these resources is that they clearly explain a single concept within the system such as, 'Using the Pivot table'. These documents are currently published on <https://support.healthwatchcrm.co.uk> website (or its successor system).

Additionally, a 'key concepts' document is currently distributed to those attending the new user training. The content of this is quite robust but may require some attention to accommodate any system changes, (this was provided by Healthwatch England staff for distribution).

#### Documentation – the general CiviCRM documentation

Many local Healthwatch staff have accessed and query information they find in the general CiviCRM documentation. The contractor can see no issues with referring local Healthwatch staff to this material under the right circumstances See <https://docs.civicrm.org/user/en/latest>. For instance, the CiviCRM Event function found in the Healthwatch CRM has standard functionality. So, if an advanced local staff member wants to use CiviEvents in a complex way, they can be referred to the Events chapter of the standard CiviCRM online book.

The Healthwatch CRM can itself be adjusted so that the training and support materials are linked into the system itself. At the moment there is no link/connection from the Healthwatch CRM to the separate CRM support site. This can easily be remedied and expanded upon. A big

change would be to fully incorporate the training and support materials so they are available on the relevant page. For example, if you go to the Events Dashboard and you aren't sure what a CiviEvent is, simply click a clear link to watch an explanatory video.

Other learning materials could be developed, for example interactive quiz type learning forms, however these may not suit the nature of the material being discussed and may not be appropriate in all cases.

**5. Please detail how you would empower users trained to cascade their learning effectively to their colleagues.**

During staff training, whether its new user full day training or shorter single topic training, the idea of how to cascade this knowledge back to the local staff team can be embedded as part of the training.

Currently this is discussed during the training. Discussions take place on how attendees can cascade learning. We may talk about the available resources, whether they should break this up into chunks or what size of group will work best. This is done quite informally and individuals are encouraged to use their knowledge of each individual Healthwatch to ensure the information is cascaded in the most appropriate way.

Each training session will include a formal section as part of the training introduction on the most effective way for attendees to cascade information learning to colleagues; the format of each training can be adapted to suit the attendees but generally this will help to embed the idea that cascading learning to other staff is integral to the training. We will ensure that the training includes simple repeatable concepts and talk about how these may be passed on.

We should be aware that with cascaded content there is always the risk of dilution of key messages. To mitigate this risk the contractor/Healthwatch England staff can also ensure that the training attendees have easy access to corresponding resources which will make it easier for them to both train other staff and be something they can pass onto others if appropriate.

## **Evaluation**

### **1. Describe your approach to gathering, analysing and incorporating feedback from your training**

Currently after each training has taken place the training attendees are sent a copy of Healthwatch England's standard event evaluation online form. This is done by Healthwatch England staff. The evaluation data is then shared with the contractor for discussion. This process is recent and hasn't been formalised but the contractor believes this is likely to continue.

If the situation changes and the contractor is asked to collect the training feedback then the contractor will:

- Agree with Healthwatch England both the questions to be asked and make use of a form provided or create an appropriate online form. This could be added as simple Drupal form content to the CRM support site.
- After every online/webinar-based training all the training attendees will be sent a link to the online form asking them to provide feedback
- If training is face-to-face the form would be distributed in person with people being asked to complete the feedback form at the end of the session. This would have a higher response rate rather than an online form however there could be bias as often attendees may not want to be rude about the trainer who is giving them the form
- Face-to-face collection of feedback was used for the latest training sessions and the data was then collated by the contractor and sent to Healthwatch England staff.

Once data has been collected, using whichever method, this should then be shared with Healthwatch England staff. Some statistical data will be available as the current feedback forms include scores from 1 to 5 on a range of questions and over time adjustments can be made so that the efficacy of different aspects of the training can be improved. For instance, if there is consistent feedback saying the training was too long then efforts will be made to make the training quicker and more concise.

Qualitative feedback will also be available and analysed. When analysing this all parties must be aware that they don't give too much sway to one person's opinion as the range of learner's abilities and expectations is broad. For some people, a course may be boring and slow, yet another person would feel out of their depth on the same course.

One of the main aspects to consider is the course content and structure. This is hard to evaluate via single feedback as the learners won't have access to any other alternative approaches. Over time different approaches to course delivery can be tested; The resulting feedback will then inform all parties which training appears to be working best and for what reasons.

One possibility is that the contractor or Healthwatch England staff contact learners who made specific comments to obtain further clarification. That said, this may be currently as the current feedback method collects anonymous feedback data.

The contractor envisages regular joint discussion between the contractor's staff and Healthwatch England staff to discuss the results of incoming feedback. These would not be one off discussions; a general picture would be developed over time and adjustments made.

This medium-term approach to the feedback would allow for considered changes and adaptation of the course content/format over time. In addition, new types of training content or support materials may be developed based on implied demand.

**2. Describe how you will share evaluation report summaries with us and at what frequency**

As stated above currently the training feedback is collected by Healthwatch England staff directly. If the contractor did begin to collect the feedback data directly then we would recommend that an online form is created on the CRM support site or upcoming equivalent, or we could continue to make use of the Healthwatch England event evaluation form. Online learners would be directed to the form via email and if face-to-face feedback data was collected in person then this could be added by the contractor's staff via the shared online form. In this way all evaluation data, irrespective of the collection method, would be in a central/shared location.

In this circumstance the frequency would not be relevant as all parties would be able to access the data as it was collected.

## **Delivering user feedback**

- 1. Training of the CiviCRM network will generate a lot of general user experience information which needs to be fed back to us. Please detail how you would capture and share that information with us.**

Over the last 2 years the contractor has already fed back user experience data to the Healthwatch team. When the training first started approximately 2 years ago there was no regular aspect to this but over time it became clear that the training contractor has a great deal of responsibility to ensure this is collated.

- The contractor has an understanding of user requirements via the multiple in-depth discussions that take place with local Healthwatch staff.
- They are also 'using' the system when giving demonstrations to staff during training. This can bring to light issues with the system and inconsistencies.
- They are fielding complex questions from experienced system users which can highlight system inadequacies.

In order to make sense of this user experience data the contractor themselves needs to have enough system experience to be able to interpret the information, write this up clearly and feed this back to Healthwatch England staff.

The contractor has regularly fed back issues which have arisen. This has been done via email, phone and face-to-face. Some have been minor issues like a spelling mistake, some are issues involving permissions or where the system text is misleading or in error. The list of issues reported has been extensive and some but not all have been actioned. The user experience gathered may not just be about issues which arise- this could instead be positive responses to system changes or similar.

Formalising this process would be a positive development; For example, the contractor could ensure that after each training has taken place any resulting user experience is relayed to Healthwatch England staff. This could be done via email or be added to Basecamp. Another option is a use of a shared document, which can be jointly looked through during catch up meetings by both the contractor and Healthwatch England staff.



