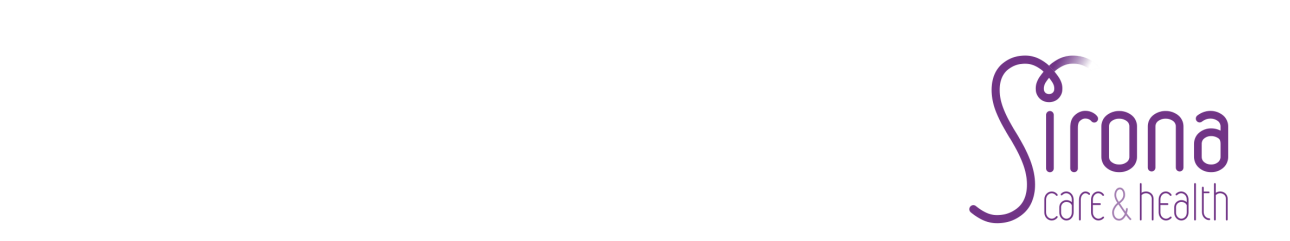
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**Occupational Health**

**Service Tender**

**Invitation to Tender**

This is an invitation to tender to provide Sirona care & health with Occupational Health services. Contained in this invitation is some general information about Sirona, estimated volumes of work, financial information and instructions to tenderers. Also included is a copy of our Occupational Health Service Specification.

If your organisation feels that you can provide the services we require as outlined in our Service Specification, and are interested in going into business with us, please submit a tender application. All tender submissions will undergo an evaluation process (outlined below), before a bid is accepted.

If you feel you cannot meet the required standards set out in our Service Specification, please specify what standards you can meet, and we will assess any variations on a case by case basis. Whilst cost is important, the quality of the service and how it fits into our organisational values is also important to us.

We will be accepting tender submissions from 29th March 2018 until 26th April 2018.

**Section 1 – About Sirona:**

**1.1 Background Information on Sirona**

Sirona care & health is a Community Interest Company that provides community health and adult social care services and was established in October 2011. As a not for profit social enterprise, we exist to deliver benefit to the communities we serve; any profits we make are reinvested into services and staff development.  We have no shareholders and we do not pay any dividends. We provide a range of community children’s and adults health services and adult social care services across different geographical areas including South Gloucestershire, Bristol, and Bath and North East Somerset.

Sirona is not part of the NHS, but we provide NHS funded services. This means they continue to be free at the point of delivery and we are accountable to NHS bodies for the standards of service we provide.  We are inspected regularly by the Care Quality Commission (CQC).

Although we are still relatively young as an organisation, our services have a long and successful track record within the NHS and local authorities, and many of our staff have transferred in from local authorities and NHS trusts. As of January 2018, we employ 1191 members of staff. Below is a breakdown of these staff, grouped by role.

|  |  |
| --- | --- |
| **Role** | **Number of staff** |
| Admin and Clerical | 272 |
| AHP | 129 |
| Ancillary | 58 |
| Doctor | 32 |
| Nursing | 312 |
| Support workers / HCAs | 388 |
| **Total staff:** | **1191** |
| Bank Staff | 523 |
| **Total including Bank Staff** | **1714** |

Although we are an independent organisation, our roots are firmly within public service. Our ethos and culture is driven by our commitment to working with others to ensure a joined up approach to health and social care, with the focus consistently on helping individuals to achieve their goals.

Our headquarters are at Kingswood Civic Centre in Kingswood, Bristol. However, our staff work across a wide geographical area so we have many offices and bases. Usually, these are shared with other service providers such as GPs; hospital staff; local authority colleagues or specialist providers such as mental health teams.   We also share facilities with some voluntary bodies.

**1.2 Responsible and Sustainable Procurement**

‘Taking It Personally’ is part of Sirona care & health’s core values, which underpin all that we do. We aim to make a difference by providing health and social care services. We ensure that everyone who comes into contact with us feels welcomed, supported, safe and valued. As part of our commitment to a fair and responsible procurement process, we would like to hear from tenderers who feel they match our core values.

Sirona care & health is also committed to following the principles of the Managing Public Money framework (HM Treasury, 2012), which encourages free and open competition during procurement processes. The framework also encourages an emphasis on both quality and cost.

**Section 2 – What we are looking for:**

**2.1 Requirement for Occupational Health and Employee Assistance Programme**

Sirona has a requirement to procure a professional Occupational Health service - which includes the provision of an Employee Assistance Programme (EAP) - to enable us to meet our responsibilities for the health, safety and well-being of our employees.

The role of the Occupational Health Service Contractor(s) will be to provide advice and recommendations to management to consider, and to provide health and wellbeing support to staff.

We are seeking offers from appropriate organisations for the provision of these services on a contractual basis. Such organisations may sub-contract part of these services to another organisation, providing they meet the requirements of our service specification.

**2.2 Scope**

The scope of this tender covers the provision of a comprehensive range of Occupational Health and safety services both face to face and via telephone, including; pre-employment screening, medical referrals, capability/ Ill Health retirement assessments, case conferences, policy guidance and best practice advice, workstation assessments, employee assistance programme, and the provision of immunisations and vaccinations for the workplace. For a comprehensive list of requirements, please refer to the Service Specification.

Quality of service is just as important as cost and this is accounted for in the evaluation process of tenders.

**2.3 Contract Duration**

The contract will last for the period 1st June 2018 to 1st June 2020, with the option to extend up to 12 months by mutual agreement.

**Section 3 – Finances:**

**3.1 Contract Value**

The estimated value of this tender should fall within £52,000 – £58,000 (inclusive of VAT where applicable) to cover all costs over the full 12 month contract period. The exact value of the contract will depend on the services requested during the contract period or headcount; the value is not guaranteed and may be less than the amount indicated.

Public sector finances are under increasing pressure and scrutiny and we are therefore looking to ensure best value for money for all activities.

**3.2 Pricing Information**

Prices should be fully inclusive of any charges incurred by the supplier in the delivery of this service, including travel, expenses etc. and must be submitted in accordance with the requirements of the Pricing Schedule attached. All tendered rates/prices and any payments under a resulting contract shall be in pounds sterling. If you will be charging VAT on any elements of the contract (for example if your organisation needs to treat any elements as individual activities rather than a composite health supply) this must be indicated in the pricing schedule.

The prices submitted at the time of tender must be fixed for a 3 year period (until 1st June 2021).

**Section 4 – Instructions to Tenderers:**

|  |  |
| --- | --- |
| **Event** | **Date** |
| Tender invitations sent | 29th March 2018 |
| Tender submission deadline | 26th April 2018 |
| Tender meetings notifications *(conditional)* | 2nd May 2018 |
| Tender meetings deadline *(conditional)* | 9th May 2018 |
| Award of Contract deadline | 11th May 2018 |
| Contract commencement date | 1st June 2018 |

**4.1 Key Timelines**

The above dates are indicative, and may be subject to change.

**4.2 Tender requirements**

A tender should include; a response to all of the evaluation questions as part of the tender; a completed pricing schedule; and copies of any relevant certificates as requested.

|  |  |
| --- | --- |
| **Item to Complete** | **No. Copies Required** |
| Selection Criteria Response | 1 |
| Award Criteria Response | 1 |
| Pricing Schedule Response | 1 |
| Insurance information | 1 |
| Copies of any relevant documents as requested in the award criteria response | Unknown |
| Copies of financial accounts | One copy of the last 3 years |

**4.3 Questions**

Please forward any questions to the following inbox:

[OH.tender@sirona-cic.org.uk](mailto:OH.tender@sirona-cic.org.uk)

To ensure fairness, we will circulate reponses to all questions received to every tenderer.

**4.4 Submission of Tender**

Your submission should be sent to the following email address:

[OH.tender@sirona-cic.org.uk](mailto:OH.tender@sirona-cic.org.uk)

Alternatively, you may post it to:

Taylor Pryer-Freeman

Sirona care & health

Kingswood Civic Centre

Kingswood High Street

Bristol BS15 9TR

The deadline for receipt of submissions is: **15:00** on **26th April 2018.**

Should you require assistance with submission, please contact Taylor Pryer-Freeman, Workforce Transformation Manager on 0300 124 5454 or email OH.tender@sirona-cic.org.uk.

**Section 5 – Conditions of Tender:**

**5.1 Tender Responses**

Only information provided as a direct response to the tender questionnaire will be evaluated.

Tenderers should respond to each question on the basis that Sirona has no prior knowledge of their organisation. Information and detail which forms part of general company literature or promotional brochures etc. will not form part of the evaluation process. Marketing material should not be included.

Sirona reserve the right to request clarification on any part of a response received.

**5.2 Accuracy of Tender**

You should check the accuracy of your tender prior to submission. A tender containing errors or omissions may, at our discretion, be referred back to you for correction or may be disqualified.

**5.3 Meeting the Service Specification Requirements**

You should indicate in your tender submission if there are any areas in the Service Specification that you will not be able to comply with, and where appropriate, state what you will be able to provide as a substitution.

**5.4 Changes to the Tender Procedure**

We reserve the right to change the tender process, including timescales and procedures.

**5.5 Incurred Tender & Other Expenses**

Sirona will not pay any costs and expenses which may be incurred by you in connection with the preparation, submission, presentation or clarification of your tender.

**5.6** **Data Protection**

All information supplied to Tenderers in connection with this procurement exercise shall be regarded as confidential.

Any data provided by Tenderers will need to comply with all data protection legislation at the time of submission.

**Section 6 – Evaluation of Tender Submissions:**

Evaluation of tenders will be carried out by a panel of staff members to ensure a fair process.

**6.1 Selection Criteria**

Before evaluating a tender response questionnaire and/or a pricing schedule (the award criteria), the selection criteria (below) will be applied:

|  |  |  |
| --- | --- | --- |
| **Selection Criteria** | | **Assessment** |
| Completion of Tenderers details | Tenderers must complete all requested information. Any incomplete submissions may be automatically declined. | Pass / Fail |
| Professional Accreditation | Tenderers must confirm they hold the appropriate professional accreditation. Failure to do so will result in a submission being rejected. | Pass / Fail |
| Insurance | Tenderers are required to provide copies of insurances detailed within the response questionnaire. Any inability to do so may result in an automatic submission decline. | Pass / Fail |
| Financial stability  *Note: This criterion will be assessed once the successful tenderer is identified* | Tenders are required to meet the financial stability criteria defined within the response questionnaire.  If financial issues cannot be resolved, Sirona may decline the tender submission and refer to the next highest scoring tenderer. | Pass / Fail |

**6.2 Award Criteria**

The award criteria will be based on the following:

1. **Quality – 50% weighting**

The evaluation of the tenderer’s response questionnaire.

1. **Cost – 50% weighting**

The evaluation of the tenderer’s pricing schedule.

**Quality:**

Panel members will score each questionnaire response out of 4, reflecting their reasoned professional judgement as to the merits of each response in conjunction with Sirona’s Service Specification requirement. An average score will then be taken.

Each score will be decided using the following methodology:

|  |  |  |
| --- | --- | --- |
| **0** | **Unacceptable** | Nil or inadequate response. Fails to demonstrate an ability to meet the requirement. |
| **1** | **Poor** | Response is partially relevant and poor. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled. |
| **2** | **Acceptable** | Response is relevant and acceptable. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas. |
| **3** | **Good** | Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled. |
| **4** | **Excellent** | Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full. |

**Cost:**

Sirona will conduct the following evaluation on pricing schedules submitted:

A bid of £50,000 or lower will receive a score of 100%. The score will reduce by 3% for every £1,000 increase from £50,000 up to a £60,000. If the bid exceeds £60,000 the score will reduce by a 5% every £1,000 increase. Please see examples below to illustrate the cost evaluation process:

|  |  |
| --- | --- |
| **Bid received (as an example)** | **Score obtained** |
| £50,000 or lower | 100% |
| £51,000 | 97% |
| £52,000 | 94% |
| £53,000 | 91% |
| £60,000 | 70% |
| £61,000 | 65% |

**6.3 Tender Meetings**

Sirona may choose to hold tender meetings where there are several high scoring tenderers, all scoring within a reasonable difference from each other.

If tenders meetings are organised, the evaluation procedure for these will be outlined and sent to the relevant tenderers.

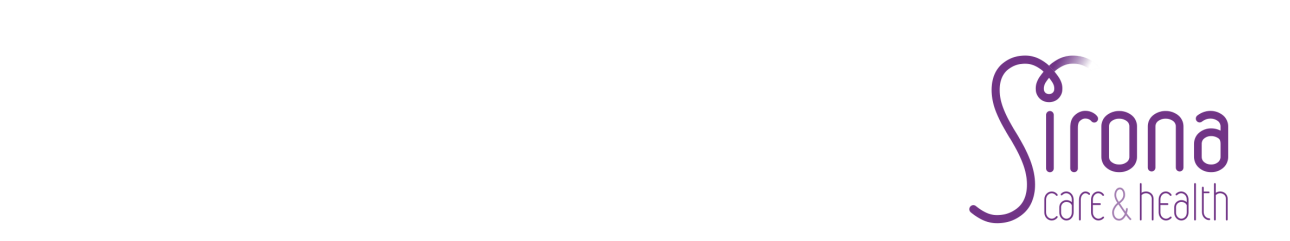
**6.4 Awarding the contract**

All tender submissions will be evaluated following the process outlined above. Following this, a contract will be awarded to a single tenderer and this will be confirmed in writing.

Please note that all tenderers that submit unsuccessful bids will also be informed of the outcome in writing.

Please also note that Sirona will not be bound to accept any tender submitting resulting from this invitation to tender; however, we do reserve the right to accept all or part of any offer.

**If you submit a tender, you will be deemed to have understood fully the requirements of this Invitation to Tender.**



**Occupational Health**

**Service Specification**

1. **Qualifications of Key Service Providers**
2. **Service management**

The service provider must meet the standards for a Safe Efficient Quality Occupational Health Service (SEQOHS), published by the Faculty of Occupational Medicine (FOM). This can be demonstrated by accreditation or by the provision of equivalent evidence in some other way.

1. **Doctor**

The service must be under the clinical direction of a registered medical practitioner who is a member of the Faculty of Occupational Medicine, and has appropriate experience. Other doctors should hold an occupational health qualification, or be working towards such a qualification, under the supervision of a member of the Faculty of Occupational Medicine.

1. **Nurse**

The nursing work should be carried out by an occupational health nurse practitioner, or by a registered general nurse training for an occupational health qualification, under the supervision of an occupational health nurse practitioner.

1. **Other Professionals**

Where the service makes use of other professionals, such as physiotherapists, they must ensure that they are qualified to a level that is acceptable to Sirona care & health.

1. **Qualifications from outside the United Kingdom**

In all cases, equivalent qualifications from outside the United Kingdom will be acceptable: the service provider will be expected to demonstrate that such qualifications are equivalent.

**2. Other Service Elements**

1. **Provision of Cover**

The services will be required during any working week, but not on bank holidays. Sirona care & health will expect that cover will be arranged in the event of annual leave, sickness or any other absence of staff.

1. **Selecting Appropriate Level of Service**

Where elements of service may be provided by an appropriately qualified nurse or by a doctor, or by some other practitioner, depending on the particular nature of the case, the service provider may decide which professional is the most appropriate to provide service. The service provider should ensure that clear criteria exist to assist in making this decision and those criteria should be agreed with Sirona care & health’s Occupational Health Lead.

Clerical and administrative cover shall be provided by the service provider.

1. **Location of Service**

The service must be provided from a location acceptable to Sirona care & health. It should be physically accessible to all employees, whatever their condition and means of transport.

Suitable accommodation meeting these requirements, with properly equipped consulting rooms, must be situated within 10 miles of Sirona care & health’s boundaries. This currently extends throughout Bath & North East Somerset, South Gloucestershire and Bristol.

Where on-site services are provided, the Sirona base used for calculating travel costs.

1. **Methods of Contact and Communications**

The service provider should establish a contact and communications system that enables Sirona care & health to contact the service efficiently, to ensure that key information is communicated in a timely fashion and that where necessary clarification of matters within correspondence can be sought and provided quickly. This should include use of electronic communications but will also include the option of alternative forms of communication, for example paper copies of reports in certain circumstances.

The detail of the communications methods will be agreed and evaluated in the course of the regular contract meetings.

**E) KPIs & Quality Monitoring**

The service provider must undertake monitoring to enable the quality of the service delivery to be evaluated. As part of this, the provider must report on all agreed KPIs within the contract on a monthly basis. If any KPIs are not met, a rationale must be provided, and where necessary, an action plan to improve performance.

Further monitoring measures may be agreed at contract meetings with Sirona care & health’s Occupational Health Lead, and will include agreed performance measures related to service levels, timescales and satisfaction survey information related to employees and managers.

**F) Records and Monthly Reports**

Records must be kept of all referrals and other elements of work. Monthly reports will be required to enable oversight of the performance of the contract. The detail of the reports will be agreed with Sirona care & health’s Occupational Health lead in the course of the contract.

Individual health and medical records will be kept by the service provider as necessary, and in accordance with all of the relevant legislation, including that relating to Data Protection, Access to Medical Reports and Health Records, and Health & Safety.

At the end of the contract term the service provider will ensure that the individual records are passed on to the next service provider, where this is necessary, in order for the next provider to manage that information effectively and in compliance with relevant statutory duties.

**G) Meetings**

There shall be meetings, as required, between Sirona care & health’s Occupational Health Lead and the service provider to maintain liaison, review quality, scope and nature of the service, and address other relevant matters. These shall normally be quarterly, but there may be additional meetings if necessary. Where appropriate, Sirona’s Infection Prevention and control lead may also attend these meetings.

**H) Service Volumes and Costing**

At the beginning of each year Sirona care & health will indicate the anticipated level of service and the cost of that service, based on the prices quoted in the tender and the projected demand for service that Sirona care & health expects. This will form the basis of the charge for the service during the year. As the year progresses, the actual levels of service will be measured and the price for the service will be adjusted if the service levels differ from that which is projected.

**I) Telephone Consultations**

The service provider may make use of telephone consultations rather than face-to-face appointments provided that there are clear criteria for deciding when this approach is suitable, and provided that it forms part of an integrated service so that continuity is maintained if it becomes necessary to move towards more direct contact.

**J) Missed appointments**

Where an appointment is made to respond to a referral or for a pre-employment medical examination, and the employee/candidate misses the appointment or cancels less than 24 hours before the appointment time, the service provider can charge for that appointment if they have been unable to obtain a replacement for that appointment. The charge will be the same as that for the initial appointment.

Where an appointment is missed or cancelled at late notice, the service provider should contact the relevant HR representative and/or the line manager for that case immediately so that they can respond appropriately.

If the service provider considers it appropriate to offer a new appointment to a person who has missed the appointment, then Sirona care & health should be informed of this. Normally the new appointment will need to be confirmed by HR or the line manager.

**K) Complaints**

The service provider must operate a procedure to respond to complaints by employees or managers, and provide Sirona care & health’s Occupational Health Lead with general information on the outcomes of complaints.

**L) End of Contract**

At the end of the contract term, the service provider should ensure that records are kept to enable continuity of service and case management, and that where necessary adequate handover arrangements are made to any successor occupational health provider or other organisation. This includes, but is not limited to, issues related to medical records.

**M) Service Quality**

It is of great importance that the service quality meets the requirements of Sirona care & health. The service must be delivered by professionally qualified staff to an appropriate level and it must have arrangements for ensuring compliance with requirements related to confidentiality, data protection, health & safety, equalities and other statutory requirements.

Where advice or opinions are sought, the Occupational Health Service must be clear and unambiguous, and must take into consideration the organisational requirements related to the workplace, the practicality of any recommendations and Sirona care & health’s policies.

The scope of the opinions should relate to the questions raised, but if the provider considers that wider matters should be considered that may not be specific to the referral, then those matters should be raised separately to the individual referral response.

Where matters are raised within a consultation that are not apparent from the referral, we expect the service provider to check these out with HR or line management before confirming advice if it is likely to have a material impact on the advice.

The service must be easily accessible through clear and efficient communication channels. Delayed access to the service or to reports can have a significant detrimental impact on the effectiveness of the recruitment process and/or management action, and the benefit to employees. For this reason the timescales indicated in the specification will need to be closely followed and monitored. Sirona care & health will take action through the contract in response to failure to meet the timescale or quality requirements, where attempts to improve have been unsuccessful. The detail of the monitoring and improvement planning (if necessary) will be agreed during the contract set-up process.

Good performance in respect of quality and responsiveness will be taken into account by the Sirona care & health when considering the extension of the contract term.

Where Sirona switches providers, any case work outstanding from the previous provider must be transferred to the new provider. These cases must be prioritised and proactively managed by the new provider.

**3. Detail of Services**

1. **Pre-employment Health Screening**

**Description**

* Assess and evaluate on-line health questionnaire sent by prospective employee.Make further inquiries if necessary to form opinion.
* Send Written Report to appropriate HR Representative regarding the person’s medical condition and implications for the person’s ability to undertake the full range of duties and responsibilities attached to the job, including matters where adjustments might be necessary.
* Include details related to Equalities, food handling, night work and special work-related risks where they are relevant.
* Electronic questionnaire systems are acceptable:

**KPI**

|  |  |
| --- | --- |
| Report sent within 24 working hours of receipt of completed questionnaire, unless additional appointments/reports are required. | **Target** |
| 90% achieved |

**Minimum Qualifications**

Forms to be evaluated under qualified Occupational Health Nurse direction

**Indicative Service Volumes**

Estimated numbers of questionnaires in recent years: 400 - 450 per year

**Charging**

As agreed in the pricing schedule

1. **Pre-employment Medical Examination**

**Description**

* Where the contents of the pre-employment health questionnaire indicate it is necessary, carry out a pre-employment medical examination, and send a report on the conclusions to the appropriate HR Representative.
* The report should also follow the description highlighted above (in 3A).

**KPI**

|  |  |
| --- | --- |
| Examination to be held within 5 working days of evaluation of pre-employment question | **Target** |
| 80% achieved |
| Report sent within 2 working days of receipt of examination | 90% achieved |

**Minimum Qualifications**

Examination and report by Occupational Health Nurse or Registered medical practitioner, depending on the nature of the case.

**Charging**

As agreed in the pricing schedule.

1. **Medical Referrals**

**Description**

* Arrange an appointment or telephone consultation (where appropriate) for an employee in response to a request from management to address any health issues which may be having an impact on the employee’s role.
* To offer an urgent response process for cases with exceptional circumstances – which will be determined by a member of Sirona’s HR team.
* Consider the need for GP or other health report to assist in forming opinion, and obtaining that report where necessary.
* Provide a written report including information relevant to Sirona care & health’s operational needs, including but not limited to:
  + An opinion about the employee’s fitness to undertake the full range of duties related to their job
  + Whether any workplace adjustment, task modifications or other action would be appropriate – including advising of Sirona’s internal staff physiotherapy service where appropriate.
  + Advise on likely timescales where possible (for example a return to work date in relation to long-term sickness absence), and whether further occupational health involvement would be needed.
* Attend case conferences on-site where agreed, to discuss an individual’s case.
* Attend home visits where agreed, with a member of the HR team.
* An opinion regarding whether the employee is covered under the Equality Act legislation in relation to their health.
* Whether the employee’s health condition is sufficiently serious and long lasting to consider redeployment, rehabilitation, dismissal or other action management may find appropriate.
* Whether the criteria for ill-health retirement under the relevant pension scheme are likely to be met.
* To conduct workplace assessments, including environmental assessments and night worker evaluations where required (indicative volumes not known)
* Respond to requests for clarification of the content of reports and their implications, and advise to help case management.
* Retain appropriate records.

**KPI**

|  |  |
| --- | --- |
| Initial appointment to be held within 5 working days of receipt of referral request | **Target** |
| 80% achieved |
| Report sent within 3 working days of receipt of examination (allowing for an additional period of up to 5 days for employee consent). | 90% achieved |

**Minimum Qualifications**

Clear criteria should be established to indicate when it is appropriate for cases to be dealt with by an occupational health nurse, and when by a doctor or any other practitioner.

Similar criteria should also be in place to indicate when a telephone consultation is appropriate.

**Indicative Service Volumes**

Estimated volumes in recent years: 60 - 80 per year.

**Charging**

As agreed in the pricing schedule.

1. **Ill-health Retirement (through a Medical Referral)**

**Description**

* Obtain independent doctor authorisation for ill health retirement in compliance with the requirements of the relevant pension scheme.
* If ill-health retirement is recommended and the criteria are met, the doctor will be required to prepare and/ or collate relevant medical evidence for submission to the pension provider in support of any applications made.

**KPI**

|  |  |
| --- | --- |
| Initial appointment within 5 working days of receipt of referral request questionnaire. | **Target** |
| 80% achieved |
| Report sent within 3 working days of receipt of examination. | 90% achieved |

**Minimum Qualifications**

Independent medical practitioner to satisfy standards of the relevant pension schemes.

**Indicative Service Volumes**

Estimated number of ill-health retirements in recent years: less than 10 per year.

**Charging**

As agreed in the pricing schedule.

1. **Referral to other medical practitioner for report, assessment etc.**

**Description**

* Make referral to another practitioner (such as a general practitioner or specialist) for an opinion to enable timely information to be available in individual cases agreed with management.
* This is normally to complete a response to a referral or pre-employment medical examination.

**KPI**

|  |  |
| --- | --- |
| Request to other practitioner within 3 working days of agreement to proceed. | **Target** |
| 90% achieved |
| Report from occupational health to appropriate HR Representative within 3 working days of receipt of report from specialist. | 90% achieved |
| Chase up reports from specialist after 10 days if not received. | 100% achieved |
| Notify appropriate HR Representative if reports are delayed by specialist despite attempts to pursue requests for reports. | 100% achieved |

**Minimum Qualifications**

To be agreed on a case-specific basis  
 **Charging**

As agreed in the pricing schedule.

1. **Employee Assistance Programme (EAP)**

**Description**

* To provide a confidential counselling support service for employees, to cover a range of issue.
* To provide suitable accommodation to deliver the counselling local to our staff.
* To ensure that the service is led by qualified counselling professionals.
* To ensure that employees have the appropriate level of support and contact during their counselling sessions.

**KPI**

|  |  |
| --- | --- |
| Initial appointment arranged within 5 days of receiving the request | **Target** |
| 80% achieved |

**Minimum Qualifications**

Relevant counselling qualification and experience

**Charging**

As agreed in the pricing schedule.

1. **Vaccinations & Immunisations**

All new employees should undergo a pre-employment health assessment, which should include a review of immunisation and vaccination needs based on those that are nationally recommended for the role. This decision should also take into account the safety and efficacy of available vaccines. Staff not considered to be at risk need not routinely be offered immunisation, although post-exposure prophylaxis may occasionally be indicated.

Due to the need to be able to demonstrate an effective employee immunisation programme is in place, where applicable pre-employment and routine vaccinations should be arranged by the service provider through clinics. Depending on the employee’s role, they may need one of the following immunisations or vaccinations:

* Hand skin assessment
* Tuberculosis (signs & symptoms)
* BCG history/ scar check
* Measles and rubella
* Varicella (chicken pox)
* BCG vaccination
* Full course of Hepatitis B vaccines
* Hepatitis B antibody blood test
* Hepatitis B 5 year booster vaccine
* Course of Hepatitis A vaccines
* EPP clearance (HIV, Hepatitis B, Hepatitis C)

There may also be the need for the service provider to support with any non-routine vaccinations (for example the influenza vaccine) if agreed with Sirona care & health’s Occupational Health Lead.

**Minimum Qualifications**

Relevant qualification and experience.

**Charging**

As agreed in the pricing schedule.

1. **Health promotion**

**Description**

To provide on-site support and/or training packages to staff and management on health surveillance and promotion, at a time and location to be agreed between Sirona and the provider.

**Charging**

To be agreed on an ad—hoc basis

1. **Occupational Health Advice & Monitoring**

**Description**

* Provide advice on matters of occupational health related policy and practice, to help Sirona care & health to develop its arrangements.
* Provide administrative services and recording systems to enable the service to be delivered effectively and efficiently.
* Provide monitoring information, including statistical information, on a monthly basis to enable the activity, quality and performance within the contract to be monitored and evaluated. The detail of this information will be agreed between Sirona care & health and the service provider in the contract set-up, and reviewed in monitoring meetings.
* Attend monitoring meetings with Sirona care & health’s Occupational Health Lead on up to four occasions a year . Other meetings may be scheduled where necessary. The detail of the reports will be agreed with Sirona care & health’s Occupational Health Lead.
* Maintain occupational health records relating to all of Sirona care & health’s employees, and to pass on the records to a successor service provider at the end of the contract period if necessary.

**Charging**

These items will be included as overhead costs within the other features of the work and charging arrangements, unless separately detailed within the pricing schedule.

###### **Sirona header.pdf**

**Selection Criteria Response**

###### **Tenderers details – Background Information** **Pass / Fail**

* 1. All personal information supplied will be treated as confidential and will be subject to the Data Protection Act 1998.   In this section ‘Organisation’ refers to the organisation detailed in question 1 below.

|  |  |
| --- | --- |
| Name of organisation  (Organisation either tendering or acting as lead contact where a consortium bid is being submitted) |  |
| Address for all correspondence (including town/city and postcode) |  |
| Contact details for enquiries (contact name and title) |  |
| Telephone number (including dialling code) |  |
| E-mail address of the contact |  |
| Website address (if applicable) |  |
| Address of registered office (property name, street, town, county, postcode if applicable) |  |
| Nature of organisation  (E.g. PLC, partnership etc) |  |
| **Group**  If the organisation is a member of a group of companies, please give the name and address and any company registration number of the immediate parent company and ultimate parent company if applicable.  (For parent companies established outside the UK, equivalent information as set out in Regulation 23 of the Regulations) |  |
| If the organisation is a division or subsidiary, what is the relationship with the parent company? (ownership, directorship, authority etc) |  |
| Provide a brief history of the organisation in no more than 400 words, including details of any parent and associated companies and any changes of ownership over the last 5 years including details of significant pending developments, changes in financial structure or ownership, prospective take-over bids, buy-outs and closures, etc which are currently in the public domain. |  |
| VAT registration number (or alternative EU registration number) of the organisation |  |

1. **Professional Accreditation Pass /Fail**

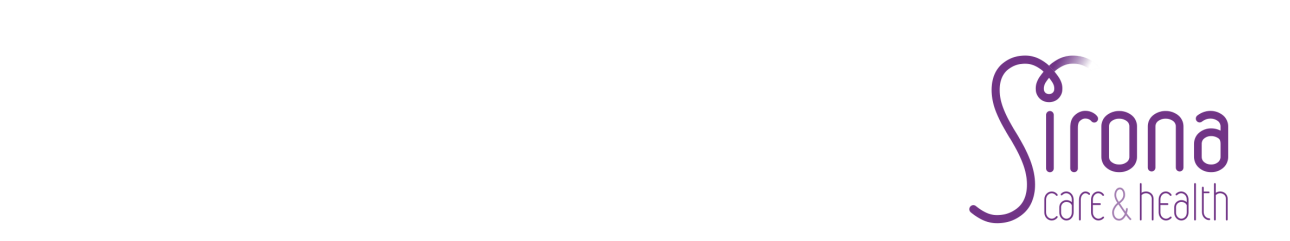
|  |  |
| --- | --- |
| Please confirm that all staff within your organisation who will be involved in delivering the Service are appropriately trained, and that those providing Occupational Health Services are appropriately trained, qualified and registered with an accredited professional body such as those listed below:-  General Medical Council (GMC)  Nursing & Midwifery Council (NMC)  Health & Care Professions Council (HPC)  Please confirm that your organisation is accredited with the following scheme:  Safe, Effective, Quality Occupational Health Service (SEQOHS) | Yes  No  Yes  No |

1. **Insurance Pass/Fail**

|  |  |
| --- | --- |
| **It is a requirement of this contract that tenderers hold the levels of insurance indicated below:**  **Public Liability Insurance = £10M**  **Professional Indemnity Insurance = £5M** | |
| Please confirm below whether you already have or can commit to obtain, prior to the commencement of the contract, the levels of insurance cover indicated. Bidders that do not have, or cannot commit to obtain the required levels of insurance may be excluded from further participation in this procurement exercise.  **Copies of all certificates should be provided with your response** | |
| Public Liability Insurance | Yes, I already have this - please provide a copy of Insurance Certificate  I do not currently have but I am willing to obtain  No, I do not have and I am not willing to obtain |
| Professional Indemnity Insurance | Yes, I already have this - please provide a copy of Insurance Certificate  I do not currently have but I am willing to obtain  No, I do not have and I am not willing to obtain |

1. **Published Accounts Pass /Fail**

|  |  |
| --- | --- |
| Please include copies of your published financial accounts for the past 3 years.  The purpose of this section is to assess risk of insolvency. It shall be at Sirona’s discretion whether the risk is deemed acceptable. | Yes  No |

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**Award Criteria Response**

Please answer the following questions as part of your application process. Please use additional paper if necessary and provide any documentation separately:

|  |  |
| --- | --- |
| Name of organisation: |  |
| Person applying on behalf of the organisation: |  |
| Position in your organisation: |  |
| Telephone number: |  |
| E-mail: |  |

**Service Provider Information:**

1. What are your operating hours (please indicate when your service will be closed)? Please also explain how you will ensure that the service is covered efficiently in the event of annual leave, sickness absence etc.
2. Please explain how you assess which type of qualified professional undertakes each specific element of service delivery?

**Accessibility**

1. Sirona care and health’s services currently extend throughout Bath & North East Somerset, South Gloucestershire and Bristol. To illustrate our geographical spread, we have services located from Midsomer Norton and Bath, through to Bristol, Yate and Thornbury. Please can you explain how you will ensure your service is accessible to all employees.

When answering this question please consider and state:

* The location(s) of your accommodation.
* Whether this accommodation is a permanent or temporary base.
* If the accommodation is a temporary base, please state what the arrangements are for you using this accommodation (e.g. frequency).
* How the accommodation meets the accessibility needs of Sirona care & health – taking into consideration our geographical spread.

**Customer Service & Communication**

1. Please describe what steps you take to ensure that the service is operated efficiently. Specifically provide details on the following:

* The systems you have in place to communicate with employees, managers and HR?
* How this system provides a timely, informative and responsive service?
* Any communication touchpoints with key stakeholders.

1. How would you adjust this system to communicate with service users who cannot access a computer?

**Quality of Service**

1. Please review the KPI targets included in the service specification. Please comment on how you will be able to perform against each of these, and what you will do if you are not meeting them.
2. Other than achieving KPIs, how else will you monitor the quality of the service?
3. What steps do you take to comply with the following legislation:

* Data Protection
* Access to Medical Reports and Health Records
* Health and Safety

Please include details of access, storage and erasure.

1. Please explain what you would do in the event of Sirona having to raise a complaint.

**Details of Specific Services**

1. Please review the details of the service needs in the service specification and provide the details requested below.

Pre – employment Health Screening & Examination

Please describe how your procedures operate to undertake pre-employment health screening – covering the questions:

* How are the questions sent to the prospective employees?
* What questions are asked and how are the answers evaluated?
* If a medical examination is necessary, how is the appointment arranged?
* If an employee does not attend an appointment, how is this rescheduled?
* How do you communicate outcomes to Sirona’s HR team?

Please also describe how records are maintained.

*Please also provide the following: a copy of a pre-employment health questionnaire, an example outcome of fit for work and an example outcome where reasonable adjustments are required. Please ensure any confidential information is removed/ protected.*

Medical Referrals

Please describe your procedure to manage medical referrals, requesting an occupational health opinion in relation to an individual’s state of health and wellbeing.

Include a brief indication of how:

* Requests are received
* Urgent cases are identified
* Cases are allocated to the most appropriate type of clinician
* Employees are contacted to arrange a consultation
* Consultations are carried out
* Employee consent is obtained
* Further information is requested from another medical practitioner
* You communicate with HR and/or the Manager
* You attend case conferences – if required
* Reports are sent to management
* Records are maintained

Please also provide a copy of the template referral form/guidance documentation which managers and HR receive

Please send us a copy of letters or reports that you have sent to previous clients providing advice on the following four types of situation. *Any information which could identify a particular individual or organisation should be removed.*

A) Long term sickness absence where there may be a need to consider redeployment or ill health dismissal/ retirement

B) Advice on adaptations to a workplace or work task for an individual, where the Equalities Act may apply.

C) Advice on how to manage the sickness absence of an individual where there is no underlying health-related issue.

D) Advice in a situation where an absent employee may not be fit to work, but may be fit to attend a meeting or hearing.

Please provide details of the process that you follow with ill-health retirement cases in line with the relevant pension schemes. Sirona largely work with NHS pensions, the Royal London Pension scheme and the Avon Pension Scheme.

Immunisations and Vaccinations

Please describe how the service provider will comply with the immunisation and vaccination requirements of Sirona care & health. Please include details of:

* The process by which new employees receive immunisations and vaccinations as part of their pre-employment screening
* How routine and non-routine immunisations and vaccinations are tracked, monitored and followed up for existing employees
* The process through which employees are invited to attend an appointment and follow ups
* The process through which an appointment is rescheduled if an employee does not attend an appointment
* Where vaccinations and immunisations can be provided – considering our large geographical spread
* What system you have in place to identify vaccination and immunisation requirements specific to each role

Ill-health Retirement

Employee Assistance Programme

Please describe how you provide EAP services. Please include details of:

* Where the service is offered
* How you respond to requests from employees and/or manager and/or HR
* The qualifications, skills and experience of the staff delivering the service
* The average length of treatment
* How employees can self-refer

Health Promotion

Please describe what additional support you can offer our staff and/or managers to promote healthy lifestyles.

**Missed or Cancelled Appointments**

1. Please describe the process if an employee misses an appointment. Please include details:

* The procedure to rearrange an appointment
* Timeframes for cancellation
* Charging framework
* How you communicate with HR and/or the manager on missed or cancelled appointments

**IT Systems**

1. Please provide information of any IT systems you currently have in place and explain how they will operate in practice. Include details of:

* The system’s functionality
* Access
* Any feedback you have received of your system

*If your application is shortlisted, we may ask to see a demo of your system.*

**Implementation and Exit Management**

1. Please provide an implementation plan (including timeframes) for the transition of services, should you be awarded the contract, and also include an exit plan for when the contract comes to an end.

Please include details of how on-going cases will be transferred to you, and how you will pick these up.

1. ‘Taking It Personally’ is part of Sirona care & health’s core values, which underpin all that we do. We aim to make a difference by providing health and social care services. We ensure that everyone who comes into contact with us feels welcomed, supported, safe and valued.

Please outline how you feel your organisation aligns with these values?

**Additional Services**

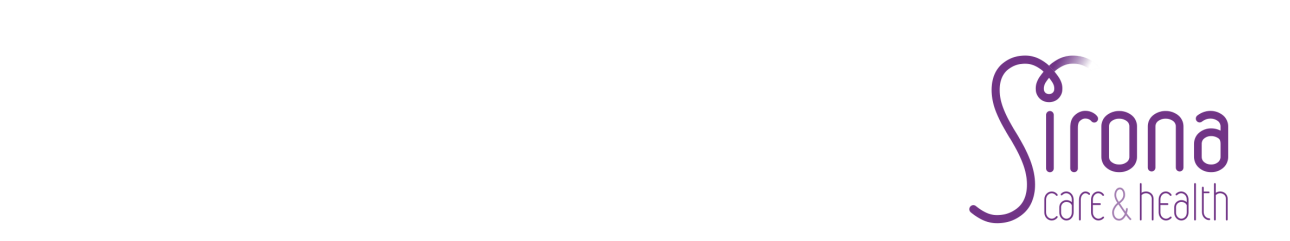
1. Please provide the details of any other services not detailed in the specification that you are able to provide to Sirona care & health

**References:**

Please provide a name and contact details of a client that has previously used your services for similar purposes as those outlined in the specification.

*Please ask for the client’s consent prior to disclosing this information.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |

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**Pricing Schedule**

**Please complete parts A and B of this pricing schedule in full.**

The prices submitted at the time of tender must be fixed for a 3 year period (until 1st June

2021).

**Part A**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Estimated no per year (where available)** | | | **Cost per Service (£)** |
| **Service Type** |
| **A) / B) Pre-employment** | | | | |
| Screening | 400-450 | | |  |
| Medical Examinations | 55 - 60 | | |  |
| **C) / D) / E) Medical referrals and ill-health retirement** | | | | |
| Medical Examinations (face to face) | 60 - 80 | | |  |
| Telephone triage | Volumes unknown | | |  |
| Home Visits | Less than 5 | | |  |
| Case Conferences | Volumes unknown | | |  |
| Workplace/environmental assessments | Less than 20 | | |  |
| Night worker evaluations | Volumes unknown | | |  |
| Stress risk assessment | Volumes unknown | | |  |
| Onward referrals | Volumes unknown | | |  |
| Ill-health retirement medical examinations (face to face) | Less than 10 | | |  |
| Ill-health retirement administration | Less than 10 | | |  |
| **F) Employee Assistance Programme (EAP)** | | | | |
| Telephone triage | Volumes unknown | | |  |
| Counselling | 30 - 40 | | |  |
| **G) Immunisations and Vaccinations.** | | | | |
| **Please outline the immunisations and vaccinations required under each staff group for pre-employments and existing staff.** | | | | |
| Pre- employment | Admin and Clerical – 15 | | |  |
| *Insert text* | | |
| Allied Health Porfessionals - 65 | | |  |
| *Insert text* | | |
| Ancillary - 30 | | |  |
| *Insert text* | | |
| Doctors – 10 | | |  |
| *Insert text* | | |
| Nurses - 150 | | |  |
| *Insert text* | | |
| Support workers – 110 | | |  |
| *Insert text* | | |
| **Existing staff** | Admin and Clerical – 385 | | |  |
| *Insert text* | | |  |
| Allied Health Porfessionals - 190 | | |  |
| *Insert text* | | |  |
| Ancillary - 85 | | |  |
| *Insert text* | | |
| Doctors – 50 | | |  |
| *Insert text* | | |
| Nurses - 450 | | |  |
| *Insert text* | | |
| Support workers – 560  *Insert text* | | |  |
|  | | |
| **H) Other Services** |  |  |  |  |
| **Please outline the cost of any other services which are not outlined above and will incur an additional cost** | | | | |
| *Insert text* | | | |  |
| *Insert text* | | | |  |
| *Insert text* | | | |  |
| *Insert text* | | | |  |
|  | | | |  |
| **Please provide details of any of the above services or activities which would be vatable:** | | | | |
|  | | | | |
|
|
|
|

**Part B**

Please provide a per head price for all of the services listed in the service specification, in line with the estimated volumes indicated above. Please see section 1 and the information in part A) of the pricing schedule for more details of our staffing lists.

Please note that this price should include any VAT charges on the above services, where applicable.

**£………**

Would this change if our headcount increased by an additional 100 employees per year? If so, please provide details below:

**………………………………………………………………………………………………..**

**………………………………………………………………………………………………..**

**………………………………………………………………………………………………..**