

Invitation to Tender and Instructions to Tenderers

Employee Assistance Programme

PRJ_1875

NHS DIGITAL

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INVITATION TO TENDER AND INSTRUCTIONS TO TENDERERS

EMPLOYEE ASSISTANCE PROGRAMME



Digital

Introduction

This procurement is a further competition under Lot 3 (Employee Assistance Programmes) of the Crown Commercial Service Occupational Health Services, Employee Assistance Programmes and Eye Care Services Framework (RM3795).

This invitation to tender (ITT) provides potential suppliers with the information necessary to produce and submit a tender which may be evaluated and subsequently used to form a contract. It is designed to ensure that all tenders are given equal and fair consideration. Therefore, it is important that you provide all the information requested in the format specified.

This ITT:

- asks potential suppliers to submit their tenders in accordance with the instructions set out in the remainder of this ITT;
- sets out the overall timetable and process for the procurement;
- provides sufficient information to enable a compliant tender (including providing templates where relevant) to be submitted;
- sets out the evaluation criteria that will be used to evaluate tenders

You should note that this ITT has been prepared in good faith but does not purport to be a comprehensive statement of all matters relevant to the requirement. NHS Digital and its advisers do not accept any liability or responsibility for its adequacy, accuracy or completeness, nor do they make any representation or warranty, expressed or implied, with respect to the information it contains.

You are responsible for ensuring that no conflicts of interest exist between yourself and your advisers, and NHS Digital and its advisers. In particular you acknowledge that from time to time our solicitors act for NHS Digital, and by your continued participation in the procurement you waive any conflict rights you may have against our solicitors in relation to their representation of NHS Digital.

The extent of the services is as described in the statement of requirements. The successful potential provider in this procurement will then provide the services to NHS Digital.

The Call-Off Agreement will be for the appointed Supplier to provide an employee assistance programme to NHS Digital for the period set out in the Call-Off Agreement, the terms and conditions of which shall apply at all times.

The extent of the required service is as set out in the specification.

NHS Digital is managing this further competition in accordance with the Public Contracts Regulations 2015.

NHS Digital cannot guarantee volumes of business.

This ITT contains information and instructions for potential suppliers to submit a tender response if they wish to do so. It is not mandatory to submit a response to this invitation to tender.

Please read this document carefully as non-compliance may result in exclusion of your tender from this procurement.

NHS Digital is using an e-sourcing suite (Bravo) to manage this procurement and to communicate with all participants. No hard copy documents will be issued and all communications with NHS Digital (including the submission of tenders) will be conducted via Bravo.

Tender responses to the evaluation questions have been designed to be completed on-line in Bravo.

You will not be entitled to claim from NHS Digital any costs or expenses incurred during the tender process whether or not your tender is successful. Such costs to include costs incurred in the preparation and submission of your tender and any additional costs that you may incur if NHS Digital modifies or amends the tender requirements.

You may formally request a debriefing from NHS Digital if you are not successful in the procurement.

Procurement Timetable

The timetable below may be changed by NHS Digital at any time.

ACTIVITY	DATE & TIME
Clarification question deadline	29 November 2018 (9am)
Answer clarification questions	3 December 2018
Tender response deadline	10 December 2018 (9am)
Evaluation/Moderation	10 - 14 December 2018
Notification of intention to award	17 December 2018
Stand-still period starts	18 December 2018
Stand-still period ends	2 January 2019
Award	3 January 2019
Signed Call-Off Agreement/commencement date	14 January 2019
Implementation period	To 31 March 2019
Commencement of full service	1 April 2019

Submitting a Tender.

Should you decide to submit a tender response, be advised of the following:

- It is your responsibility to ensure that a fully compliant tender is submitted.
- By submitting a tender, you agree to be bound by the terms of this ITT and the Call-Off Agreement without further negotiation or amendment.
- It is suggested that you allow plenty of time for the entering your responses on to the Bravo portal – do not leave it until the day of the tender submission deadline.
- No additional attachments should be submitted with a tender unless specifically requested by NHS Digital.
- Only information entered in to the Bravo portal or provided as an attachment supplied in accordance with the NHS Digital's instructions will be taken into consideration for evaluation purposes.
- NHS Digital requires an all-inclusive fixed price for the delivery of each audit.
- Tender responses must be submitted in the English (UK) language.
- Answer all questions accurately and as fully as possible within limits specified.
- Where options are offered as a response to a question, select the relevant option.
- Do not answer questions by cross referring to other answers or to other materials (e.g. annual company reports located on a web site).
- NHS Digital may disregard any part of a response to a question which exceeds the specified limit (i.e. the excess will be disregarded, not the whole response).
- Tenders must be received by NHS Digital before the stated deadline in the procurement timetable
- Tenders received after the stated deadline will be excluded from this procurement.
- It is your responsibility for ensuring that your tender has been successfully completed and submitted prior to the stated deadline.
- Tenders must be submitted via the Bravo portal only.
- Tenders must remain valid and capable of acceptance by NHS Digital for a period of 30 calendar days following the submission deadline.
- You must not collude with nor disclose the fact of your intention to submit a tender to other potential providers.
- NHS Digital may disclose information provided by a tenderer where there is express provision to do so in accordance with Regulation 21 (2).
- Variant bids will not be accepted.

Questions and Clarifications

You may raise questions or seek clarification regarding any aspect of this procurement at any time prior to the deadline for submitting questions – please refer to the procurement timetable.

All questions must be submitted using the messaging facility provided within the Bravo portal.

To ensure that all potential providers have equal access to information regarding this procurement, NHS Digital will publish its responses to questions asked and or clarifications raised – subject to commercially confidential considerations and the NDA mentioned earlier in this document.

If you wish to ask a question or seek clarification in confidence please notify NHS Digital and provide your reasons for withholding the question and any response.

If NHS Digital does not consider that there is sufficient justification for withholding the question and the corresponding response, NHS Digital will inform you. You will have an opportunity to withdraw the question or clarification. If the question and or clarification is not withdrawn, then the response will be issued to all Potential Providers.

You are responsible for monitoring the Bravo portal for any responses to questions, general clarifications or other information issued by NHS Digital relating to this procurement.

Tender Evaluation Questions and Criteria

This document provides an overview of the methodology which will be used by NHS Digital to evaluate tender responses received by the stated deadline, including the methodology and scoring mechanism which NHS Digital will apply.

Evaluation of tender responses will take place in three separate stages:

- Qualification envelope (pass/fail)
- Technical envelope (overall weighting 70%)
- Commercial envelope (overall weighting 30%)

Tender Evaluation Process

NHS Digital's evaluation process for each envelope is explained below.

Qualification Envelope

NHS Digital will check each tender response to ensure it is compliant against the qualification envelope questions. Any non-compliant tender responses will be excluded from the procurement at this stage.

Technical Envelope

An evaluation panel will be convened to assess tender responses surviving the qualification envelope. Each evaluator will:

- evaluate individually in isolation, without conferring with other evaluators, by applying the stated criteria
- allocate a mark, along with their rationale, in accordance with the marking scheme explained in this document

When the independent evaluation exercise has been completed by all of the evaluators, a group consensus marking exercise will be coordinated by a consensus marker as follows:

The consensus marker will:

- review the marks allocated by the individual evaluators together with their rationale for awarding the marks
- arrange for the evaluators to meet and discuss the marks they have allocated
- facilitate discussion among the evaluators regarding the marks awarded and the related rationale
- record the consensus mark and the rationale for the consensus mark in to Bravo

The consensus process will continue until all responses have been consensus marked.

This will complete evaluation of the technical envelope.

Commercial Envelope

The commercial envelope will not be opened until the technical envelope evaluation is completed. Those involved in qualification or technical envelope evaluation will have no knowledge of financial envelope submissions.

After opening of the commercial envelope, price submissions will be entered in to Bravo.

The commercial envelope score will be added to the technical envelope score to determine the final total weighted score for each surviving tender response.

Award of Contract

The tender response awarded the highest total weighted score will be offered the contract.

Any contract award is subject to formal signature by both parties providing any pre-conditions are met e.g. certificates, statements and other means of proof where potential providers may have relied on self-certification.

Qualification Envelope

Work through the questions in the qualification envelope.

Some questions are mandatory and require a response. All such questions are indicated throughout the qualification envelope response form.

If you do not provide a response to any applicable question of the qualification envelope your tender may be deemed to be non-compliant.

If your tender is deemed to be non-compliant, it will be rejected and excluded from further participation in this procurement.

Technical Envelope

A summary of all the questions contained within the technical envelope, along with the marking scheme and maximum score available (where appropriate) for each question is set out below.

The technical envelope has an overall weighting of **70%**.

Each technical envelope question to be evaluated has a weighting applied to it as shown in this document. The individual question weighting is a percentage of the overall envelope weighting

Each technical envelope question will be scored on the following basis:

Response	How well does the response demonstrate an understanding of NHS Digital service requirements?	Score
Non-Compliant	Poor/No information received. Does not meet requirement/ poor standard as to provide no confidence that the service will meet requirement.	0
Weak	The proposed approach fails to demonstrate an adequate understanding of NHS Digital service requirements and objectives.	25

Acceptable	The proposed approach demonstrates an adequate understanding of NHS Digital service requirements and objectives and covers the key issues to an acceptable standard.	50
Good	The proposed approach demonstrates a good understanding of NHS Digital service requirements and objectives. It deals fully with the key issues over the life of the service	75
Excellent	The proposed approach has been tailored specifically to deliver NHS Digital service requirements and objectives, uses innovative approaches to deal comprehensively with the key issues and is likely to maximize performance.	100

The score of 0, 25, 50, 75 or 100 refers to the percentage of the maximum available mark for each technical envelope question to be scored as below.

Score	Percentage of the maximum mark available
0	0% of the maximum mark available for the question
25	25% of the maximum mark available for the question
50	50% of the maximum mark available for the question
75	75% of the maximum mark available for the question
100	100% of the maximum mark available for the question

Technical Envelope Questions

The technical envelope questions are as set out below. They are repeated in the Bravo portal, which is where you should enter/upload your response to each one.

The questions relate back to elements of the specification and how you propose to deliver them.

Be advised that whilst the questions concentrate on elements of the service which NHS Digital wishes to explore at the evaluation stage, it does not excuse or otherwise release a supplier from being able to provide a full service encompassing the entire specification/service requirement.

Core Requirements	Weight: 20%
Question Describe how you will deliver the core requirements as set out at section 2 of the specification document.	
Response Guidance Your response must clearly demonstrate: a) How you will make the services available to all NHS Digital Personnel including those working remotely, both in the UK and in postings overseas and/ or travelling overseas;	

- b) How you will ensure that all NHS Digital Personnel and Supplier Personnel are aware of the scope and limitations of patient and client confidentiality
- c) How you will ensure NHS Digital Personnel have access to and can obtain advice and support for (at minimum) the topics/subjects listed at paragraph 2.5 of the specification document

Your response should focus on the component parts of the question as above.

You should refrain from making generalised statements and providing information not relevant to the topic.

Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas.

Response Limit

Your response to this question is limited to six pages. A page is defined as one side of A4, font size Arial 11pt, single line spacing and minimum margin width of 2cm.

Anything in excess of the page limit will not be evaluated.

Mandatory Requirements	Weight: 60%
<p>Question</p> <p>Describe how you will deliver the mandatory requirements as set out at section 3 of the specification document.</p>	
<p>Response Guidance</p> <p>Your response must clearly demonstrate:</p> <ul style="list-style-type: none"> a) Online portal: <ul style="list-style-type: none"> • How you will ensure the portal is available “24x7” as per paragraph 3.1.1 • How you will brand the portal as per paragraph 3.1.2 • How you will ensure the portal contains at least the minimum content as per paragraph 3.1.3 • How you will arrange for the confidential questionnaire to be actioned as per paragraph 3.1.4 • How you will update the portal content to ensure content is current as per paragraph 3.1.6 b) Telephone Services, Triage and Support Services: <ul style="list-style-type: none"> • How you will provide a freephone and dedicated non-premium rate numbers available as per paragraph 3.2.1 • How you will ensure the freephone advice line is available “24x7” as per paragraph 3.2.2 • How you will ensure that the telephone support service is staffed by qualified and/or suitably trained personnel as per paragraph 3.2.3 	

- How you will ensure that “at risk” calls are identified and routed to a counsellor immediately as per paragraph 3.2.4
- How you will provide the range of triage services as per paragraph 3.2.5
- How you will make the service available to those with hearing difficulties or whose first language is not English as per paragraph 3.2.6
- How you will ensure that, where required, call backs following triage take place within two hours
- How you will ensure that queries which do not need counselling are completed within 24 hours

c) Bullying and Harassment Support:

- How you will provide the range of bullying and harassment support services at paragraphs 3.3.1 – 3.3.6

d) Whistleblowing Service

- How you will provide the range of whistleblowing services at paragraphs 3.4.1 – 3.4.3

e) Management Support Services

- How you will provide the range of management support services at paragraphs 3.5.1 – 3.5.4

f) Coaching and Counselling Services including Therapeutic Interventions

- How you will provide telephone, online and face-to-face, short term, focused coaching and counselling Services including Cognitive Behavioural Therapy (CBT) and other therapeutic interventions as per paragraph 3.6.1
- How you will assess NHS Digital Personnel presenting issues and determine the most appropriate form of intervention as per paragraph 3.6.2
- How you will provide short-term focussed face-to-face counselling as per paragraph 3.6.3
- How you will provide counselling to meet the requirements and timescales set out at paragraph 3.6.4
- How you will provide appointments within a reasonable travelling distance of the NHS Digital Personnel's home, but no more than one hour's travelling distance by public transport, from their home office location as per paragraph 3.6.12.
- How you will provide a secure online counselling service as set out at paragraph 3.6.15

g) Case Management

- How you will provide the range of case management services as set out at paragraphs 3.7.1 – 3.7.3

<p>h) Health and Wellbeing Promotion and Awareness</p> <ul style="list-style-type: none"> How you will provide, if required by NHS Digital from time to time, the range of health and wellbeing promotion and awareness services set out at paragraphs 3.8.1 – 3.8.8 <p>i) Publicity and Promotion</p> <ul style="list-style-type: none"> How you will provide, if required by NHS Digital, publicity and promotion services set out at paragraph 3.9.1 <p>Your response should focus on the component parts of the question as above.</p> <p>You should refrain from making generalised statements and providing information not relevant to the topic.</p> <p>Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas.</p> <p>Response Limit</p> <p>Your response to this question is limited to fifteen (15) pages. A page is defined as one side of A4, font size Arial 11pt, single line spacing and minimum margin width of 2cm.</p> <p>Anything in excess of the page limit will not be evaluated.</p>
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Implementation Plan	Weight: 10%
<p>Question</p> <p>Describe your approach service implementation, including your proposed implementation plan.</p>	
<p>Response Guidance</p> <p>Your response must clearly demonstrate:</p> <ol style="list-style-type: none"> How you will provide implementation support as set out at paragraph 3.11.1 Your service management process flow as per paragraph 3.11.2 Your proposed implementation plan including timings and resource <p>Your response should focus on the component parts of the question as above.</p> <p>You should refrain from making generalised statements and providing information not relevant to the topic.</p> <p>Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas.</p> <p>Response Limit</p> <p>Your response to this question is limited to six pages (including your implementation plan). A page is defined as one side of A4, font size Arial 11pt, single line spacing and minimum margin width of 2cm.</p>	

Anything in excess of the page limit will not be evaluated.

Management Information and Service Credits	Weight: 10%
Question Describe your approach to the provision of management information including the application of service credits as and when they arise.	
Response Guidance Your response must clearly demonstrate: d) How you collect and provide management information as set out in paragraphs 6.7.1 – 6.8.1 e) How you will manage the provision of the services to ensure that all service levels are met and apply service credits if service levels are not met as set out in Annex 3: Service Levels And Service Credits Your response should focus on the component parts of the question as above. You should refrain from making generalised statements and providing information not relevant to the topic. Whilst there will be no marks given to layout, spelling, punctuation and grammar, it will assist evaluators if attention is paid to these areas.	
Response Limit Your response to this question is limited to six pages. A page is defined as one side of A4, font size Arial 11pt, single line spacing and minimum margin width of 2cm. Anything in excess of the page limit will not be evaluated.	

Commercial Envelope

CHECK ALL X-REFS WHEN BUILDING IN BRAVO

The commercial envelope has an overall weighting of **30%**.

The successful tenderer's pricing proposal will be inserted at Schedule 3, Annex 1 of the contract document.

The commercial envelope contains price schedule spread sheet which shows each of the service elements NHS Digital requires (EAP1, EAP3, EAP4, EAP5, EAP10, EAP11).

Where possible, the spread sheet has been populated to give an indication of numbers involved.

Please download the spread sheet and populate it with your rates for each service element in the highlighted areas.

On each tab, enter in to the "total basket price" line the total amount based on a two year term:

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Upload your completed price schedule spread sheet in to Bravo.

Enter the total combined amount of each “total basket price” in to Bravo at 3.1.2.

That total amount will be used for commercial envelope evaluation purposes.

Your proposed pricing will be scored as follows.

The maximum commercial envelope score will be awarded to the tender with the lowest price.

The remaining tender responses will receive a mark based on the amount by which their price deviates from the lowest price, and which will be calculated as follows:

$$\text{Cost Score} = n\% * \frac{(\text{lowest price} * \text{Scaler}) - \text{price}}{(\text{Scaler}-1) * \text{lowest price}}$$

Where:

Scaler = 2

A negative calculation attracts a score of zero (0%)

NHS Digital reserves its right to seek clarification where it believes the price is abnormally low, and to reject tenders where the evidence supplied does not satisfactorily account for the low level of the price proposed.