

**Document A (1) – Document Collaboration Request for Proposal (RFP)**

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Dear Supplier,

**REQUEST FOR a PROPOSAL FOR A DOCUMENT COLLABORATION SYSTEM**

You are invited by The Royal College of Anaesthetists (RCoA) to submit a proposal for the provision of services detailed in the attached documentation. Your proposal must be received by **16.00 on** **Thursday 12th April** via the [tsp@rcoa.ac.uk](mailto:tsp@rcoa.ac.uk) email account. It is the responsibility of all Prospective Suppliers to ensure that their proposal is received no later than the appointed time. RCoA may undertake not to consider proposals received after that time.

Your proposal will form part of the terms and conditions for the provision of services which will apply once we have agreed a contract with you.

Following the evaluation process, the intention is to arrive at a short list of the top ranked Prospective Suppliers (two to four in number), for the presentation stage. This will include:

* A presentation/mock up (**between Monday 30th April and Friday 4th May**) session to present their proposal and respond to questions from the RCoA evaluation panel. This meeting will provide the panel with the opportunity to address any unclear aspects of the Prospective Supplier’s response. The supplier should also provide a mock up of how our document collaboration system could look, we want to see how the system can be configured to be simple, user friendly and internally branded.

RCoA reserves the right to discount proposals that are incomplete or not completed to sufficient quality. Suppliers excluded before the presentation round will not receive feedback. RCoA reserves the right to moderate scores in-line with clarification responses and the presentation stage. RCoA is not a contracting authority for the purposes of EU public procurement regime as implemented by the Public Contracts Regulations 2015 (as amended).

Best wishes,

Katie Edmondson, Project Manager  
  
Technology Strategy Programme  
The Royal College of Anaesthetists  
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London WC1R 4SG

## The Royal College of Anaesthetists (RCoA)

Anaesthesia is the largest single hospital medical specialty in the NHS. The Royal College of Anaesthetists is the professional body responsible for the specialty throughout the UK, and it ensures the quality of patient care through the maintenance of standards in anaesthesia, critical care and pain medicine.

## Introduction

Multiple teams in the College work with different external partners on the development and approval of documents. There is not currently a College-wide system that enables this work so it is often a manual process with documents shared via a number of methods and feedback collated manually. The College is licenced for Office 365 and is looking for a partner to help configure and implement SharePoint Online as the organisations document collaboration system. We do not want to purchase a third party product based on SharePoint, we are looking for support configuring SharePoint Online as offered by Microsoft.

Implementation of SharePoint Online would reduce the amount of time taken to manage document collaboration and workflow with our members and fellows. It would also support remote working by enabling staff to input if they are working away from the office.

In scope

* Platform to share documents internally and externally securely in line with data protection/GDPR regulations
* Configurable permission levels
* Ability for multiple contributors to edit a document at once
* Workflow processes for review and approval of documents
* Version control for documents that are in development
* Audit trail of who has edited a document
* Ability to set format and word limits
* Task management including reminders/alerts for outstanding tasks
* Platform for sharing documents with Board/Committee groups.

RCoA are looking for a supplier that can deliver the key requirements using SharePoint Online and has a flexible user model which recognises the distinction between core and “ad hoc” users. Additionally we are looking for a supplier to become a longer term partner to help us maximise the value of the solution over time, by extending it to other areas of use, integrating with other systems and adding features to keep up with developments in the technology used to support communications.

## Award and contract

The service will be provided at the costs set down within the pricing schedule to the contract.

The scope of this contract is for the set up and implementation of SharePoint Online and early post-implementation life support.

We are also interested in what support you can provide on SharePoint and Office 365 as a whole. Please detail if this is something you can provide in Question 2 of **Document A(2)** **RFP Supplier Response** and provide details of support day rates in the **Document C -** **Pricing Schedule**. This is provided for information and is not scored as part of this tender.

There will be review points at key and agreed milestones of the contract to review progress and plan future work and depending on positive outcomes from these then the chosen provider will be assured of this work, should it be decided as necessary by RCoA.

The contract will cover dispute resolution mechanisms, change control process, liability, performance, implementation and configuration of the system.

RCoA is not bound to accept the lowest priced or any proposal and shall not be bound to accept the supplier as sole supplier. For the avoidance of doubt, RCoA reserves the right to award this contract in part, in parts, as a whole or not at all should circumstances be deemed necessary unless the Prospective Supplier expressly stipulates otherwise on the response.

Prices quoted shall remain firm for the duration of the contract and be exclusive of Value Added Tax (VAT). VAT should be shown separately.

## Proposed procurement timetable

|  |  |  |
| --- | --- | --- |
| **Activity** | **Estimated start** | **Estimated finish** |
| Request for proposal (RFP) window | 23rd March 2018 | 12th April 2018 |
| Evaluate proposals and shortlisting | 13th April 2018 | 20th April 2018 |
| Supplier presentations | 30th April 2018 | 4th May 2018 |
| Contract award and finalisation | 21st May 2018 | TBC |

## General solution requirements and scope

### Objectives

* To improve the ability of the RCoA to share and co-produce documents with stakeholders based in different locations.
* To share information securely internally and externally in compliance with GDPR.
* To stop manual collation of feedback as the system provides “one version of the truth”.

### Outcomes and capabilities

* Excellent user experience, flexibility of administration and added value/efficiency.
* Cost effective, stable and secure collaboration system.
* Improved internal and external communications with a trusted system.
* Accessible internally within RCoA and externally.

### Outputs

* New document collaboration system that includes document collaboration, workflow and task management functionality.
* Accessible and intuitive design (User Interface/User Experience).
* Compatible with Mac and PC operating systems.
* Supported for use on mobile devices.
* Set up of initial users and easy process for set up of future users.
* Training and documentation.
* Flexible administration (to enable administrators to complete tasks using specific permissions according to their roles within the system and the organisation).
* Provision of off the shelf connectors to integrate with document production applications and an open API for potential future extensions.
* Integration with Single Sign on (SSO).
* High data security and ability for encryption.
* Resilient platform stability.

### Out of scope

The development or implementation of:

* Replacement of current shared drives or document storage folders.
* Document capture e.g. optical character recognition

## Key project phases and milestones

Based on the project plan at the time of writing the provisional key project phases are:

|  |  |  |
| --- | --- | --- |
| **Phase and stage** | **Start** | **Finish** |
| **Discovery** |  |  |
| Initiation process | November 2017 | December 2017 |
| Stage 1 (Requirements analysis) | January 2018 | March 2018 |
| Stage 2 (Procurement) | March 2018 | June 2018 |
| **Implementation** |  |  |
| Set up and Testing | June 2018 | August 2018 |
| Training | August 2018 | September 2018 |
| **Live** |  |  |
| Initial go live | August 2018 | September 2018 |

## Account implementation and management

For successful implementation of the solution and service, RCoA requires a named contact responsible for managing the implementation process, and a flexible integration plan. RCoA will make a dedicated local Project Manager available for the course of the project.

## Format and assessment of proposals

* 1. The completed documents that must be submitted to form your tender response are listed below. Please ensure that information provided as part of the response is succinct and of sufficient quality and detail so that an informed assessment of it can be made. Where word limits are expected, these are stated in relevant sections.
* Document A (1) - Request for Proposal (RFP) Information
* Document A (2) – Request for Proposal (RFP) Supplier Response
* Document B - Requirements
  + Functional
  + Non-functional
* Document C - Pricing Matrix
  1. Do not submit any additional supporting documentation with your RFP response except where specifically requested to do so as part of this RFP. Adobe PDF, Word, Project and Excel formats can be used for any additional supporting documentation.
  2. All attachments/supporting documentation should be provided separately to your main tender response and clearly labelled to make it clear as to which part of your tender response it relates.
  3. Responses from Prospective Suppliers will be assessed to determine the most value for money proposal using the following criteria and weightings and will be assessed on your response submitted and (if applicable) other aspects i.e. presentations and prototyping:

|  |  |
| --- | --- |
| **Section** | **Potential of total score** |
| Technical merit and functional fit | 70% |
| Cultural fit | 10% |
| Price | 20% |
| Declaration and acceptance | **Pass/Fail** |
| **Total** | **100%** |

* 1. The weightings are further broken down as follows:

| **Section** | **Evaluation method** | **Section weighting** | **Potential of total score** |
| --- | --- | --- | --- |
| **Technical merit and functional fit** |  |  |  |
| Method statement for system implementation | Scored | 40% |  |
| Method statement for system support | For information |  |  |
| Specific requirement responses |  |  |  |
| *Functional requirements* | Pass/Fail |  |  |
| *Non-Functional requirements* | Pass/Fail |  |  |
| Presentations and mock up | Scored | 60% |  |
| **Total Technical merit and functional fit** |  | **100%** | **70%** |
|  |  |  |  |
| **Cultural fit** |  |  |  |
| Organisational details | For information |  |  |
| Type of Organisation | For information |  |  |
| Sub-contractors and consortia | For information |  |  |
| Contact details and declaration | For information |  |  |
| Exclusion grounds | Pass/fail |  |  |
| Company information | For information |  |  |
| Commercial information | For information |  |  |
| Financial standing | Scored | 50% |  |
| Operations and experience | Scored | 50% |  |
| Quality assurance | For information |  |  |
| Environment | For information |  |  |
| Human resources | For information |  |  |
| **Total Cultural fit** |  | **100%** | **10%** |
|  |  |  |  |
| **Price** |  |  |  |
| Implementation cost | Scored | 100% |  |
| **Total Price** |  | **100%** | **20%** |
|  |  |  |  |
| Declaration and acceptance | Pass/fail |  |  |
|  |  |  |  |
| **Total** |  |  | **100%** |

* 1. For those Respondents that are compliant with the Pass/fail items (sections or requirements), an evaluation will be then made of each response that is Scored. A rating scale of 0-3 (as shown below) will be used for evaluating each response. Where the response does not address a requirement at all, this may result in the proposal being invalidated.

| **Grade label** | **Grade** | **Definition of grade** |
| --- | --- | --- |
| Not met or no evidence (fail) | 0 | The response has been omitted, or the proposal evidences inadequate (or insufficient) delivery of the requirement. |
| Partially met (pass) | 1 | The proposal has merit, although there is weakness (or inconsistency) as to the full satisfaction of the requirement. |
| Met (pass) | 2 | The proposal has a suitable level of detail to assure that a satisfactory delivery of the requirement is likely. |
| Exceeded (pass) | 3 | The proposal has evidenced significant levels of understanding that assures there will be desirable value-add within the proposal **or** superior and desirable (time or quality) delivery outcomes. |

* 1. Prospective Suppliers are also required to complete a number of additional ‘For Information’ questions as part of the response. We have kept this to a minimum and whilst these questions are not scored, they allow RCoA to gather information about the Prospective Supplier. Any Prospective Supplier may be excluded from the process at any stage if any of those representations are found to be untrue, misleading or are materially inaccurate.
  2. Prospective Suppliers are required to complete a number of ‘Pass/fail’ questions as part of their response. These questions ensure that RCoA’s minimum requirements are met by Prospective Suppliers. Any response deemed a fail on these questions may result in the supplier’s response not being evaluated further.
  3. The general requirements are listed in **Document A (2) - Request for Proposal (RFP)**. Clearly state, together with reasons, if a section is not applicable to you.
  4. The specific requirements are listed in **Document B – Requirements** in two worksheets. Both the Functional and Non-Functional requirements are separated into Primary, Secondary and Tertiary requirements. A response is only required where a requirement cannot be met.
  5. Primary requirements are all core requirements. Prospective Suppliers who cannot meet these core requirements may fail this requirement and their response will not be assessed further. Secondary and Tertiary will be considered but are not essential.
  6. Prospective Suppliers must submit pricing costs for Implementation in **Document C - Pricing Matrix.**
  7. The lowest qualified proposal cost will receive the maximum percentage score available. Proposals that are more expensive will be given a lower percentage score using the standard deviation from the lowest cost. Scores will be calculated to two decimal places.
  8. Day rates should be inclusive of all expenses incurred by the supplier. A day is understood as 7 hours of work.
  9. RCoA shall have the right to disqualify your Proposal if you fail to complete the relevant parts (in full or part) as required by this document. RCoA shall also have the right to disqualify your proposal at any stage in the process if it becomes aware of any omission or misrepresentation in your response to any question.
  10. All Responses must be in English.

## Assumptions for pricing

RCoA anticipates a user base of:

* 100 core staff users split across 15 teams who will require full functionality (within this group approximately 20 will need to be administrators of a work space).
* 400+ members and fellows who need to be able to view, edit and upload documents. We expect this functionality to be covered within the unlicensed user functionality available in SharePoint Online. If this is not the case please indicate any licence costs in **Document C - Pricing Matrix.**

The College already has O365 Education E3 for Faculty licences for all staff, please take this into account in your pricing. The branding will be a single format and consistent across the different workspaces with simple and generic workspace templates.

## Next Steps

Please complete your response in:

* Document A (2) - RFP Supplier Response
* Document B - Requirements
* Document C – Pricing Matrix

Responses should be sent electronically to [tsp@rcoa.ac.uk](mailto:tsp@rcoa.ac.uk)by **16.00 on** **Thursday 12th April** .

Please note that we can only answer queries relating to the proposal documents and cannot provide any information or help in relation to the content of the Prospective Suppliers submission. Answers to specific queries and advice given will be made available to all Prospective Suppliers.

You may submit, by no later than four (4) days prior to the closing date any queries that you have relating to this Proposal. Please submit such queries to [tsp@rcoa.ac.uk](mailto:tsp@rcoa.ac.uk).

Any queries should clearly reference the appropriate paragraph/section in the documentation and, to the extent possible, should be aggregated rather than sent individually. As far as is reasonably possible, RCoA will respond to all reasonable requests for clarification of any aspect of this Proposal and supporting documents, if made before the above deadline. RCoA will aim to provide its response within two working days and no later than two days prior to the closing date. No queries received after the above deadline will be answered.