23/12/2016

Dear Bidders,

**Request for Quotation: Cloud-Based Document Storage, Sharing and Collaboration Tool for the North Central London Sustainability and Transformation Plan, NELCSU/CAM/DL/PRJ393**

I am writing to you on behalf of Camden Clinical Commissioning Group (the CCG). We currently have a requirement for a **Cloud-Based Document Storage, Sharing and Collaboration Tool to support delivery of the North Central London Sustainability and Transformation Plan.** The requirements of this system are set out in Annex A.1 to this RFQ letter.

We need our chosen supplier to deliver the core system by the end of January 2017, i.e. authorised system users will need to be able to access the system and upload, download, share and edit documents. Full migration of existing PMO and work-stream documents onto the platform will take place during January-February 2017.

Competitive quotations are required based on the following contract duration:

2 years with an option for a 1 year extension.

Please note the attached ‘NHS Terms and Conditions for the Supply of Goods and Provisions of Services (Annex B)’ will apply to any contract awarded as a result of this quotation exercise.

If you are interested in quoting for this requirement, please reply to the following email box [Clinical.Procurement@nelcsu.nhs.uk](mailto:Clinical.Procurement@nelcsu.nhs.uk) **by 10:00 am on 13/01/2017** with the following information:

* A completed bid response sheet (Annex A.2);
* Confirmation of acceptance of the terms and conditions of contract (Annex B);
* Total price excluding VAT (Annex C);
* Conflict of Interest Declaration (Annex D).

The CCG is seeking quotations from a number of suppliers. The following scoring criteria will be used to select the successful supplier:

| Section | Evaluation Criteria | Weight |
| --- | --- | --- |
| **1** | **General information** | **N/A** |
| **2** | **Pass/Fail criteria** | **Pass / Fail** |
|  | 2A System Security / Information Governance | Pass / Fail |
|  | 2B Company Financial Standing | Pass / Fail |
|  | 2C System Reliability and Performance | Pass / Fail |
|  | 2D Capacity to Deliver | Pass / Fail |
|  | 2E Relevant Experience | Pass / Fail |
| **3** | **Software requirements** | **80%** |
|  | 3A Functionality | 40% |
|  | 3B User Interface/Experience | 20% |
|  | 3C System Flexibility | 20% |
| **4** | **Other Information** | **N/A** |
| **5** | **Price** | **20%** |
| **Total** |  | **100%** |

Each of scored section in Table 1 will be scored based on Table below.

**Table 2: Scoring criteria**

|  |  |  |
| --- | --- | --- |
| **Score** | | **Definition** |
| 0 | Non-compliant | No response or partial response and poor evidence provided in support of it.  Does not give the commissioner confidence in the ability of the Bidder to deliver the Contract. |
| 1 | Weak | Response is supported by a weak standard of evidence in several areas giving rise to concern about the ability of the Bidder to deliver the Contract. |
| 2 | Minor reservations | Response is supported by a satisfactory standard of evidence in most areas but a few areas lacking detail/evidence giving rise to some concerns about the ability of the Bidder to deliver the Contract. |
| 3 | Compliant/Good | Response is comprehensive and supported by good standard of evidence. Gives the commissioner confidence in the ability of the Bidder to deliver the contract. Meets the Commissioner’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the Commissioner a high level of confidence in the ability of the Bidder to deliver the contract. Exceeds the commissioner’s requirements in some respects. |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the Commissioner a very high level of confidence the ability of the Bidder to deliver the contract. Exceeds the Commissioner’s requirements in most respects. |

**The Quotation must be submitted in a PDF format, with pricing submitted in a separate file. Quotations received after the above date and time may not be considered.**

*It would be appreciated if you could advise,* within 3 working days of receiving this RFQ*, if you intend to submit a bid or your reasons for not submitting a bid.*

If the panel feels at any point that there is not sufficient evidence to score a bidder on any evaluation point then they may, at their discretion, seek clarification from any and all bidders. Bidder clarifications will at all times take account of the commercial confidence of bidders.

If a bidder scores a ‘0’ on any sub-section then they may be eliminated at the discretion of the panel, dependent on how service-critical the panel deems that sub-section to be. If a bidder scores ‘0’ on an entire section of the evaluation, the bidder will be automatically eliminated from any further evaluation.

The pass-mark for the qualitative evaluation (evaluation criteria 3) element is **12 out of 25 points for the** **‘3A Functionality’ component**. If a bidder does not attain this score overall then their bid will automatically be rejected. This process ensures that NEL Commissioning Support Unit and Camden CCG attain a minimum acceptable service quality. The three highest scoring bidders will be shortlisted and invited to give a demo of their system to an Evaluation Panel *on* **19 / 20 January 2017.** The successful bidder will be chosen based on the score obtained through the response to this RFQ plus the scores for ‘3B User Interface/Experience’ and ‘3C System Flexibility’, which will assessed via the demo.

In the event of a tie (where two or more top scoring Bidders had the same total weighted score including both quality and price), the CCG will select from amongst those Bidders, the submission of the Bidder with the highest weighted score for ‘3A Functionality’.

Your response must be valid for acceptance for 90 days from the deadline for receipt of quotations. Your response constitutes an offer and if Camden CCG accepts that offer then a legally binding contract will exist between us.

Respondents accept that the Camden CCG is subject to the Freedom of Information Act and government transparency obligations which may require Camden CCG to disclose information received from you to third parties.

This RFQ letter and your response do not give rise to any contractual obligation or liability unless and until such time as Camden CCG issues a letter referencing this Request for a Quotation with a signed contract and a valid Purchase Order number accepting your quotation. Camden CCG does not make any commitment to purchase and shall have no liability for your costs in responding to this Request for a Quotation.

## Canvassing and contacts

Bidders shall not in connection with this Procurement:

* Offer any inducement, fee or reward to any officer or employee of NELCSU, Camden CCG or NCL STP or any person acting as an advisor to NELCSU , Camden CCG or NCL STP in connection with this Procurement
* Do anything which would constitute a breach of the Bribery Act 2010
* Canvass any of the persons referred to above in connection with the Procurement

No attempt should be made to contact NELCSU, Camden CCG or NCL STP staff,except the NEL Commissioning Support Unit Project Team, or to contact NELCSU / Camden CCG / NCL STP or NELCSU / Camden CCG / NCL STP advisers or other NHS/DoH bodies as part of the procurement process. Any enquiries made to persons other than the NEL Commissioning Support Unit Project Team will be regarded as prima facie evidence of canvassing.

## Conflicts of interest

In order to ensure a fair and competitive procurement process, Camden CCG requires that all actual or potential conflicts of interest that a potential bidder may have are identified and resolved to the satisfaction of the CCG.

Potential Applicants should notify the CCG of any actual or potential conflicts of interest in their response to the RFQ. If the potential bidder becomes aware of an actual or potential conflict of interest following submission of the application it should immediately notify the CCG by completing the Conflict of Interest form (see Annex D) for this procurement. Such notifications should provide details of the actual or potential conflict of interest.

If, following consultation with the potential bidder or bidders, such actual or potential conflict(s) are not resolved to the satisfaction of the CCG, Camden CCG reserves the right to exclude at any time any potential Applicants(s) from the Procurement process should any actual or potential conflict(s) of interest be found by the CCG to confer an unfair competitive advantage on one or more potential bidder(s), or otherwise to undermine a fair procurement process.

Examples of potential conflicts of interest are (without limitation) as follows:

* A Bidding organisation, or any person employed or engaged by or otherwise connected with a Bidding organisation, is currently carrying out any work for the CCG, NHS England and/or the Department of Health (DH), or has done so within the last six (6) months;
* A Bidding organisation is providing services for more than one Potential Bidder, in respect of this Procurement.

The ‘Conflict of Interest Declaration’, provided in Annex D, must be completed by an authorised signatory, in his / her own name, on behalf of the Bidding organisation and attached in response to this section of this RFQ.

The CCG should be immediately notified, in the event that any actual or potential conflict of interest comes to a potential Bidder’s attention at any time following the submission of the potential Bidder’s ‘Conflicts of Interest Declaration’ and bid documents.

If you have any queries about this letter or the requirement, please contact the under signed at [Clinical.Procurement@nelcsu.nhs.uk](mailto:Clinical.Procurement@nelcsu.nhs.uk)

If you are unable to meet this requirement or are otherwise not intending to provide a quote, I would be grateful if you could let me know as soon as possible.

Yours sincerely,

Jean-Claude Simba pp

Darren Lewis

Interim Senior Procurement Manager

NEL Commissioning Support Unit

**Annex A.1**

**Specification / Project Brief**

**For**

**Cloud-based File Storage/Sharing and Document Collaboration Tool for the North Central London STP**

## Introduction:

The North Central London STP Programme Office is looking to procure a Document Collaboration and Programme Management tool to help support the delivery of the local Sustainability and Transformation Plan (STP). The system will be used by the central Programme Management Office and by each of the 12 STP work-streams’ Senior Responsible Owners, Programme Managers and delivery teams. The intended users are located at different sites and employed by various organisations and the main purpose of the system will be to facilitate document collaboration, file sharing and communication between these users, whilst ensuring robust data security and information governance.

## Context / Statement of Need

Working across a large number of different sites and organisations (please assume 20 organisations for pricing purposes) without a common file storage, sharing and collaboration system currently gives rise to a number of challenges, risks and issues, which need to be addressed to enable effective delivery of the plan, e.g.:

* Ensuring timely access to documents and effective collaboration on documents is currently difficult due to their being stored at different organisations and locations. Documents are currently shared and collaborated on via email, giving rise to delays, version control issues and duplication of work;
* Numerous versions of particular documents can be in existence at any one point, making it difficult to ensure robust document workflow and governance or to maintain a coherent audit trail of significant changes and approval histories. A document collaboration system could help ensure that there is a ‘single version of the truth’ and promote improved governance;
* There is a risk that key programme information may become lost / irretrievable if and when key staff members leave the programme as files are currently being stored in various places, including individual work computers;
* Linked to the above, there is currently a risk that staff who leave the programme may continue to have access to sensitive programme information after they have left. A centralised storage and collaboration system with robust access and permission controls will help to improve information governance and help ensure that access to sensitive documents is revoked once an individual leaves;
* The current practice of transferring files between organisations presents a risk that sensitive information can be intercepted. Ensuring that all documents are stored, accessed and edited via a secure portal will reduce this risk; and
* In addition to helping to resolve challenges in relation to document storage, sharing, collaboration, workflow and governance, there is a potential for a chosen solution to help to streamline and automate some of processes and controls used to manage the delivery of the STP e.g. though features such as shared calendars, task assignment, approval requests, template storage, automated notifications and document workflow.

## Objectives:

In light of the above concerns, the STP Programme Office requires a system that can deliver the following benefits:

**Objective 1: To improve document security, control and governance** – ensuring that specific documents are readily accessible, but only by intended audiences.

**Objective 2: To improve document storage arrangements** – ensuring that documents are located in a central place, enforcing strict version control and maintaining an audit trail of changes.

**Objective 3: To facilitate collaboration on documents across organisational boundaries –** ensuring thatchanges are synched effectively and enabling contributors to communicate effectively with one another in relation to the document.

**Objective 4: To enhance document workflow** – allowing users to establish clear approval processes and maintain an audit trail of approvals.

**Objective 5: To enhance security around sharing of documents** – enabling users to refer each other to documents stored securely on the platform and enabling a small group of authorised users to share appropriate documents with non-users of the system.

## Governance

The provider will need to comply with the information governance and ICT standards and policies of the public sector organisations whose staff will be using the system. For this reason, demonstrating extensive experience in providing the solution to UK public sector organisations (in particular NHS Organisations) has been set as a ‘Pass / Fail’ criterion as part of the assessment process.

## Proposed Timetable

|  |  |
| --- | --- |
| Deadline | Milestone |
| **10am, 13 January 2017** | **Deadline for responses** |
| 5pm, 17 January, 2017 | Suppliers shortlisted and notified |
| 19, 20 January 2017 | Demos by shortlisted candidates |
| 5pm, 20 January 2017 | Successful supplier chosen, suppliers notified of outcome |
| 23 January 2017 | Project initiation meeting with chosen supplier |
| 31 January 2017 | Core system ‘go-live’ |
| 28 February 2017 | Deadline for users to upload programme documents to the system. |

**Annex A.2**

**CLOUD-BASED DOCUMENT STORAGE, SHARING AND COLLABORATION TOOL FOR THE NORTH CENTRAL LONDON SUSTAINABILITY AND TRANSFORMATION PLAN**

**RFQ RESPONSE DOCUMENT**

**OUR REFERENCE:**

**[INSERT SUPPLIER NAME]**

*This template sets out the key bid information to be provided by the supplier as part of their response. Suppliers should ensure that they have read the Request for Quotation (RFQ) document and Annex A.1 before completing this template.*

1. **GENERAL INFORMATION**

* Full name and address of supplier, our reference number and your contact details

[Insert details]

1. **PASS/FAIL CRITERIA**

**2A System Security / Information Governance (PASS/FAIL)**

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2A.1** | * The system must protect the data and services from unauthorised access adopting a 2-tiered protocol as a minimum i.e. username and password. Include a statement of security standards and policy and evidence of that product/service will be safe, secure and compliant with information governance (IG) standards. * System supplier to hold an ISO certificates (i.e. ISO 27001, ISO 9001), or equivalent. * Provision of Cyber Security compliance to a minimum of CESG standards      * System to be checked annually against "Penetration Test" standards for security covering both technical and social attacks. * The system will be cloud-based with all of the information stored remotely in a secure cloud based location to be accessed as necessary by the STP and its partners as required. All data is to be held in the UK - any access outside of UK/EEA (including potential) must be approved by the CCG. | **PASS/FAIL** |
| **Supplier Response** | | |
| [Insert details] | | |

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2A.2** | Please confirm your agreement to the following statement:  Information held on the system is owned by the CCG and subject to the following conditions:   * Confidentiality - information is not disclosed to individuals or systems that are not authorised to receive it * Integrity - information cannot be modified by those who are not authorised to modify it. Modifications cannot pass undetected * Availability - information is available when it is needed. Mishap or malice cannot affect the ability of systems to provide information when requested | **PASS/FAIL** |
| **Supplier Response** | | |
| [Insert details] | | |

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2A.3** | Please provide copies of the documents below, or alternatives where appropriate:   * ISO 27001 (or equivalent) certificate * Your company’s information security and information governance policies * Copy of your most recent “penetration testing” | **PASS/FAIL** |
| **Supplier Response** | | |
| [Insert details] | | |

**2B Company Financial Standing (PASS/FAIL)**

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2B.1** | Please provide details of your company accounts history. This must be based on your audited accounts where available (draft accounts are acceptable where audited accounts are not available). In addition if the Tendering Organisation is a subsidiary of a group, the information requested is required for both the subsidiary and the ultimate parent.  Please attach the audited accounts for the last two (2) financial years. This must include at a minimum the Balance sheet • Profit and Loss Account/Cost of sales • Full notes to accounts • Directors/Auditors report (where applicable)  If you do not have audited or unaudited accounts please supply;   1. A statement as to why these are not available, 2. Projected values for the latest financial year, as requested in the attached template (Please insert values into the attached template), 3. Any other relevant information pertaining to the financial viability of the applicant, which may include but is not limited to: a) Accountant’s Reference, b) Management Accounts and c) detail and evidence of current contracts, including contract values   Depending on your response, we may need to request additional information from you or in fact meet with you directly to gain further clarification.  Duly completed template, requested audited accounts and any other information requested in the question must be attached in response to this question. | **PASS/FAIL** |
| **Supplier Response:**  *Pass = Accounts are up to date or information has been supplied in lieu of audited accounts and minimum threshold and pass score has been achieved.*  *Fail = Accounts are not up to date or information has not been supplied in lieu of audited accounts and minimum threshold and pass score is not achieved.* | | |
| [Insert details] | | |

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2B.2** | If the accounts that you are submitting are for a period which ended more than ten months ago, please confirm that the applicant as described therein is still trading and provide details of actual financial performance and position since the last set of published accounts.  These details are expected to be the same as is required in question 2B.2 i.e. Turnover; Net profit; Net Assets etc. | **PASS/FAIL** |
| **Supplier Response:**  *Pass = Accounts are up to date or information has been supplied in lieu of audited accounts and minimum threshold and pass score has been achieved.*  *Fail = Accounts are not up to date or information has not been supplied in lieu of audited accounts and minimum threshold and pass score is not achieved.* | | |
| [Insert details] | | |

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2B.3** | Please provide details on any outstanding claims or litigation, or potential litigation of which the person submitting the bid may be or should be aware (this is for situations not covered by insurance). The bidder must provide details of type of claim, estimated monetary value and probability of claims being paid. | **PASS/FAIL** |
| **Supplier Response:**  *Pass = Bidder is not deemed to have a large number of claims or a few claims of monetary value that could compromise performance of the bid.*  *Fail = Bidder is deemed to have a large number of claims or a few claims of monetary value that could compromise performance of the bid. Bidder is deemed to have large number of claims or a few of monetary value that could compromise performance of the bid* | | |
| [Insert details] | | |

**2C System Reliability and Performance (PASS/FAIL)**

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2C.1** | Please provide copies of   * System performance reports demonstrating system availability over the last 6 months * Your company’s Disaster Recovery Plan * Any bandwidth requirements to ensure reliable and fast system performance | **PASS/FAIL** |
| **Supplier Response:**  *Pass = Fully compliant and evidence provided to support compliance.*  *Fail = No information provided or the information provided is inadequate.* | | |
| [Insert details] | | |

**2D Capacity to deliver**

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2D.1** | Please provide a delivery schedule for the setup, configuration and rollout of your system, assuming a project initiation date of 23 January. As part of your response, please also provide details of any client input / resources you will require e.g. documentation, in-house ICT department support, etc. | **PASS/FAIL** |
| **Supplier Response:**  *Pass = Deliverable within required timescales. Does not require significant CCG resources (e.g. IT support) to implement.*  *Fail = Not deliverable within required timescales. Implementation likely to require significant additional resources (e.g. IT support) which may not be available.* | | |
| [Insert details] | | |

**2E Relevant Experience**

|  |  |  |
| --- | --- | --- |
| Ref | Requirement | Scoring |
| **2E.1** | Please provide examples / case studies of similar services provided to other public sector organisations, with a particular focus on examples of other NHS organisations.  Please provide details of two referees who can be contacted as part of the assessment process.  Please provide a list of any local authority or NHS organisations within the NCL area (Barnet, Enfield, Haringey, Camden, Islington) who you supply or have supplied the system to, stating whether they are current or previous clients. | **PASS/FAIL** |
| **Supplier Response:**  *Pass = Has substantial previous experience in providing the system to other NHS organisations.*  *Fail = Little to no experience in providing the system to other NHS organisations.* | | |
| **Examples / Case Studies**  [Insert details]  **Referees**  [Insert details]  **List of NCL Clients**  [Insert details] | | |

1. **SOFTWARE REQUIREMENTS**

**3A. FUNCTIONALITY (40% weighting)**

The following table sets out the core functionality required of the system. Please review these requirements carefully and explain how your system meets these requirements, using the supplier response table below. Responses to each category will be scored out of 5 using the scoring methodology set out on page 2 of the RFQ document.

|  |  |  |
| --- | --- | --- |
| Category | No. | Requirement |
| Access and Permission  Controls | i. | Allows the creation of separate work areas / spaces which are only accessible by certain users/teams and by the nominated system ‘super-user’ (see iii. below); |
| ii. | Enables user permissions (Read/Edit/Delete) for each workspace and subfolder at a minimum; |
| iii. | Allows a nominated ‘super user’ to view all active workspaces and files and to control access and permissions for all work areas; |
| iv. | It should be easy to search for documents from across different workspaces, subject to access permissions |
| Document storage, version control, audit trail | i. | The system should function as a repository for user documents which can host word, excel, PowerPoint, Visio, MS Project, MS Publisher, and PDF formats; |
| ii. | It should be easy to upload, download, move, copy, replace and delete documents, subject to permissions; |
| iii. | It should retain and allow reversion to previous versions; |
| iv. | It should maintain a record of comments and revisions made to each version; |
| Document Collaboration | i. | It should enable authorised users to ‘check out’, and edit stored documents and synch changes back to the original; |
| ii. | It should enable users to collaborate effectively on documents through enabling individual and group comments and email notifications; |
| Document workflow | i. | The system should allow documents to go through a defined approval process, e.g. ‘draft’, ‘reviewed’, ‘approved’ etc. with specific users being notified via email when being asked for authorisation; |
| Document sharing | i. | The system should allow users to generate links to files which can be shared with other system users; |
| ii. | The system should allow a small group of authorised users within the PMO to circulate stored documents (e.g. meeting papers) to non-users of the system (e.g. via a publicly accessible link). |

**Supplier response**

|  |  |  |
| --- | --- | --- |
| Requirement | Response | Score |
| Access and Permission  Controls | [Insert details] | /5 |
| Document storage, version control, audit trail | [Insert details] | /5 |
| Document Collaboration | [Insert details] | /5 |
| Document workflow | [Insert details] | /5 |
| Document sharing | [Insert details] | /5 |

**3B. USER INTERFACE/EXPERIENCE (20% weighting)**

Given that there may be a large number of system users and that different users are likely to come on stream at various stages of delivery, it is vital that the system is user friendly and easily adoptable by new staff, with minimal training required.

Usability of the system will be assessed at the demo stage for shortlisted candidates.

**3C. SYSTEM FLEXIBILITY (20% weighting)**

Given that different work-streams will have different requirements which may change over time, the system will need to be flexible so that each team area / workspace can be reconfigured by authorised users without requiring constant support from the supplier. The main elements which should be configurable by authorised users are as follows:

Super-user

* Creation of new team areas / workspaces
* Changing of folder structure and creation of new folders
* Addition of new users and setting of their permissions
* Setting of workflow categories e.g. ‘draft’, ‘reviewed’, ‘approved’ etc.

Team area / workspace leads

* Changing of folder structure and creation of new folders
* Addition of new users within the team area only and setting of their permissions
* Setting of workflow categories for the team area e.g. ‘draft’, ‘reviewed’, ‘approved’ etc.

Flexibility of the system will be assessed at the demo stage for shortlisted candidates.

1. **OTHER INFORMATION**

Given the information provided, please include any additional information which you feel sets your system apart from that of your competitors. Please note that the response to this section is for information only and is not scored.

|  |
| --- |
| [Insert details] |

**Annex B**

**NHS Terms and Conditions for Supply of Goods and Provisions of Services**



**Annex C**

**Financial Submissions (20% weighting)**

***Financial Envelope - The financial envelope available for this work is within the range of £10,000 – £12,000 per annum (assuming 100 licences) excluding VAT.***

Please provide a full breakdown of costs for your system using the attached template. Prices should exclude VAT.

  
All costs must be inclusive of travel and related expenses to the Base location. An estimate of the overall costs for expenses must be submitted to enable comparison of bids on an equal basis. All prices exclude VAT.

If submitting your proposal as a pdf document, please submit your prices in a separate file.

As part of your response, please clarify how your licencing fees works, e.g. do you charge by band or by additional user.

**Scoring:**

**The lowest price (within affordability limits) will be awarded the maximum score for price with other bidders aggregated against that.**

**ANNEX D**

**Declaration of conflict** **of interests**

**(Bidders/Contractors)**

**Project Name: Cloud-based File Storage/Sharing and Document Collaboration Tool for the North Central London STP**

**NHS Camden Clinical Commissioning Group** **Bidders/potential contractors/service providers declaration form: financial and other interests**

This form is required to be completed in accordance with the CCG’s Constitution, and s140 of the NHS Act 2006 (as amended by the Health and Social Care Act 2012) and the NHS (Procurement, Patient Choice and Competition) (No2) Regulations 2013 and related guidance

**Notes:**

* All potential bidders/contractors/service providers, including sub-contractors, members of a consortium, advisers or other associated parties (Relevant Organisation) are required to identify any potential conflicts of interest that could arise if the Relevant Organisation were to take part in any procurement process and/or provide services under, or otherwise enter into any contract with, the CCG, or with NHS England in circumstances where the CCG is jointly commissioning the service with, or acting under a delegation from, NHS England. If any assistance is required in order to complete this form, then the Relevant Organisation should contact [*specify*].
* The completed form should be sent to [*specify*].
* Any changes to interests declared either during the procurement process or during the term of any contract subsequently entered into by the Relevant Organisation and the CCG must notified to the CCG by completing a new declaration form and submitting it to [*specify*].
* Relevant Organisations completing this declaration form must provide sufficient detail of each interest so that the CCG, NHS England and also a member of the public would be able to understand clearly the sort of financial or other interest the person concerned has and the circumstances in which a conflict of interest with the business or running of the CCG or NHS England (including the award of a contract) might arise.
* If in doubt as to whether a conflict of interests could arise, a declaration of the interest should be made.

Interests that must be declared (whether such interests are those of the Relevant Person themselves or of a family member, close friend or other acquaintance of the Relevant Person), include the following:

* the Relevant Organisation or any person employed or engaged by or otherwise connected with a Relevant Organisation (Relevant Person) has provided or is providing services or other work for the CCG or NHS England;
* a Relevant Organisation or Relevant Person is providing services or other work for any other potential bidder in respect of this project or procurement process;
* the Relevant Organisation or any Relevant Person has any other connection with the CCG or NHS England, whether personal or professional, which the public could perceive may impair or otherwise influence the CCG’s or any of its members’ or employees’ judgements, decisions or actions.

**Declarations:**

|  |  |
| --- | --- |
| **Name of Relevant Organisation:** |  |
| **Interests** | |
| **Type of Interest** | **Details** |
| Provision of services or other work for the CCG or NHS England |  |
| Provision of services or other work for any other potential bidder in respect of this project or procurement process |  |
| Any other connection with the CCG or NHS England, whether personal or professional, which the public could perceive may impair or otherwise influence the CCG’s or any of its members’ or employees’ judgements, decisions or actions |  |

|  |  |  |
| --- | --- | --- |
| **Name of Relevant**  **Person** | [*complete for all Relevant Persons*] | |
| **Interests** | | |
| **Type of Interest** | **Details** | **Personal interest or that of a family member, close friend or other acquaintance?** |
| Provision of services or other work for the CCG or NHS England |  |  |
| Provision of services or other work for any other potential bidder in respect of this project or procurement process |  |  |
| Any other connection with the CCG or NHS England, whether personal or professional, which the public could perceive may impair or otherwise influence the CCG’s or any of its members’ or employees’ judgements, decisions or actions |  |  |

**Form Completion**

|  |  |
| --- | --- |
| **I declare that to the best of my knowledge and belief, the above information is complete and correct. I undertake to update as necessary the information. I understand that the information will be used in the evaluation process to assess my organisation’s suitability to be included in the tender evaluation process, and that giving false information may result in my organisation being disqualified from the process, at this or whatever stage it becomes known to the Commissioners.** | |
| **Signed:** |  |
| **Name:** |  |
| **Position:** |  |
| **Bidder:** |  |
| **Date:** |  |