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**Invitation to Quote**

**Instructions & Requirements Document**

**NHS England and NHS Improvement Commercial**

Digital Playbooks

**Document owner:** Commercial & Procurement Team, NHS England and NHS Improvement

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**Document History**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date | Status | Key Change Made | Author/s |
| 1.0 | 01/11/18 | Final Version |  | Charlie Stephens/Andrew Campan/Shared Business Services  |
| 2.0 | 15/07/19 | Final Version | Additional details relating to the Hive and where further information and guidance is available | Polly Feeney |
| 3.0 | 02/10/19 | Final Version | Updates made following initial user feedback. | Andrew Campan |
| 4.0 | 25/03/21 | Final Version | Updated to reflect new internal sub £150k process | Makaella Allison |

# Introduction

###### This Invitation to Quote (ItQ) has been prepared by NHS England and NHS Improvement (the ‘Authority’). The Authority is looking for a Supplier for the provision of services to deliver the [digital playbooks](https://www.nhsx.nhs.uk/key-tools-and-info/digital-playbooks/), which sits on the NHSX website with the aim to use case studies to show how different technology is being used across the UK to support clinicians and improve care. The proposed engagement is envisaged to run from October 2021 to March 2022. A full description of the requirement is found in section 2.

###### This procurement exercise is being carried out as an Invitation to Quote.

###### The Authority has taken reasonable care to ensure that the information provided is accurate in all material respects. However, the Bidders attention is drawn to the fact that no representation, warranty or undertaking is given by The Authority in respect of the information provided in respect of this transaction and/or any related transaction.

###### The Authority does not accept any responsibility for the accuracy or completeness of the information provided and shall not be liable for any loss or damage arising directly or indirectly as a result of reliance on this ItQ or any subsequent communication.

###### No warranties or opinions as to the accuracy of any information provided in this ItQ Pack shall be given at any stage by The Authority.

###### Any person considering making a decision to enter into contractual relationships with The Authority or any other person on the basis of the information provided should make their own investigations and form their own opinion of The Authority. The attention of Bidders is drawn to the fact that, by issuing this ItQ, The Authority is in no way committed to awarding any contract and that all costs incurred by Bidder in relation to any stage of the Tender process are for the account of the relevant Bidder only.

###### In accordance with The Authority’s internal financial instructions and general principles applicable to public procurement, The Authority seeks best value for money in terms of the Contract reached with the successful Bidder.

###### The Authority has endeavored, therefore, to express as clearly as possible in this ItQ the terms on which it would propose to contract with the successful Bidder and in particular the obligations, risks and liabilities which it expects to become the responsibility of the successful Bidder.

This document contains the following sections:

* **1. Instructions**
	+ Project Team Details
	+ Timeline
	+ Supplier Clarification Question process
	+ Evaluation Criteria
	+ Scoring
* **2. The Requirement:**
	+ Background Information
	+ Standards and Service Specification
	+ Essential Skills Deliverables
	+ Deliverables
	+ Proposed Terms and Conditions
* **3. Responding to the ItQ**
	+ Bidders Details
	+ Further Bidder Information
	+ Bidders Response
1. **Instructions**

**Project Team Details and Contract Lead**

|  |  |
| --- | --- |
| Name of Team | Digital Innovation Team |
| Name and Title of Contract Lead | Veronica Chan, Senior Delivery Manager |

**Timeline**

|  |  |
| --- | --- |
| **Item** | **Date** |
| ItQ Release Date & Issue on Contract Finder\* | W/C 20 September 2021 |
| ItQ Clarification Deadline | 4pm 29 September 2021 |
| ItQ Closing Date | 4pm 4 October 2021 |
| Estimated Award Date | W/C 11 October 2021 |
| Estimated Contract Commencement Date | W/C 11 October 2021 |

The timeline is indicative and may be subject to change.

**Supplier Clarification Question Process**

All clarification questions relating to this ItQ must be submitted via the procurement portal route (Atamis) before 4pm 29 September 2021. Clarification questions received after this time will not be responded to. All Clarification questions will be responded to within 2 working days of the date received.

All clarification questions received via other routes will not be reviewed and responded to.

**Please Note: -** To ensure an open and fair process is followed, all bidders will receive a copy of the question(s) and answer(s).

**Evaluation Criteria**

The purpose of evaluation in the procurement process is to establish which supplier(s) have submitted the best quotation; ensuring that the assessment of quotes is undertaken in a transparent, fair and consistent manner so that an effective comparison can be made.

The Authority, reserves the right to accept or reject all or any part of the quotation if you have failed to provide the information requested in this quotation or you have submitted any modification or any qualification to the terms and conditions of contract.

The Authority does not bind itself to accept the lowest priced, or any quotation, nor guarantee any value or volume and shall not be liable to accept any costs you have incurred in the production of your quotation.

The Authority will check each quotation and submission for completeness and compliance with the requirements in this Invitation to Quote document, thus, you should ensure that you carefully examine this document in full.

Quotes will be evaluated on the following Quality and Costs basis.

|  |  |
| --- | --- |
| **Section** | **Weighting (%)** |
| Technical/QualityIncluding Sustainability and Social Value | 70 |
| Commercial | 30 |

A weighted scoring system will be applied to the response, the high-level evaluation criteria are given below:

|  |  |
| --- | --- |
| **Question** | **Weighting (%)** |
| 1. Please provide examples which demonstrate your experience and expertise in this area, and the outcomes achieved. Please also explain how you will ensure transfer of relevant project knowledge on exit to help build ‘Institutional knowledge’ and ongoing user support. (Max-500 words)
 | Technical/Quality10% |
| 1. Please detail how you meet the requirements outlined in section 2, and what and how you plan to deliver this project (including an indicative timetable of proposed activities, outputs, quality assurance and problem resolution etc.) (Max-500 words)
 | Technical/Quality35% |
| 1. Please detail how you would work collaboratively with the relevant stakeholders involved in the project and your approaches for a user focused mind-set, to consider the impact of the work on the user’s experience and continuous improvement process over time to ensure the product is fit for purpose. (Max-500 words)
 | Technical/Quality10% |
| 1. If you were successful please provide detail on the roles, responsibilities and experience of the team of people involved in the planning and delivery of this project (Max-500 words)
 | Technical/Quality5% |
| 1. Please explain how your delivery model will deliver social value and align with NHS commitment to sustainability

*(N.B. Social value describes the social benefits achieved from public services and considers more than just the financial transaction. It includes wellbeing, health, inclusion and employment.)* (Max-500 words) | Social Value10% |

**Scoring**

**Bidder information**

The ‘Bidders Detail’ will be ‘For Information Only’ and not scored.

The ‘Further Bidder Information’, will be given either a ‘Pass/Fail’ for each section.

**Quality**

The Authorities evaluation system is based on the familiar “weighted scoring approach”, in which the officer scores responses to the quality questions according to a pre-agreed scoring system 0-4 (see table below). The scores for the sections are then added together to give a total quality score for the quotation response.

|  |  |
| --- | --- |
| **Score** | **Interpretation** |
| 4Excellent | The Tenderer’s response provides full confidence that the Tenderer understands and can deliver the Requirements well and addresses all of the requirements set out in the question.   |
| 3Good | The Tenderer’s response provides a good level of confidence that the Tenderer understands and can deliver the services and the Tenderer's response addresses all or most of the requirements set out in the question.  |
| 2Satisfactory | The Tenderer’s response provides a satisfactory level of confidence that the Tenderer understands and can deliver the services and the Tenderer's response addresses at least some of the requirements set out in the question. However, the response is lacking in some areas. |
| 1Poor | There are weaknesses (or inconsistency) in the Tenderer’s understanding of the services and/or Tenderer's response fails to address some or all of the requirements set out in the question. |
| 0Unacceptable | No response and/or information provided is deemed inadequate to merit a score. |

**Scoring Cost**

The financial weighted score is calculated by using the following formula:

Tenderers Price Weighted Score = Lowest Total Cost offered Tenderer Total Cost

 x (30% weighting)

(Lowest Total Cost divided by Tender Total Cost multiplied by 30)

The financial score will be calculated to two decimals places.

Therefore, the bidder who submits the lowest compliant bid (based on the pricing model created for evaluation purposes) will receive the full 30% available.

# The Requirement

The Requirement is detailed below which provides background to the project/business need, the standards or specification required alongside the essential supplier skills and the objectives of the requirement.

**2.1 Background Information:**

|  |
| --- |
| Digital Playbooks are a flagship NHSX product. They are a direct response to an ask from the system to support digital innovation and also support the COVID-19 restoration of services. Following the successful launch of the first eight playbooks in December 2020 and July 2021, NHSX are committed to delivering another suite in year, therefore it is vital we work with a supplier that can get up to speed quickly and deliver the final products.NHSX is developing digital playbooks to help clinical teams reimagine and redesign care pathways of the future by building digital technology into the modern patient journey. The aim is to help increase efficiency, choice and access such as supporting patients at home rather than in hospital, a demand magnified and accelerated by the impact of COVID-19. These playbooks are in response to feedback from clinicians that they wanted a resource outlining what digital tools were available to help to digitise the care they provide. The Playbooks show clinical staff what options are available and how they are being used in Trusts across the country, using detailed case studies to show how these tools could be adopted. The playbooks link to the guidance from NHS England and NHS Improvement, Royal Colleges and Associations to pull together digital tools and guidance on pathway development. Following the first 8 playbooks as a template product, the NHSX team is going to:* Update the existing digital playbooks (wave 1: cardiology, respiratory, MSK, dermatology and eye care; wave 2: cancer, gastroenterology and mental health) with updated contents and new case studies (approximately 20 case studies in total for the 5 playbooks from wave 1); ensure only DTAC compliant case studies are published in the playbooks
* Develop the next four playbooks (wave 3), co-authored by clinical experts for the following specialties: ENT, Perioperative surgery, Renal, Rheumatology. It is expected each playbook will consist of ~15-20 case studies each.
* Ongoing, biannual update of the published digital playbooks (revision of existing case studies and addition of new case studies)
 |

**2.2 Standards and Service Specification:**

|  |
| --- |
| In order to meet the project objectives and requirements outlined above, the following practices, outputs and deliverables are required:**Digital playbooks*** Working from existing NHSX content in google doc, the supplier will work with the NHSX team adopting a GDS aligned strategic approach to update the published digital playbooks, and build new playbooks in wagtail, following the design, delivery and onboarding of the existing NHSX digital playbook: <https://www.nhsx.nhs.uk/key-tools-and-info/digital-playbooks/>
* Ensure technical expertise in place to deliver operational intelligence. Work as part of a multi-disciplinary, self-organising team/individual, using Agile principles and methodologies. Full participation in the Agile processes of the team in which they are placed including attendance at team stand-ups, planning sessions to update on progress and raise any queries or concerns.
* Keep a user focused mind-set and consider the impact of their work on the user’s experience and the wider programme.
* Ensure transfer of relevant project knowledge on exit to help build ‘Institutional knowledge’. Provide ongoing monitoring of the product, regular health checks and problem resolution as required.
* Adhere to NHS Digital house style.
 |

**2.3 Essential Skills Deliverables:**

|  |
| --- |
| * Good theoretical and demonstrable working knowledge and experience of developing digital playbooks in the health and social care sector with a robust framework
* Experience of working collaboratively and inclusively with patients, clinicians, health care services and other relevant stakeholders to co-design and deliver a product that fits for purpose
* Operational support model for ongoing product development, quality assurance, user support, regular health checks and problem resolution as required.
* Strong experience of managing complex projects from inception to completion
* Good understanding of the dynamics, politics and complexities of Health and Social Care System and the health inequalities / digital inclusion agendas
 |

**2.4 Deliverables**:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Indicative timescales for this project are as follows:**

|  |  |
| --- | --- |
| Activity | Date |
| 1. Invitation to Quote (ITQ)  | Sept 2021 |
| 2. Review ITT applications | Oct 2021 |
| 3. Supplier appointed | Oct 2021 |
| 4. Update wave 1 and wave 2 digital playbooks (8 playbooks altogether) | Oct 2021 |
| 5. Develop wave 3 digital playbooks (peri-op; rheumatology; renal and ENT) | Nov to Dec 2021 |
| 6. Update of published digital playbooks | Feb to March 2022 |

Output details to be agreed with the successful bidder. |

**Proposed Terms and Conditions**

The proposed terms and conditions for this engagement are the NHS Standard Terms and Conditions of services: Purchase Order Version.

No amendments shall be considered or accepted in relation to the Terms and Conditions. Failure to accept the terms will result in disqualification.

There are available to view via [this link.](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/681016/NHS_TERMS_AND_CONDITIONS_FOR_THE_PROVISION_OF_SERVICES__PO_VERSION_.docx)

The Purchase Order will serve as the contract.

1. **Responding to ItQ**

###### When responding to this ItQ, Bidders must ensure that their Tender covers all the information required. Bidders must complete their Tenders within the Authorities procurement portal (Atamis) set out in the "Supplier Response Form". Failure to do so may render the response non-compliant and it may be rejected.

### In evaluating Tenders, the Authority will only consider information provided in the Supplier Response Form.

### Bidders should not assume that the Authority has any prior knowledge of the Bidder, its practice or reputation, or its involvement in existing services, projects, or procurements.

### If there are any questions that do not apply to a Bidder, please answer with a N/A and explanation where appropriate.

### Where any section of the ItQ indicates a word limit, any response will be reviewed to that word limit and any additional information beyond that word limit will not be considered. Bidders must provide a word count for each question response.

###### The Authority may at its own absolute discretion extend the Deadline for receipt of Tenders specified in the timetable. Any extension to the Deadline granted under this paragraph will apply to all Bidders.

###### Tenders must be submitted via the Authorities procurement portal (Atamis) no later than the ItQ submission Deadline specified in ‘Timetable’. Tenders may be submitted at any time before the Deadline.

###### Tenders received before this Deadline will be retained unopened until the opening date.

###### The Tender and any documents accompanying it must be formatted in Word or Excel as appropriate and be in the English language.

###### Price and any financial data provided must be submitted in or converted into pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided. Tender pricing must be provided excluding Value Added Tax (VAT).

**Bidders Details:**

The following is an outline of what will be required and found on Atamis. Please complete this on the Atamis portal directly.

*Please ensure a response is provided for all the sections below.*

|  |  |
| --- | --- |
| *Company Name* |  |
| *Company Address* |  |
| *Company’s representative name and title* |  |
| *Contact telephone number* |  |
| *Email address* |  |
| *Address for correspondence* |  |
| *Date of Submission* |  |
| *Company Registration Number* |  |
| *VAT Registration Number* |  |

# Further Bidder Information:

*Please ensure a response is provided for all the questions below.*

|  |  |  |
| --- | --- | --- |
| ***1.*** | *Has your organisation met all its obligations to pay its creditors and staff during the past year?* |  |
| ***2.*** | *If your answer to the above is No, have you rectified the situation resulting in your organisation now being able to pay its creditors and staff?* |  |
| ***3.*** | *Is your company or any group company (your Organisation) or are any of the directors/partners/proprietors in a state of bankruptcy, insolvency, compulsory winding up, and receivership, composition with creditors or subject to relevant proceedings?* |  |
| *4.* | *Please confirm that data is stored in line with the General Data Protection Regulations 2018 where applicable* |  |
| *5a.* | *Please confirm that you accept NHS England’s Purchase Order Terms and Conditions in full with no modifications. This offer and any contract arising from it shall be subject to these Terms and Conditions and all other items or instructions as issued in this bidder response.* [*https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\_data/file/681016/NHS\_TERMS\_AND\_CONDITIONS\_FOR\_THE\_PROVISION\_OF\_SERVICES\_\_PO\_VERSION\_.docx*](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/681016/NHS_TERMS_AND_CONDITIONS_FOR_THE_PROVISION_OF_SERVICES__PO_VERSION_.docx) |  |
| *5b.*  | *Please confirm that you accept that any modifications to the Terms and Conditions will be rejected and may result in the bid being rejected.*  |  |
| *6*. | *Please confirm that all invoicing shall be processed through Tradeshift in line with NHS England and Improvements processes.* |  |

**Bidder’s Response**

Please ensure a response is provided for both the Quality (A) and Commercial (B) sections on Atamis by downloading the attachments and reuploading once completed.

1. **Quality**

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 1** |  | **Question % Weighting** | 10% |
|  |  |
| Please provide examples which demonstrate your experience and expertise in this area, and the outcomes achieved. Please also explain how you will ensure transfer of relevant project knowledge on exit to help build ‘Institutional knowledge’ and ongoing user support. |
| **Supplier Response** |
| The maximum total word count for this section is 500. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 2** |  | **Question % Weighting** | 35% |
|  |  |
| Please detail how you meet the requirements outlined in section 2, and what and how you plan to deliver this project (including an indicative timetable of proposed activities, outputs, quality assurance and problem resolution etc.) |
| **Supplier Response** |
| The maximum total word count for this section is 500. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 3** |  | **Question % Weighting** | 10% |
|  |  |
| Please detail how you would work collaboratively with the relevant stakeholders involved in the project and your approaches for a user focused mind-set, to consider the impact of the work on the user’s experience and continuous improvement process over time to ensure the product is fit for purpose. |
| **Supplier Response** |
| The maximum total word count for this section is 500. |
| **Question 4** |  | **Question % Weighting** | 5% |
|  |  |
| If you were successful please provide detail on the roles, responsibilities and experience of the team of people involved in the planning and delivery of this project |
| **Supplier Response** |
| The maximum total word count for this section is 500. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question 5** |  | **Question % Weighting** | 10% |
|  |  |
| Please explain how your delivery model will deliver social value and align with NHS commitment to sustainability (N.B. Social value describes the social benefits achieved from public services and considers more than just the financial transaction. It includes wellbeing, health, inclusion and employment.) |
| **Supplier Response** |
| The maximum total word count for this section is 500. |

**B) Commercial**

|  |  |
| --- | --- |
| **Commercial** |  |
|  |  |
| Please provide a cost breakdown to undertake the work in the ‘Supplier Response’ box below. Your breakdown should also include the total cost exclusive of VAT to the Authority. Please complete a cost breakdown and total price for completion of all deliverables in MS Excel format. |
| **Supplier Response** |
|  |

**C) Confirmation**

|  |  |
| --- | --- |
| **Confirmation** |  |
|  |  |
| Please provide an electronic signature with name and contact details as confirmation the detail submitted is correct and agree to the *NHS England’s Purchase Order Terms and Conditions in full as outlined in ‘Point 5 Further Bidder Information’*: |
| **Supplier Response** |
| *Electronic Signature Insert …………..**Name:**Job Title:**Date:* |