**INVITATION TO SUBMIT PROPOSALS FOR EXTERNAL SUPPORT TO CARRY OUT WORKFORCE PLANNING FOR THE PARTNERSHIP**

1. **INTRODUCTION**

The partnership between Barnet, Enfield and Haringey Mental Health NHS Trust (BEHMHT) and Camden and Islington NHS Foundation Trust (C&I) has been developing since April 2021, when the provider mental health review between our two trusts started. We were explicit from the outset that the review, and the developing partnership, needed to focus on making a demonstrable difference to service users, local residents, and our staff. We agreed four main objectives for the partnership, which are:

* Reducing health inequalities;
* Eliminating unwarranted variation and inconsistencies across the services;
* Improving outcomes for service users; and
* Creating a sustainable workforce model and a fairer place to work.

Since the agreement of these objectives, there have been several significant milestones, including:

* The appointment of a Joint Chief Executive from October 2021.
* The establishment of a single Partnership Executive Team from June 2022.
* The agreement and early implementation of nine priority workstreams that support the delivery of the partnership objectives.
* The establishment of a Partnership Development Committee (joint committee of both boards) to oversee the partnership, with further work around governance and expected establishment of further joint board committees.

A paper describing Partnership Strategic Themes and Priorities, that was approved at both boards in March, has been attached as an appendix to provide further detail about the partnership. Both trusts are successful and well-regarded organisations, rated ‘Good’ by the CQC. Together the trusts employ over 5,500 staff and have a combined turnover of over £500 million.

The partnership is currently seeking consultancy support to produce a robust, three-year workforce plan and accompanying research-based narrative to inform and support key assumptions in the three-year workforce plan.

The three-year workforce plan for the partnership should include:

* Baseline data of staff in post and staff usage by professional group and grade
* Detailed analysis and figures for the number of staff by profession and by grade that will be needed to meet the demand for services across the partnership over a three-year period
* Assumptions on skill mix, training requirements, external factors and turnover rates of different staff groups based on historical trends, present circumstances and future predictions, consideration of leavers for all reasons, including retirement etc. should be built into the workforce plan
* Identification of particular hotspots and risks to be identified in the plan, along with potential solutions and mitigations
* Workforce supply and demand modelling that will inform the partnership’s recruitment and retention plan, and minimise the need for agency staff

The research-based narrative should include information on:

* External and internal factors impacting on the mental health workforce, for both clinical and non-clinical staff
* Key challenges facing the partnership’s mental health workforce over the coming years and recommendations on how to overcome these challenges
* Opportunities to innovate and utilise the workforce in a different way to ensure sustainability of the partnership workforce
* Information on trends, workforce data and national workforce initiatives that will impact on planning and recruitment of the future mental health workforce.

The aim is to create a robust, detailed workforce plan for the next three years that includes data and figures of staff groups and a contextual and forward looking narrative to support the assumptions in the workforce plan. The narrative should outline key ambitions for workforce planning and how we can adapt and think differently about our future workforce to ensure we are able to continue to meet the evolving challenges in the delivery of mental health care to the populations we serve.

This work will support the ongoing recruitment and retention efforts of the partnership and will align with and enable the submission of the national workforce returns that are submitted to NHS England and Health Education England on an annual basis.

This document summarises the Trust’s requirements for external support and invites proposals.

1. **BACKGROUND**

The Trusts provide the full range of mental health services across the London boroughs of Barnet, Camden, Enfield and Haringey and Islington, and more specialist mental health services to a much larger population across North London, Hertfordshire, Essex and the South-east. BEHMHT currently provides physical community health in Enfield, but these services are expected to transfer to another provider in late 2022 2022. This will enable the partnership to focus on mental health.

In addition, BEHMHT is the lead provider, in a provider collaborative, that commissions the North London Forensic Consortium, bringing regional providers of NHS England specialised commissioned services together, in order to improve the quality of care for patients. We expect there to be further opportunities to extend commissioning responsibilities for general mental health services, delegated from the North Central London Integrated Care Board.

Further information about the services provided by the partnership is included in appendix 2, and is available on the Trusts’ websites at: [www.beh-mht.nhs.uk](http://www.beh-mht.nhs.uk) and [www.candi.nhs.uk](http://www.candi.nhs.uk)

1. **KEY DRIVERS OF THE WORKFORCE PLAN AND NARRATIVE**

The key issues that need to be considered in developing the partnerships three-year workforce plan and research-based narrative:

* National legislation, policy, and guidance, including those around workforce and the NHS Long Term Plan priorities for mental health which will require new ways of working and alternative workforce models.
* Increasing demand for mental health services - driven by growing populations locally, changing demographics, societal changes and the impact of the Covid-19 pandemic – and expectations to offer more integrated and holistic care alongside partners.
* Issues relating to workforce supply and demand and consideration of the internal and external factors impacting on supply and demand of the mental health workforce.
* Key challenges facing recruitment, retention and training of key mental health professions e.g. mental health nurses, psychiatrists, psychologists etc.
* The workforce, recruitment and retention challenges facing the partnership and both trusts individually.
* The need to reduce spend on agency staff.
* The partnership’s aim to be an anchor institution and to draw more of our staff from our local communities.
* The overall NCL ICB priorities for workforce. Further details can be found on the NCL ICB website [www.nclhealthandcare.org.uk](http://www.nclhealthandcare.org.uk)
* The national and local NHS financial position, with commitment to fund mental health through the Mental Health Investment Standard, but limited overall increased NHS resources, inflationary pressures, significant underlying revenue deficits across the NHS and locally in North Central London.

1. **REQUIREMENTS FOR SUPPORT**

The key requirements from the external support for this work are:

* An analysis of the external environment the Trusts are working in, locally and nationally, and advising on the potential impact and implications of these issues on the future mental health workforce.
* Bringing advice and insight from other health economies and other mental health providers nationally and internationally on the key issues and the impact on the mental health workforce. Also bringing advice and experience from elsewhere on the most effective process for developing a robust and detailed workforce plan and ideas for innovative workforce models.
* Analysing and researching workforce supply and demand. This includes:
  + Internal supply and demand analysis- where the partnership have successfully recruited to key professions and where there are gaps.
  + External supply and demand analysis- professions where there are national shortages and professions projected to grow due to investment or other national recruitment or training initiatives.
* Analysis to inform planning assumptions, projections for turnover, retirement and other factors impacting on overall workforce numbers to be factored into the workforce plan.
* Ensuring the workforce plan informs and is aligned with the NHS England requirements for annual workforce planning.
* Ensure the workforce plan highlights the skill mix and training requirements that will sit alongside of the recruitment projections within the workforce plan.
* Supporting key colleagues and executives to input into and engage with and help shape the effective final production of the workforce plan by early 2023.
* Ensure the workforce plan aligns with the vision and ambitions of the partnership.

1. **GOVERNANCE**

The appointed consultancy will work closely with the HR, OD, informatics and other key departments to develop this piece of work. This piece of work will be overseen by the Interim Chief People Officer.

1. **SUBMISSION OF QUOTES AND SUPPORTING NARRATIVE**

The final submission deadline is Tuesday, 29th November 2022 at 23:59 All bids should be submitted via the portal.

The likely interview date for shortlisted suppliers is week commencing 5th December.

Presentation format:

Suppliers will be asked to present to BEHMHT and C&I Partnership as below:

1. Presentation – 20 minutes
   1. Relevant previous experience
   2. The skills and expertise you will bring to this piece of work, what sets you apart?
   3. Your approach to developing the workforce plan, including key assumptions and the research-based narrative
   4. How you will engage with key colleagues to incorporate their expertise and how you will use the research in the narrative to inform the workforce plan
   5. How you plan to manage challenges and risks that arise
2. Q&A Session – 20 minutes
   1. Further clarification on presentation.
   2. Further clarification on tender responses.

Any requests for further information or clarification should be made via the procurement portal.

1. **CONTRACT PERIOD**

The contract will begin in approximately December 2022 with the aim of the three-year workforce plan and research-based narrative being completed by the end of January or early February 2023.

The contract will be covered by the Standard Purchase Order NHS Terms and Conditions.

1. **Evaluation Criteria**

The Partnership will evaluate proposals to identify the most economically advantageous proposal. The Partnership has a fixed budget of up to £50,000 (inclusive of VAT) for this assignment and is seeking fixed price proposals. Proposals will therefore be assessed against the evaluation criteria summarised below.

Bidders should note that any assumptions made in their proposal within the fixed price should be explicit in the proposal. The Trusts will not accept an increase in fees at a later stage because the bidder’s initial assumptions proved inaccurate unless they were clearly identified in the original proposal together with the potential cost implications.

A score of 0, 1, 2 or 3 (as the case may be) for your response to a question will entitle you to receive a mark as a proportion of the ‘maximum marks available’ (as set out in Table 3 (Evaluation Model)) in the following proportions (“Mark”):

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| **Score** | **Scoring Methodology** |
| 3 | Detailed response providing a comprehensive and complete description of the requirement, which is supported by evidence (where relevant) and which presents no or very minimal concerns in relation to deliverability and/or performance and/or transfer of risk to the Trust. |
| 2 | Clear response providing visibility of compliance with the requirement, but there are minor deficiencies in the evidence provided (where relevant) and/or minor concerns in relation to deliverability and/or performance and/or transfer of risk to the Trust. |
| 1 | Basic response with limited information about the requirement and/or there are major deficiencies in the evidence provided (where relevant) and major concerns in relation to deliverability and/or performance and/or transfer of risk to the Trust. |
| 0 | Unanswered, or the response does not address the requirement. |

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| Relevant previous experience | 10% |
| Approach to developing the three-year workforce plan | 25% |
| Approach to developing the research-based narrative to support the workforce plan | 25% |
| Delivery Plan | 20% |
| Value for money | 10% |
| Interview | 10% |
| **TOTAL** | 100% |

1. **Questionnaire**

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| **SECTION A - INFORMATION ONLY QUESTIONS** |

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| **A1** | **Please state whether your organisation is the ultimate parent company within its group or whether it is a subsidiary or is otherwise controlled by another entity. If your organisation is a subsidiary or is controlled by another entity, what is its relationship with its ultimate parent company (and any holding companies) or the controlling body (i.e. in terms of ownership, directorship, authority and control)?** |
| **Bidder Response:** |  |

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| **A2** | **Please provide a one-page chart illustrating your organisation's ownership structure including its relationship to any parent or other group or holding companies.** |
|  | Submit as a separate attachment, as diagrams will not be visible in web page filtered format. |

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| **A3** | **Consortia and Sub-Contracting** | | |
|  | **Please indicate by stating Yes or No in the blue boxes, whether:** | | **Yes / No** |
| **Bidder Response:** | **(a) Your organisation is bidding to provide all the services required itself, without the use of any sub-contractors or consortium members** | |  |
| **(b) Your organisation is bidding in the role of prime contractor and intends to use third parties to provide some services** | |  |
| **(c) You are bidding as part of a consortium** | |  |
| **If your answer is “Yes” in (b) or (c) please provide a separate Appendix showing the composition of the supply chain, listing the following:**   * **company/organisation name(s);** * **indication of which member of the supply chain (which may include the bidder solely or together with other providers) will be responsible for which elements of the requirement;** * **Confirmation of their commitment to provide the relevant services.** | | |
| **A4** | **If you have stated in question A3 that you are bidding as a consortium, e.g. as a corporate or a contractual joint venture please provide details of the structure of the consortium and the percentage shareholdings of each member or (in the case of contractual joint ventures) the contribution of each member to the consortium.** | | |
| **Bidder Response:** | **Details of the proposed structure (e.g. corporate joint venture – new limited liability company established by the consortium, with x and y as guarantors).** |  | |
| **Consortium Members** | **Percentage Shareholding / Contribution** | |
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| **A5** | **If you have stated in question A3 that you are bidding as a consortium, please provide the names of any members of the consortium who are also submitting a separate ITT Response (either in their own name or as part of another consortium or subcontractor to another party) as part of this procurement exercise. Please state N/A if this question does not apply.** |
| **Bidder Response:** |  |

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| **A6** | **How many staff does your organisation (including consortia members or named sub-contractors where appropriate) employ relevant to the carrying out of services similar to those required under this contract?** |
| **Bidder Response:** |  |

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| **SECTION B – GROUNDS FOR REJECTION** | | |
| **[B1]** | **Grounds for mandatory rejection (ineligibility)** | |
| **Bidder Response:** | **Has your organisation or any directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences?** | **Yes/No** |
| 1. conspiracy within the meaning of section 1 of the Criminal Law Act 1977 where that conspiracy relates to participation in a criminal organisation as defined in Article 2(1) of Council Joint Action 98/733/JHA (as amended); |  |
| 1. corruption within the meaning of section 1 of the Public Bodies Corrupt Practices Act 1889 or section 1 of the Prevention of Corruption Act 1906 (as amended); |  |
| 1. the offence of bribery; |  |
| (ca) bribery within the meaning of section 1 or 6 of the Bribery Act 2010; |  |
| 1. fraud, where the offence relates to fraud affecting the financial interests of the European Communities as defined by Article 1 of the Convention relating to the protection of the financial interests of the European Union, within the meaning of: | |
| * 1. the offence of cheating the Revenue; |  |
| * 1. the offence of conspiracy to defraud; |  |
| * 1. fraud or theft within the meaning of the Theft Act 1968 and the Theft Act 1978; |  |
| * 1. fraudulent trading within the meaning of section 458 of the Companies Act 1985 or section 993 of the Companies Act 2006; |  |
| * 1. defrauding the Customs within the meaning of the Customs and Excise Management Act 1979 and the Value Added Tax Act 1994; |  |
| * 1. an offence in connection with taxation in the European Community within the meaning of section 71 of the Criminal Justice Act 1993; or |  |
| * 1. destroying, defacing or concealing of documents or procuring the extension of a valuable security within the meaning of section 20 of the Theft Act 1968; |  |
| 1. money laundering within the meaning of the Money Laundering Regulations 2003 or Money Laundering Regulations 2007; or |  |
| 1. any other offence within the meaning of Article 45(1) of Directive 2004/18/EC as defined by the national law of any relevant State. |  |

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| **[B2]** | **Discretionary grounds for rejection** | |
| **Bidder Response:** | **Is any of the following true of your organisation?**  **If you answer ‘yes’ to** any of these questions please set out (in a separate Appendix in Microsoft Word format) the full facts of the relevant incident and any remedial action taken subsequently. | **Yes/No** |
| (a) being an individual, is bankrupt or has had a receiving order or administration order or bankruptcy restrictions order made against him or has made any composition or arrangement with or for the benefit of his creditors or has made any conveyance or assignment for the benefit of his creditors or appears unable to pay or to have no reasonable prospect of being able to pay, a debt within the meaning of section 268 of the Insolvency Act 1986, or article 242 of the Insolvency (Northern Ireland) Order 1989, or in Scotland has granted a trust deed for creditors or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of his estate, or is the subject of any similar procedure under the law of any other state; |  |
| (b) being a partnership constituted under Scots law, has granted a trust deed or become otherwise apparently insolvent, or is the subject of a petition presented for sequestration of its estate; or |  |
| (c) being a company or any other entity within the meaning of section 255 of the Enterprise Act 2002 has passed a resolution or is the subject of an order by the court for the company’s winding up otherwise than for the purpose of bona fide reconstruction or amalgamation, or has had a receiver, manager or administrator on behalf of a creditor appointed in respect of the company’s business or any part thereof or is the subject of similar procedures under the law of any other state? |  |
| **Has your organisation:** | |
| (a) been convicted of a criminal offence relating to the conduct of your business or profession; |  |
| (b) committed an act of grave misconduct in the course of your business or profession; |  |
| (c) failed to fulfil obligations relating to the payment of social security contributions under the law of any part of the United Kingdom or of the relevant State in which you are established; |  |
| (d) failed to fulfil obligations relating to the payment of taxes under the law of any part of the United Kingdom or of the relevant State in which you are established; or |  |
| e) been guilty of serious misrepresentation in providing any information required of you under Regulation 23 of the Public Contracts Regulations 2006? |  |

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| **[B3]** | **INSURANCE** | |
|  | **Insurance – A 'Yes' Response to this question is mandatory.** | |
| **Bidder Response:** | **Please confirm that you have, or will obtain in the event of being successfully appointed to the Contract, the following minimum levels of insurance.** | **Yes / No** |
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| Employers liability | £5 million |
| Public Liability | £1 million |
| Professional Indemnity | £1 million |
| Product Liability | £1 million |

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| **[B4]** | **QUALITY ASSURANCE AND CERTIFICATION** | |
|  |  | **Yes / No** |
| [B4.1] | Does your organisation have a Quality Management System (QMS) based on the principles of ISO 9001 or the European Foundation for Quality Management (EFQM) Excellence Model or equivalent? |  |
| [B4.2] | Does your organisation have a valid and in-date Quality Assurance Certification or Report in the form of:  an ISO 9001 Quality Assurance Certificate - registered by a UKAS accredited organisation (see <http://www.ukas.com/about-accreditation/accredited-bodies/certification-body-schedules-QMS.asp>) or a UKAS equivalent national body for non-UK bidders; or  a current EFQM ‘Committed to Excellence’ Assessor’s Report;  or equivalent?  The Certificate/Report must be relevant to the Services required and cover the location which will supply the Services. |  |
| If “Yes”, please provide copies of any relevant Certificates/Reports as separate attachments. | |
| [B4.3] | If you have answered “Yes” to question B4.1 but “No” to question B4.2 please provide brief details of the QMS used and include copies of your ISO 9001 compliant Quality Policy, Quality Manual Index and ISO 9001 Compulsory Documents (listed beneath the Marking Scheme); or your EFQM ‘Committed to Excellence’ Self Assessment Questionnaire (or equivalent). If your answer to B4.1 or B4.2 (or both) is “Yes” in respect of an equivalent, please state the equivalent(s) below, with a brief explanation of its/their relevance. | |
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| **C** | **SPECIFIC TECHNICAL & SERVICE REQUIREMENTS - DETAILED QUESTIONNAIRE**  ITT Response Questions (Technical/Quality) **– 10%** |
| **[C1]** | **QUESTION 1- Relevant Experience** |
|  | Please provide:   * A summary of your experience in supporting NHS organisations to develop detailed workforce plans that include data and figures and accompanying research to support the plan. Please also include why you believe you are best placed to deliver the Trust’s requirements. * Details of the team who would carry out the work, clearly setting out roles and responsibilities of each team member and their relevant experience. The proposal should make clear the team member(s) who will be carrying out the majority of the day-to-day work, including the generation of the figures in the three-year plan and the supporting research-based narrative. Please include CVs of the project team who will be supporting this piece of work. |
|  | **Minimum pass mark: 1** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (500 words maximum) |

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| **C** | **SPECIFIC TECHNICAL & SERVICE REQUIREMENTS - DETAILED QUESTIONNAIRE**  ITT Response Questions (Technical/Quality) **– 50%** |
| **[C2]** | **Proposed approach to workforce plan and supporting narrative** |
|  | Please provide an outline of your approach to producing the partnerships three-year workforce plan and accompanying research-based narrative within the timescale required.  The outline must include:   * A breakdown of the approach you will take to completing the three-year workforce plan. This should include information on your approach to manage and analyse the data and figures that will go into the final version of the workforce plan. * A summary of how you will determine the key assumptions that will inform the workforce plan and how you will ensure the information in the research-based narrative also informs the final version of the workforce plan. * A summary of the key risks and issues that you feel will need to be addressed in developing the three-year workforce plan and accompanying research and how you will work with the Trusts to manage these. |
|  | **Minimum pass mark: 1** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (1,000 words maximum): |

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| **C** | **SPECIFIC TECHNICAL & SERVICE REQUIREMENTS - DETAILED QUESTIONNAIRE**  ITT Response Questions (Technical/Quality) **– 20%** |
| **[C3]** | **QUESTION 3- Delivery Plan** |
|  | Please provide a delivery plan that includes:   * A proposed work programme with timelines, which includes the development of the three-year workforce plan and the research-based narrative of the external, internal factors impacting on the mental health workforce. * A plan for how you will engage with key colleagues to provide input and expertise into the final production of the three-year workforce plan. |
|  | **Minimum pass mark: 1** If you score less than 1 for this question, your response will be rejected and you will not be invited to participate further in the procurement. |
|  | **SUPPLIER RESPONSE** (700 words maximum): |

**November 2022**