# Procurement Specification for an Electronic Room Booking & Space Utilisation System for Derbyshire Community Health Services NHS Foundation Trust

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## Introduction

#### Derbyshire Community Health Services NHS Foundation Trust (DCHS) currently uses Workspace Manager for its room booking requirements. This system provides DCHS with a strategic overview and more efficient coordination of the bookable estate and its associated rooms. Also as the organisation moves towards more agile working it has the scope to effectively manage Hot-desks or hoteling to ensure that desks are ready for staff to work at when migrating from site to site or as part of their flexible working arrangements.

#### Our current room booking system will no longer be supported due to the migration to a new platform. It is therefore essential that DCHS find an alternative system and that all data be migrated so as to continue the benefits of a global room booking system.

#### DCHS also uses Planet FM to define all rooms/spaces across the Trust. This system is used to define which services are using non-bookable space. A system that combines bookable spaces with non-bookable spaces is required so that DCHS can fully analyse space utilisation across its entire estate.

## Scope

#### The supplier will need to supply to DCHS with a system that can cope with a large geographical area approx. 2500 km².

#### The system needs to efficiently support a large number of different site locations of varying sizes as detailed below:

#### 11 Community Hospital sites

#### Approximately 50 smaller Clinics and Health Centre sites

#### The system should be able to support at least up to 100 sites in order to allow for future organisational expansion.

#### The system will initially be required to support approximately 400 bookable assets including a combination of rooms and Hot-desks and any initial bid must be based around this figure. However, the system must be scalable should more rooms/hot-desks be required.

#### It is envisioned that over the next few years that the number of Hot-desks will increase rapidly as the organisation transitions to a greater focus in providing care in the home and flexible working, there may also be an increase in the requirements for the number of bookable rooms.

#### Therefore any bid must outline how future bookable assets can be added either by the supplier or by DCHS and any indicative associated costs with adding these assets.

#### The Room Booking System would need to allow all of the 4,700 (approximately) DCHS staff to be able to request a room and associated services.

#### The system would need to allow 15 room administrators to be able to modify room permissions add rooms and resources etc.

#### The system would need to provide full system administration access for system testing and problem solving etc. (to be done in conjunction with the supplier) for 3 system administrators.

#### The supplier will need to provide implementation support to DCHS. Providing any required consultation, project management, system adaptation and troubleshooting time required to implement a fully functioning Room Booking System. This needs to be detailed in any bid.

#### The supplier will need to work effectively Derbyshire Health Informatics Services (DHIS) (acting as the IT service agent on behalf of DCHS NHS Trust) to ensure the system is effectively rolled out across DCHS and its relevant IT infrastructure and devices, ensuring that any system issues are effectively and satisfactorily resolved for both DCHS NHS trust and DHIS producing a fully functioning system as outlined in this specification document.

#### If the system is hosted by DHIS the supplier will need to assist DHIS with installing any server software to satisfactory completion.

#### The supplier will not be expected to install the Room Booking System software on every device owned by DCHS NHS Trust however it will be expected to troubleshoot any installation issues to a satisfactory outcome and provide the relevant installation guides to DCHS/DHIS.

#### Derbyshire Community Health Services Trust will provide all room and booking data and any other necessary enabling information to the supplier. A minimum data set for bookable assets both Room, Hot-desks and any associated services equipment will need agreeing prior to procurement and the supplier will need to provide this information to DCHS as part of any bid to ensure that DCHS has the necessary data readily available to ensure a smooth and quick implementation. The supplier will also need to provide an indicative timetable of when and what data is required from DCHS.

#### Due to the diverse systems employed by DCHS the supplier will need to give assistance to the migration of existing room bookings from the current Workspace Manager system. The supplier will be expected to give guidance to DCHS on data migration as well as provide necessary tools and mechanisms to facilitate the efficient transfer of existing room bookings.

#### The system will need to hold all room information. Information should cover – but not be restricted to – all types of space (clinical, non-clinical, vacant, shared, occupied, etc.) in order for DCHS to be able to analyse space utilisation.

1.2.1.16 The system should allow for the easy updating of room information as services/staff move from one room/site to another.

#### The system will need to be implemented and fully functioning in its entirety within 10 weeks of procurement. Therefore the system will need to ready in a short period time and effectively be an off the shelf product. DCHS require full capability to be ready at the start and does not have the time for a lengthy development adaption process.

## Background

#### Derbyshire Community Health Services NHS Foundation Trust is a large and complex community health care trust coordinating community care over a large Geographical area which ranges from Swadlincote (South of Derby) in the South to the New Mills (bordering Stockport) in the North and from Long Eaton area in the East to Ashbourne area in the West, Community Care in the Derby City area is managed separately by another organisation.

#### DCHS employs approx. 4700 staff who work or are based at a variety of locations in both Hospital Sites and Clinics.

#### The site management is split in to 5 main localities with each area managed by a Locality Manager supported by Locality Leads and Sites and Services Managers (and associated administrators). The Localities are split in to Amber Valley area, Chesterfield area, High Peak and Dales, Ilkeston and Long Eaton (Erewash) area and North East Derbyshire.

#### The organisation is made up of several different services all requiring space within the organisation. The organisation also has a number of working relationships with other external health bodies as well as in certain locations providing support to local community groups and small businesses.

#### The organisation generates a large and varied portfolio of activities including: meetings, training, awareness events, clinics, one to ones, appraisals, and clinical consultations.

#### Although some of these are managed in rooms that belong to services on a permanent basis, activities also take place in shared bookable rooms. DCHS NHS trust wishes to ensure that these shared rooms are utilised correctly and to their maximum potential.

#### DCHS NHS Foundation Trust currently uses Workspace Manager, developed by Asure Software (People Cube), as a coordinated room booking system.

DCHS uses Planet FM to identify services within non-bookable rooms. A large number clinical and non-clinical services occupy rooms across the Trust.

## Service Conditions and Environmental Factors

#### The employees of DCHS are very busy and have a multitude of different tasks to complete within their working day. Large numbers of staff are clinically focused and therefore have little time for use of IT equipment. It is therefore imperative that any system procured provides a very easy to use and intuitive Graphical User Interface that completes tasks with minimal fuss and within a few clicks of a mouse. Ultimately the users must want to use the system and ideally resist the temptation to pick up the phone to make a booking. The system must also provide users with the correct amount information when and where they want it – users should not be partway through a booking to find out the room does not have a piece of equipment they require. The Room Booking Project requires at least 95% staff adoption of the system.

#### A large proportion of the workforce is community based and perform mobile and flexible working. It is essential that any booking system be accessible on any platform and any device and does not require the user to be logged onto the DCHS NHS network.

#### The Sites and Services teams with their associated administrators are also very busy so it is required that the system has a reasonable degree of automation sending emails and alerts to all necessary stakeholders. The system must also provide near real-time information without the need to be manually refreshed.

#### Due to the complex nature of DCHS and the many different services and types of room the system must be able to provide both provisional bookings (overseen by the Local Sites Admin) as well as confirmed booking simultaneously.

#### The system will also need to provide the enforcement of business rules to ensure that only specific users can book specific rooms and that other conditions such as time periods, maximum number of bookings can be applied to different users.

#### Due to the number of different services the system must be able to provide reports and financial information to allow internal recharging and for the generation of external invoices. Requesting budget codes and subjective codes as mandatory fields on bookings with services attached.

#### The system will need to provide the ability to identify an internal individual down to team level using drop down lists provided by DCHS.

#### Some staff may suffer from visual impairments or other disabilities therefore the supplier will need to demonstrate these considerations

## Required outputs and/or outcomes

#### The supplier will implement an easy to use and fully configured Room Booking and Hot-Desk management system to DCHS which can provide near real-time data and various booking authorisation processes.

#### The supplier will setup up the system with approximately 400 bookable assets with required associated information to allow all the current assets to be booked by staff negating the need for internal systems.

#### The system will allow approx. 4700 staff to book rooms to ensure that booking of rooms is widely available and to prevent staff from moving away from the system to book rooms/Hot-Desks

#### The system will be required to allow 15 administrators to simultaneously operate the administration area of the booking system: add manage equipment, update the status of rooms, and control/approve more complex clinical bookings where negotiation and human decisions need to be made.

#### Allow 3 system administrators to add assets, business rules and to test the system in conjunction with the supplier. Allow expandability of the system and the administrators trained in SQL to make minimal adjustments to the system where appropriate.

#### The system needs to produce reports to give a strategic overview of the bookable estate and its bookable room. Reports should be able give full utilisation figures, produce financial data, booking trend data, as well as report upon quality control information (for example how long a provisional room booking has been with an authoriser).

## Statement of Requirements and Performance measures

#### The suppliers will be asked to demonstrate their systems to DCHS and the procurement team for the project on a product evaluation day. On the evaluation day the supplier must give information on complying with the overall specification document and must demonstrate their system against the performance criteria outlined out in section 11.

## Targets

#### System to be successfully and fully implemented within10 weeks of the agreement being signed if this comes sooner.

## Management of the contract

#### Once the agreement has been signed the supplier will be required to manage the delivery of the contract and be responsible for meeting the overall deadline.

## The hand-over process

#### The fully functioning system will need to be fully handed over as an operational entity to DCHS by the project deadline, however it is a requirement that the system be piloted at a least one DCHS hospital site as soon as possible (or whatever is considered to be reasonable for the supplier to make any modifications without effecting the overall deadline).

## Best Value

#### The decision upon procurement will first be made upon the supplier demonstrating compliance with meeting the requirements of this specification document and then on the best value system for DCHS. Suppliers will be asked to demonstrate their systems to DCHS on set day to the procurement team.

#### The factors that will then dictate best value will be:

#### The initial procurement cost

#### On-going support/maintenance cost

#### Included benefits to system (i.e. those not included in the specification but will enhance the project outcome)

#### The potential cost of any additional assets over the next coming years

#### The ease and adoption cost of any future expansion (such as digital signage, kiosks, mobile devices, parking/visitor management) or further customisation for DCHS.

## Design and performance criteria

#### The system needs be designed as to so that any user familiar with the windows operating system/internet browser should be able to operate the system intuitively and complete tasks efficiently.

#### The system needs to allow a user to be able to complete a single room booking with services in less than 1 minute. A booking of a hot-desk also needs to be completed within a minute. Any supplier must demonstrate their compliance via a system demonstration prior to procurement.

#### The system needs to allow a user to be able to complete a complex repeat room booking in less than 7 minutes. Any supplier must demonstrate their compliance via a system demonstration prior to procurement.

#### The system needs to be able to categorise different room types such as clinical rooms, meeting rooms. The system needs to be able to filter by these categories.

#### Information needs to be logically and clearly laid out showing clear room information regarding availability, information about the room.

#### The system must allow the management of user access to bookable rooms and other bookable assets to use pre-determined business rules control how groups or single users can make bookings for example it may be applying a rule to govern a time period to the user or group as to when they can book a room or limiting the number of bookable (rooms/hot-desks) assets a user can book.

#### The system needs to allow administrators to control the necessary administration functions and with ability to add bookable assets, resources, business rules and up-load multiple room booking data with ease.

#### All data from the system needs be displayed to the users in real-time without requiring a manual refresh

#### Every bookable action must be able to generate an email to pre-defined user if capable the system should also send a system notification to the predefined user.

#### Any changes made to bookings should create a fully auditable and reportable log. The log should state time, date, users involved and the changes made, in order in the event of a service not being provided. This is to allow DCHS to examine the data to analyse as to why a booked service wasn’t provided etc.

#### The room booking system needs to allow the user to search and filter from area level to site level, floor level, room level and desk level. Users should be able to search upon room availability by features (such as equipment) as well as standard criteria such as capacity and room type.

#### The system needs to provide the ability to link identified bookable rooms together as part of one booking for a single purpose. This should be able to be applied as and when required.

#### The system needs to allow the user to complete a sequence of repeat room bookings of at least up to 100 bookings using one booking input screen and then manage this process in an intelligent way such as providing alternative times available for rooms that meet the users requirements and feeding back when there are no suitable rooms available within the sequence and providing appropriate feedback. All services should be linked to the sequence of repeat bookings made. For example if the room requestor wishes to book a clinic every Tuesday 10am-4pm for a year the system should facilitate this with one request screen and provide feedback/guidance if the room is unavailable at this time on any of the Tuesdays

#### The system will not allow double booking of rooms or Hot-desks.

#### The system needs to alert the identified administrator/authoriser via an email to a new provisional room booking request and allow them to link to the request on the system.

#### The system also needs to be able to provide a reminder report/email of provisional bookings to a pre-identified email address that have not been authorised every x minutes (x being a number defined by the system administrator) and provide an easy link to access the relevant bookings.

#### On a confirmation or decline of a booking the system needs to send an immediate email alert to the person requesting the booking as to whether the request has been successful or not allowing the administrator to provide a reason if the request is unsuccessful, if the request is successful the system should generate an email to the person requesting the room giving a full detailed summary of the booking.

#### The system needs to allow the system to provide contact details of the person/team confirming the booking and easy communication between the requestor and the person confirming the booking.

#### The system needs to be designed so room capacity is not exceeded and that capacity is linked to any different layout associated with that room.

#### The system will need to allow the selection of different room layouts the standard non clinical layouts it will need to include are Cabaret Style, Theatre Style, Hollow Square, Classroom Style, Boardroom Style, the system will need to allow the creation of custom room layouts. The room layouts should alter the maximum room capacity as specific to that layout. Examples of Rooms layouts are provided in appendix 1.

#### The supplier will need to respond to request for support from DCHS with a meaningful response within 7.5 hours. Simple queries should be resolved within 24 hours. Any bugs reported to be resolved within 5 days if this isn’t possible a full written reason must be provided to DCHS/DHIS with an estimated resolution date. Any alteration requests by DCHS to be responded to and a cost given within 10 days.

#### For future enhancements the supplier will need to demonstrate that they can provide realistic timescales and demonstrate that the system should allow a certain amount of configurability at a reasonable cost providing a fixed price daily rate

#### The system will need dedicated Hot-desk support to allow individuals to book vacant individual desks for their use in knowing the desk will be available when they arrive. The system must give a full clear and concise description of the equipment, network connections available (docking station, Wi-Fi, etc.) to enable users to get straight down to work. It must also allow hot desks to be automatically confirmed without authorisation. But provide an automated email to the room owner to alert to the use of that hot desk.

#### The system must be able to manage services such as catering giving a real-time update to the room requestor and the catering or portering staff involved as to the latest status of the required service.

#### The system must also be able to enforce minimum catering periods, by allowing the user to request catering, but alerting the user to the fact they are within the minimum time period allowed by DCHS and that the catering delivery could not be guaranteed and maybe subject to a surcharge. The system should send an email alert to the catering department stating that the catering is within the minimum time and ask as to whether they can respond to the request. The system will need to update the cost of the booking to ensure the surcharge is applied.

#### In order to facilitate ease of access to the system for all of DCHS staff the system should have the ability to allow DCHS to host a URL link in variety of places e.g. DCHS Intranet, DCHS internet, Estates Intranet, Share Point sites.

#### The system needs to allow DCHS to locally customise the homepage in order to add corporate logo, particular advice instructions, and links to policies and procedures etc.

#### The system needs to provide a reminder email to the room requester at point in time which can be defined by DCHS and changed by administrators. The email will be automatically generated at this time prior to any room booking to see if the requestor still requires the room. If not the system needs to provide an easy way for the requestor to cancel the booking.

#### The system must allow sets of and singular pieces of equipment to be effectively shared by multiple rooms the system needs to:

* 1. prevent double booking of this equipment
  2. monitor the amount of equipment being used
  3. provide an audit/trace of where the equipment was last booked out to

#### Be able to provide datasets such as Site Name, Room name, Room Number, Room Area (GIA)?? Allocated to room user, Allocation Type, Description of allocation type, Directorate, Service, Cost Centre.

#### The ability to search for rooms via a timeline option.

#### If a room is not available then a ‘best fit’ alternative should be offered.

#### Must be able to add additional fields and datasets to the system without the need to refer to supplier.

#### The ability to be able to easily take rooms offline (due to refurbishments, etc.)

#### An option looking at ‘flexible working search’ for colleagues would be desirable as he Trust moves towards more agile working.

#### The ability to add non-bookable (static) rooms to the system is essential. This should give DCHS the ability to assign multiple services/departments/staff to rooms. This function should be easy to manage and update and provide an analysis history, not just a snapshot of room utilisation.

#### The system must be able to produce quick and easy to use reports on finance charges, room utilisation and system audit information. There should be functionality for manipulating reports within the system’s reporting function and also the ability to export to Excel.

#### It would desirable that the system would allow room charges to be banded for example that all meeting rooms of a certain type could have one standard charge and clinical rooms of a certain type could have another without having to change the charges for each individual room.

#### It would be desirable if the system would allow an online evaluation process to take place in order to gain feedback upon rooms and their facilities and general state.

## Training

#### The supplier will be expected to provide training to the administrators of the system and provide reference material as part of this training.

#### User documentation must be provided in order for the room requestors of the system to be able to reference should they need support and administrators should receive enough information to ensure they can answer any queries.

## Compatibility and Technical Requirements

#### The room booking system will need to be compatible with the devices used by DCHS this will be in the main:Desktop computers running Microsoft Windows 7 and Microsoft Office 2010, Android, and iOS devices.

#### The system should have the provision to support tablet computers running Android 4 and above - browser compatibility will be sufficient browsing should support mobile as well as full desktop browsing on these devices

#### The system should have the provision Blackberries, iPads and iPhones, Android devices. Again appropriate browser access will be acceptable

#### If the proposed Room Booking Software is to be hosted by the supplier or third party then the supplier must work with DHIS to ensure access via any firewall or security mechanisms. Access to data must be guaranteed to DCHS at all times although direct access via the system may be limited in the case of system downtime outlined below. Evidence of this must be given in the bid.

#### If the Room Booking Software is to be hosted by DHIS on behalf of DCHS NHS Trust then any server based software must be compatible with DHIS servers.

#### Any support required by DHIS to allow remote access (working at home) by DCHS staff must also be given by the supplier.

#### If the supplier is hosting the Room Booking Software the supplier and any third party must demonstrate that they are keeping the data safe and secure with any appropriate backup systems in place.

#### If the supplier requires any system downtime this should be limited to outside normal working hours 8:30-5:30 or weekends and the supplier should give at least 7 days written notice to DCHS. If significant downtime is required i.e. any time that would affect normal working or any time exceeding 6-8 hours this must be discussed and agreed with DCHS. DCHS would expect downtime periods to be limited to a maximum of 3 -5 times per calendar year.

## Whole life support

#### The supplier must demonstrate within the bid an annual costs for on-going support and maintenance and what this includes

#### The supplier must demonstrate both current and future financial stability demonstrating current clients, turnover, history and other relevant information.

#### The supplier must be able to demonstrate that the system is of sufficient focus of their business that the system will be supported, upgraded for the foreseeable future up to at least 10 years.

#### The supplier should outline any current existing system upgrade plans and schedules providing any significant upgrade plans. The supplier should work with DCHS to review the system and when suitable upgrades are available allow DCHS to review and if there is a cost to the upgrade negotiate on the price.

## Security

#### The supplier and any third party must guarantee data privacy and security.

#### DCHS will need to be assured that any data held by the supplier or a third party will be protected by the necessary redundant systems.

#### Use of the system must not further increase the threat of unauthorised external access to DCHS/DHIS systems or data.

#### The supplier will need to ensure that the system availability is guaranteed other that any required downtime.

## Definitions

#### Derbyshire Community Health Services National Health Services, Trust Derbyshire Community Health Services NHS Trust, DCHS all refer to the customer

#### Derbyshire Health Informatics Service, DHIS is the support IT organisation for Derbyshire NHS Trust and as such provides all necessary hardware and software support to DCHS.

#### The user/requestor – is the member of staff, wanting to book a room/Hot-desk or look for room/desk availability

#### Assets or bookable assets – refer to rooms, or hot-desks that need to be managed by the system.

#### An Administrator – is a user of the system that needs to modify data such as equipment available, room availability as well being able to authorise provisional bookings.

#### A system administrator – is a user of the system that will need to be able to add assets, change business rules and user permissions.

#### Where the terms “needs” and “must” – these are requirements as to where DCHS views these to be completely essential and the supplier or the system must perform or deliver.

#### Where the term “should” – anything the system should be expect to but not entirely essential

#### Where the terms “expect” or “expected” this is anything Derbyshire Community Health Services NHS believes will be included by the supplier or system or should take place. If this is not the case the supplier should make DCHS aware as part of the procurement process.

Appendix 1

|  |  |  |
| --- | --- | --- |
| Theatre  Theatre | U-Shape  U-Shape | Cabaret Cabaret |
| Layout 1 | Layout 2 | Layout 3 |
| Classroom  Classroom | Hollow Square  Hollow Square | Boardroom  Boardroom |
| Layout 4Simon\_Mugford Page 20 13/11/2017 | Layout 5 | Layout 6 |
| Resus  Resus Layout Picture  Leave For Space |
| Layout 7 Custom layout  **Layout 8 Induction/Essential – custom layout or Cabaret with Large Tables** |

Offer schedule

004686/T/MT

|  |  |
| --- | --- |
|  | Cost |
| Purchase Cost of System |  |
| Set-up Costs |  |
| Training Costs |  |
| Data conversion for old system to new |  |
| On-going support / maintenance Per Year |  |
| Total Cost |  |

Extra’s functions may submitted on supporting documentation

Evaluation Criteria

**The Contract will be awarded on the basis of the most economically advantageous offer judged on price, quality, delivery performance, risk and overall cost effectiveness. These factors are not listed in any particular order of importance.**

|  |  |
| --- | --- |
| Criteria | Weighting (%) |
| Technical/Operational Specification | 40 |
| Price | 30 |
| Support/Training/Maintenance & Installation | 20 |
| Delivery | 10 |