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Tender

NHS 24 Contact Centre Customer Relationship Management System

NHS 24

F02: Contract notice

Notice identifier: 2023/S 000-036209

Procurement identifier (OCID): ocds-h6vhtk-03fb63

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Section I: Contracting authority

I.1) Name and addresses

NHS 24

Lumina Building, NHS 24, 40 Ainslie Road, Hillington

Glasgow

G52 4RU

Contact

George Futcher

Email

george.futcher@nhs.scot

Country

United Kingdom

NUTS code

UKM - Scotland

Internet address(es)

Main address

www.nhs24.com

Buyer's address

https://www.publiccontractsscotland.gov.uk/search/Search_AuthProfile.aspx?ID=AA00230

I.3) Communication

Access to the procurement documents is restricted. Further information can be obtained at

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.publictendersscotland.publiccontractsscotland.gov.uk/>

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Health

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

NHS 24 Contact Centre Customer Relationship Management System

Reference number

NHS24/2023/755.

II.1.2) Main CPV code

- 72000000 - IT services: consulting, software development, Internet and support

II.1.3) Type of contract

Services

II.1.4) Short description

The NHS 24 Digital Transformation Programme is exploring options for replacement of several of the information technology solutions used to deliver services to patients in Scotland. This document and procurement process are focused on finding solutions for an integrated Contact Centre (CC) and Customer Relationship Management (CRM) solution. These are the two main systems NHS 24 uses to interact directly with people who have urgent medical needs and are essential for us to effectively triage them safely .

II.1.5) Estimated total value

Value excluding VAT: £28,000,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 48000000 - Software package and information systems

- 79512000 - Call centre
- 48517000 - IT software package
- 48510000 - Communication software package
- 48613000 - Electronic data management (EDM)
- 48610000 - Database systems
- 48600000 - Database and operating software package
- 48810000 - Information systems
- 48811000 - E-mail system
- 72317000 - Data storage services
- 72310000 - Data-processing services
- 72416000 - Application service providers
- 48921000 - Automation system
- 80500000 - Training services
- 45100000 - Site preparation work

II.2.3) Place of performance

NUTS codes

- UKM - Scotland

Main site or place of performance

Scotland

II.2.4) Description of the procurement

NHS 24 is exploring options for replacement information technology solutions to deliver functionality of IT systems generically known as Customer Relationship Management (CRM) and Contact Centre.

NHS 24 wishes to award a contract with a suitably qualified supplier to provide an integrated Contact Centre and CRM system. This would be a contract for 5 years plus 2 year extension for a user friendly integrated system provided as software as service and cloud hosted. This would include:

- Technical platform implementation, maintenance, and support
- Customisation of workflows and process automations
- OMNI-channel ready, including high availability/high resilience.
- Availability of 'Out-of-the-box' Management Information and Business Intelligence
- Integration with other systems both internal and external (including Business Intelligence, Predictive Analytics and Workforce Management).

NHS 24 are interested in hearing from suppliers who can deliver a fully functioning integrated Contact Centre (CC) and Customer Relationship Management (CRM) solution. The intention is that the solution will be implemented by September 2025. It is important that the contract, solution and supplier support NHS 24 to provide safe digital services that connect the people of Scotland to the care they need. This includes supporting innovation throughout the duration of the contract, so that we offer choice and convenience to people seeking healthcare advice.

Our mission is to provide the right care at the right place, 24/7. There are around 2m calls to NHS 24 each year and over 100m page views on the NHS Inform website. Through this contract award there is the opportunity to enhance our digital services with a modern multi-channel approach. High availability, so the people of Scotland can have confidence to reach us, all day every day, and increased flexibility to allow us to respond to the needs of people seeking healthcare advice (for example that IVR options can be changed by NHS 24 to reflect live service pressures or people can interact while on the IVR) are key considerations.

Potential bidders are encouraged to attend an event on Friday 15th December 2023 – 9:30 to 1pm where presentations from NHS 24 will supplement the information in the bidders pack with the aim of providing useful information about NHS 24 and the procurement. This will be held via Teams and if you wish to attend, please provide an e-mail address and contact details via the Message Board in PCS-Tender, and you will then receive an invite next week to join the event.

II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.6) Estimated value

Value excluding VAT: £28,000,000

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

60

This contract is subject to renewal

Yes

Description of renewals

The Contact Centre Customer Relationship Management System contract will be for an initial period of 5 years with a subsequent optional extension of 2 years

II.2.9) Information about the limits on the number of candidates to be invited

Envisaged number of candidates: 4

Objective criteria for choosing the limited number of candidates:

Owing to character limitations in the Contract Notice not all criteria and information relating to this procurement can be included in this notice. The Objective and Non-Discriminatory Criteria are set out in full in the SPD Instructions which can be accessed through the website referenced in section I.3. The SPD selection process will be carried out in 3 stages:

Stage One: Compliance Check and Exclusion Grounds (Mandatory and Discretionary)

(Pass/Fail) – that the Bidder has submitted a complete and compliant SPD response; and whether any of the Bidder's, consortium members and/or reliance entities (if any) are in breach of the mandatory grounds for exclusion or, in the case of the discretionary exclusion grounds, are considered ineligible at the discretion of NHS 24, in accordance with Part III of the SPD and Regulation 58 of the Regulations.

Stage Two: Selection Criteria - Minimum Requirements (Pass/Fail) - that the Bidder meets the requisite economic and financial standing selection criteria deemed appropriate for the Project set out in Part 4 of the SPD Instructions; and meets the technical and professional ability selection criteria set out in Part 4 of the SPD Instructions.

Stage Three: Down Selection: Bidders who pass Stage One and Stage Two will have their SPD response scored in accordance with the Down Selection Criteria. The Down Selection Criteria are set out in Part 4 of the SPD Instructions. The Down Selection Criteria will be applied to all Bidders that pass Stage 1 and Stage 2 to reduce the number of Bidders that are invited to negotiate.

It is the intention of NHS 24 that four Bidders achieving the highest scores will be invited to negotiate but in the event of a tie for fourth place, all fourth placed Bidders will be invited to negotiate.

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: No

II.2.13) Information about European Union Funds

The procurement is related to a project and/or programme financed by European Union funds: No

Section III. Legal, economic, financial and technical information

III.1) Conditions for participation

III.1.2) Economic and financial standing

List and brief description of selection criteria

Full details can be found in the SPD and the SPD Instructions which can be accessed through the website referenced in section I.3 of this Contract Notice.

Bidders should note that Reliance Entities for the purpose of financial and economic standing will be required to enter into a parent company guarantee in the form required by NHS 24.

Minimum level(s) of standards possibly required

(4B1.2) SPD Statement:

Bidders will be required to have an average yearly turnover of a minimum of 5 million GBP for the last 3 years. The average yearly turnover of the economic operator in respect of its most recent three full financial years must have been equal to or more than 5 million GBP per annum. Where, for any valid reason, the Bidder does not have 3 years' audited financial statements available, NHS 24 may accept other forms of documentation which it considers acceptable as proof.

(4B.4) SPD Statement:

Net Assets must be a minimum of 5 Million GBP.

Basis of calculation: Net assets shall be calculated as at the date of the most recently published audited financial statements and should be based upon the financial position reflected therein. The calculation of net assets shall be based on tangible net assets only and shall therefore not include intangible assets such as goodwill and intellectual property.

Net Current Assets must be a minimum of 1 Million GBP.

Basis of calculation: Net current assets shall be calculated as at the date of the most recently published audited financial statements and should be based upon the financial position therein. The calculation shall be based on Current Assets less Current Liabilities.

(4B.5) SPD Statement

(4B.5.1a) The Bidder must confirm that they have or can commit to obtain the following level of required insurance:

Professional Risk Indemnity Insurance with cover (for a single event or series of related events in a single calendar year) for no less than 10 million GBP for a single calendar year.

(4B.5.1b) Unless the Bidder's business is exempt, the Bidder must confirm that they have or can commit to obtain the following level of required insurance:

Employer's (Compulsory Liability) Insurance with cover for no less than 5 million GBP.

If the Bidder's business is exempt, they shall provide the relevant documentation evidencing its exemption.

(4B.5.2) The Bidder must confirm that they have or can commit to obtain the following levels of required insurance:

- Cyber insurance cover for no less than 10 million GBP (for a single event or series of relates events in a calendar year);
- Public liability insurance cover for no less than 10 million GBP (for a single event or series of relates events in a calendar year);
- Product liability insurance cover for no less than 10 million GBP; and
- Product liability insurance cover that is not less than the sum of 1 million GBP in respect of any one incident.

(4B.6) SPD Statement:

There are no material post balance sheet events or significant business issues disclosed under 4B.6 giving rise to material concerns that the Bidder possesses the necessary economic and financial capacity to perform the contract.

III.1.3) Technical and professional ability

List and brief description of selection criteria

Full details can be found in the SPD and the SPD Instructions which can be accessed through the website referenced in section I.3 of this Contract Notice.

(4C.1.2) For full information on the requirement for 4C.1.2, please refer to the Additional Information/Selection Criteria column and Scoring Matrix/Weighting column of SPD ref. 4C.1.2 within the document titled NHS 24 - SPD Instructions - CRM and CC and section

III.1.3 of the Contract Notice.

Where the Bidder is relying on the technical experience of a Consortium Member or Reliance Entity to meet the requirements of the Selection Criteria and/or Down Selection Criteria, the experience relied on must be consistent with the Consortium Member's or Reliance Entity's role under this Project.

The Selection Criteria and Down Selection Criteria will evaluate Bidders on the basis of:

1. Experience of providing a cloud, SAAS based contract for integrated CRM and CC systems
2. Experience using decision support software within a CRM
3. Experience working with a client to maximise self-management and increase the speed of introduction of changes during a CRM and CC contract, to improve the staff and customer experience
4. Experience of ensuring data and cyber security
5. Experience of training staff on the use of a new CRM and CC system
6. Experience implementing a CRM and CC system and helping a client transition from another system onto a new system
7. Experience of setting up testing and training environments to allow for new system developments to be tried before implementation
8. Experience of reporting from the system both for regular day / week / monthly reporting but also ad hoc interrogations
9. Experience of integration with other CRM and CC systems
10. Experience of working with a client to ensure their front-end CRM user experience maximised a single click ethos and compliance with processes.

(4C.4) The Bidder has provided a statement of the relevant supply chain management and/or tracking systems used and confirmed in that statement that:

- they have (or have access to) the relevant supply chain management and tracking systems to ensure a resilient and sustainable supply chain;
- they have the systems in place to pay subcontractors through the supply chain

promptly and effectively: and provide evidence of:

a) their standard payment terms

b) $\geq 95\%$ of all supply chain invoices being paid on time (in accordance with the terms of contract) in the last financial year.

If the Bidder is unable to confirm (b) they must provide an improvement plan, signed by their Director to improve the payment performance.

(4C.7) Bidders are required to demonstrate knowledge of the climate emergency and the impact of their organisation, including their organisation's own scope 1 and 2 emissions. Accepted evidence includes but is not limited to:

A completed copy of the Bidder 'priority contract' Climate Change Plan Template in Appendix 2, including the bidder's calculated scope 1 and 2 carbon emissions and their planned projects and actions to reduce their carbon emissions.

(4C.8.1) The Bidder must provide details of the average annual manpower for the last three years.

(4C.8.2) The Bidder must provide details of the number of managerial staff for the last three years. Please separate the number and year separately.

(4C.10) The Bidder must provide details of the proportion (i.e. percentage) of the contract that it intends to subcontract.

III.2) Conditions related to the contract

III.2.2) Contract performance conditions

The SPD requires Bidders to provide details of Consortium Members (if any) in question 2A.17 (including specifying the lead organisation at 2A.17.1) and any other entities whose capacities they may be relying on to meet the selection criteria or down selection criteria in Parts 4 and/or 5 of the SPD. This may be technical or financial reliance.

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Competitive procedure with negotiation

IV.1.4) Information about reduction of the number of solutions or tenders during negotiation or dialogue

Recourse to staged procedure to gradually reduce the number of solutions to be discussed or tenders to be negotiated

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.1) Previous publication concerning this procedure

Notice number: [2023/S 000-026695](#)

IV.2.2) Time limit for receipt of tenders or requests to participate

Date

17 January 2024

Local time

12:00pm

IV.2.3) Estimated date of dispatch of invitations to tender or to participate to selected candidates

26 February 2024

IV.2.4) Languages in which tenders or requests to participate may be submitted

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Duration in months: 9 (from the date stated for receipt of tender)

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.2) Information about electronic workflows

Electronic invoicing will be accepted

VI.3) Additional information

For full information on the requirement for 4A.2, please refer to the Additional Information/Selection Criteria column of SPD ref. 4D.1 within the document titled NHS 24 - SPD Instructions - CRM and CC.

For full information on the requirement for 4D.1, please refer to the Additional Information/Selection Criteria column of SPD ref. 4D.1 within the document titled NHS 24 - SPD Instructions - CRM and CC

For full information on the requirement for 4D.2, please refer to the Additional Information/Selection Criteria column of SPD ref. 4D.2 within the document titled NHS 24 - SPD Instructions - CRM and CC.

Bidders should note the requirements in relation to Consortium Members or Reliance Entities specified within the SPD Instructions.

All dates, timescales and values set out in this notice and the procurement documents are estimates only and therefore subject to change during the tender process, if required.

The buyer is using PCS-Tender to conduct this PQQ exercise. The Project code is 25774. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2343>

A sub-contract clause has been included in this contract. For more information see:

<http://www.publiccontractsscotland.gov.uk/info/InfoCentre.aspx?ID=2363>

Community benefits are included in this requirement. For more information see:

<https://www.gov.scot/policies/public-sector-procurement/community-benefits-in-procurement/>

A summary of the expected community benefits has been provided as follows:

All Bidders must agree to support the concept, provision and ongoing development of community benefits provision in relation to this

Agreement. Bidders are required to provide a brief summary of the community benefits that have recently been delivered within Scotland,

and also what impact and outcomes these have achieved. Bidders are also required to summarise any community/social benefits that will be

delivered as part of this Agreement if successful, or, alternatively, confirm that they will engage with the NHS Scotland Community

Benefits Gateway (CBG).

All Bidders must provide evidence of how they will commit to fair work practices for workers (including any agency or sub-contractor

workers) engaged in the delivery of this contract.

(SC Ref:752666)

VI.4) Procedures for review

VI.4.1) Review body

Glasgow Sheriff Court

1 Carlton Place

Glasgow

G5 9DA

Email

glasgow@scotcourts.gov.uk

Country

United Kingdom

VI.4.3) Review procedure

Precise information on deadline(s) for review procedures

Economic operators should approach the contracting authority in the first instance.

However, the only formal remedy is to apply to the courts:

An economic operator that suffers, or is at risk of suffering, loss or damage attributable to a breach of duty under the Public Contracts (Scotland) Regulations 2015 or the Procurement Reform (Scotland) Act 2014, may bring proceedings in the Sheriff Court or the Court of Session.