**NHS DIGITAL**

**PRJ\_1826**

**INVITATION TO TENDER AND INSTRUCTIONS TO TENDERERS**

**Workforce Cyber Security Campaign Design**

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# Introduction

This procurement is a further competition under Lot 6 of the Crown Commercial Service Communication Services Framework (RM3796).

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 cover the campaign design as set out in the statement of requirements. The Letter of Appointment and Call-Off Agreement terms and conditions shall apply.

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.

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| **ACTIVITY** | **DATE & TIME** |
| Clarification question deadline | 10am, 29 January 2019 |
| Tender response deadline | 10am, 4 February 2019 |
| Evaluation/Moderation – Stage 1 | 7 February 2019  |
| Presentations  | 14 February 2019 |
| Evaluation/Moderation – Stage 2  | 15 February 2019  |
| Approval to award  | 18 February 2019 |
| Notification of intention to award | 18 February 2019 |
| Standstill period starts | 19 February 2019 |
| Standstill period ends | Midnight, 1 March 2019 |
| Award | 4 March 2019  |
| Signed Call-Off Agreement/commencement date | 4 March 2019 |

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# 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 into 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 this requirement.
* 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 90 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.
* NHS Digital intends to comply with its transparency requirements by, following the award of the Contract ( if the contract is awarded), promptly publishing details of the Contract on Contracts Finder and such details will include as a minimum: who has won the contract, the contract value, and (for procurments below the EU thresholds) indicate whether the winning supplier is a small business, voluntary organisation or charity.
* No discussion, canvassing or soliciting of NHS Digital's staff should takes place, which may be deemed to have a bearing on the construction of a Tender response.
* All information supplied by NHS Digital to you must be treated in confidence and not disclosed to third parties except insofar as this is necessary to obtain sureties or quotations for submitting the Tender. All information supplied by you to NHS Digital will similarly be treated in confidence except for the disclosure of such information with regard to the outcome of the procurement process.
* NHS Digital may share information with NHS England and the Department of Health (as may be relevant), and with central government organisations as may be required in accordance with its functions.

# 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 written tender responses will take place in three separate stages:

* Qualification envelope (pass/fail)
* Technical envelope (overall weighting 80%)
* Commercial envelope (overall weighting 20%)

# 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 – Stage 1 (Weighting 70% of 80% available)**

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 stage 1.

**Commercial Envelope**

The commercial envelope will not be opened until the technical envelope evaluation Stage 1 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 into Bravo.

The commercial envelope score will be added to the technical envelope stage 1 score to determine the total weighted score for each surviving tender response.

**Technial Evaluation Stage 2**

Following the evaluation of Stage 1 the top scoring four agencies will be invited to present for the business. The agency’s presentation team must include the key people that will be working on the contract. These presentations will take place on Thursday 14th February 2019. **Please note being able to present on this day is a mandatory requirement.**

The evaluation criteria for the presentations (stage two) will be confirmed to agencies prior to the date they take place and will be scored based on the remaining 10% of the Technical Envelope Weighting.

Presentations will be held at **NHS Digital, Vantage House, 40 Aire Street, Leeds, LS1 4HT**

**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 all the questions contained within the qualification envelope. These are generally yes/no confirm/can’t confirm and some which ask for information about your organisation.

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 **80%.**

Each technical envelope question to be evalated 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:-

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| **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 requirements to an acceptable standard. | 50 |
| Good | The proposed approach demonstrates a good understanding of NHS Digital service requirements and objectives with good supporting evidence. It demonstrates a good understanding of the campaign requirements. | 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 requirements and deliver a successful campaign. | 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.

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| **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 your response to each one.

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| **Presentations** | **Weight: 10%** |
| **Question**Stage 1 – Please confirm that the team who will deliver the Campaign are available to present to the evaluation panel on Thursday 14th February at NHS Digital, Vantage House, 40 Aire Street, Leeds, LS1 4HT. |
| **Response Guidance**This is a mandatory requirement and only suppliers who pass this question will be taken forwards. Should you fail this question then you will be automatically excluded from this further competition. Suppliers shortlisted through to Stage 2 will, on shortlisting, be provided with details for the contents of their presentation. The Presentation will then carry the 10% weighting score.  |

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| **Campaign concepts** | **Weight: 50%** |
| **Question**Please provide two different design concepts for the communication toolkit which meet the requirements of the project brief (section 5) of the design brief document. Please describe and detail the rationale behind the concepts and how they will be used to deliver this brief. |
| **Response Guidance**Your response must clearly demonstrate how the campaign will: 1. Raise awareness with NHS staff of the direct impact of cyber/data security on patient safety/care and encourage them to take action to mitigate these threats. Please refer to the market research summary in Annex 2 for supporting information.
2. Help embed a culture of cyber security throughout the NHS.
3. Motivate NHS staff to adopt basic cyber security practices.
4. Be clear and easy to understand by all staff groups.

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 written response to this question is limited to four pages. A page is defined as one side of A4, font size Arial 11pt, single line spacing and minimum margin width of 2cm. Please supply any visuals of the design concepts as an annex to this section of the tender document. Should you wish to provide examples of your previous work on other campaigns as part of your response please do so as an additional annex to this section of the tender.Anything in excess of the page limit will not be evaluated. |

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| **Campaign delivery**  | **Weight: 15%** |
| **Question** Please outline how you would manage the delivery of the campaign from the design of the concepts to the final versions ready for distribution. |
| **Response Guidance**Your response must clearly demonstrate: 1. An overview of the team which will be in place to complete the requirement, including their relevant knowledge and experience and roles and responsibilities for the project.
2. The methodology of the project, from designing the concepts to completion of the agreed designs, including any KPIs to evaluate the effectiveness of this strategy.
3. A timescale for completing the delivery from start to finish. This should include allowances for rounds of amendments as stated in the design brief document, as well as any agreed milestone dates and your ability to work flexibly and to tight deadlines.
4. How the concepts will be tested with NHS staff to ensure that the messages will be understood by a variety of workforce groups. Benchmarking staff understanding ahead of the campaign launch and after the campaign has run, as well as overall campaign evaluation

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 four 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. |

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| **Campaign materials**  | **Weight: 15%** |
| **Question** The toolkit must include a range of different communications materials. Please outline the different materials that would be provided and the formats in which these will be delivered. Please explain why you believe the chosen mediums will have the desired effect. |
| **Response Guidance**Your response must clearly demonstrate: 1. A list/short description of the types of materials available for use.
2. The formats which would be deemed most suitable to provide the toolkit materials.

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 three 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. |

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| **Brand guideline compliance** | **Weight: 10%** |
| **Question**The campaign must comply with and follow NHS Digital brand guidelines and adopt the overall NHS identity. Please confirm in your brief that the brand guidelines will be incorporated into the concepts. |
| **Response Guidance**Your response must clearly demonstrate: 1. Previous experience of conforming to brand guidelines of the NHS or other organisations.
2. Overview of how you will comply with and adopt the NHS Digital brand guidelines.

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 one page. 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

The commercial envelope has an overall weighting of **20%.**

The successful tenderer’s pricing proposal will be inserted at Schedule 6 (Commercial Schedule) of the contract document.

Section 3.1.1 of the Commercial Envelope contains a file for you to download and insert your pricing proposal. That file, once completed should be uploaded in Bravo as your response to Section 3.1.1.

Please refer to the document attached at 3.1.1 in the Commercial Envelope.

The total amount (total cost) should be entered at 3.1.2.

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:

Cost Score = n% \* (lowest price \* Scaler) - price

 (Scaler-1) \* 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.