To: **Executive Sub Committee**

On: **22 November 2019**

**Report
by
Director Scotland Excel**

Tender: **The Supply of Social Care Case Management Solutions Software (including Installation and Maintenance)**

Schedule: **0519**

Period: **20th November 2019 – 19th November 2023**

1.   Introduction and Background

This recommendation is for the award of Scotland Excel's collaborative framework for the Supply of a Social Care Case Management Solutions Software (including Installation & Maintenance) which will operate from 1st January 2020 until 19th November 2023.

The project to consider a collaborative approach to procuring a renewed Social Care Case Management system was identified by the Local Government Digital Office in 2017, primarily in response to the status of the current system used by Councils, which will no longer be supported. Scotland Excel undertook to determine the level of Council interest in collaboration relating to provision of a replacement Social Care Case Management System.

The requirement for this procurement has been identified through consultation with commodity User Intelligence Groups (UIGs). This presents an opportunity for Scotland Excel to provide a national collaborative solution which will drive value through the consolidation of spend, whilst alleviating the resource challenge associated with this type of procurement exercise for local authorities.

The framework was advertised at an estimated maximum value of £28 million over the four-year period, and this report summarises the outcome of the procurement process for the national framework agreement.

2.   Scope, Participation and Spend

As part of the strategy development, the User Intelligence Group (UIG) and technical panel approved an open procedure consisting of one lot for a Social Care Case Management Solution.

The framework will allow councils to call off directly or use a mini competition process if required.

Suppliers that are awarded onto the framework will be asked to support councils in securing approval by providing case studies of current customers and identifying efficiencies and service improvements to staff and clients that could be achieved with a new solution.

There is an awareness that social care systems used across Councils in Scotland may be considered as legacy or outdated from a technological perspective. Consequently, it is anticipated that a number of Councils would be able to use this framework as a route to market. All Councils are able to access the framework as advertised.

There are currently a number of councils that have established project teams to review current processes and procedures involved in social care service delivery. These councils anticipate that a new case management system will be an integral component to support and deliver improved ways of working.

During the evaluation process for this framework, six councils have expressed an interest with Scotland Excel with regard to timeline of delivery and intimated this may be their most likely route to market.

3. Procurement Process

A Prior Information Notice (PIN) was published on 11 October 2018 with 12 companies expressing an interest in the opportunity. Market engagement had previously taken place to provide an understanding of the marketplace as well as existing solution roadmaps.

The requirements specification was developed using a collaborative process with councils from small, medium and large authorities. A technical panel was formed, consisting of individuals from both IT and Social Services backgrounds.

To ensure maximum competition, an open tender process was used, and this was advertised on the Official Journal of the European Union and the Public Contracts Scotland portal on 04 July 2019. The tender process was conducted using the Public Contracts Scotland Tender (PCS-T) system.

The procurement process followed a two-stage tendering procedure. Stage one, Qualification, was conducted using the European Single Procurement Document (ESPD). Within the ESPD, service providers were required to answer a set of exclusionary questions along with providing details and/or acknowledgement of insurance, financial standing, quality management and health and safety policies and/or procedures.

At the second stage of the process, offers were evaluated against the undernoted criteria and weightings set against the framework lot.

Social care case management solutions.

Technical 70%
Commercial 30%

TR	Subject	Max Score
1	Case Management including Demonstration	10.00
2	Finance including Demonstrations (1,2,3)	9.00
3	Building Business Processes including System Admin Demonstration	9.00
4	Analytics including Demonstration	9.00
5	Notification/Alerts	3.00
6	Service Level Agreements	2.00
7	Diary Management	3.00
8	Portals	6.00
9	Groups (Family/Network) including Demonstration	4.00
10	Chronology	3.00
11	Case Notes	3.00
12	Genograms	3.00
13	Read Codes/SNOMED	1.00
14	Bed/Ward Management	2.00
15	Technical	6.00
16	Delivery	3.00
17	Mobile	5.00
18	Support	3.00
19	Supporting the System	3.00
20	Document management	3.00
21	Telecare	2.00
22	Implementation	3.00
23	Fair Work Practices/Community Benefits	5.00
	Total Marks Scored	**100.00**
	Technical Evaluation Score	**70.00**
	Commercial Evaluation Score	**30.00**

4. **Report on Offers Received**

The tender document was accessed by 33 organisations with 6 of those submitting an offer before the closing date.

A summary of offers received from service providers and their SME status is outlined within Appendix 1 of the report.

Following a full evaluation, scoring was completed, and Appendix 2 confirms the scoring achieved by each service provider.

5. **Recommendations**

Based on the evaluation undertaken, and in line with the criteria and weightings set out above, and to secure best value, capacity and coverage, it is recommended that a multi supplier framework is awarded to three suppliers as outlined in Appendix 2.

These three recommended suppliers offer nationwide coverage under the framework with all three being classed as SME status of medium.

These suppliers provide the solutions and services required by local authorities, most closely matching the specification of requirements published in the procurement documents as evaluated by the technical panel and they offer the most economically advantageous tenders in terms of the advertised award criteria.

6. **Benefits**

Savings

Benchmarking has not been possible within this procurement exercise as this is a first-generation framework, and Scotland Excel are unable to benchmark against current arrangements within Councils as contractual information is not fully known. This has also been further exacerbated by the different versions of systems involved, different customisations resulting in additional maintenance charging and the fact that some systems are currently developed by council ICT staff. As such, it is anticipated that a key benefit of this framework will be the ability to facilitate more effective like-for-like comparisons across Councils to enable savings identification and realisation.

Price Stability

The Social Care Case Management Solutions Software (including Installation & Maintenance), comprises a series of number of one-time services that include right to use licences, configuration, delivery, implementation, knowledge transfer and training. Annual recurring costs cover support and maintenance of the system including upgrades, patches and any appropriate bug fixes.

The commercial bid prices will be fixed for the four-year term of the framework.

7. **Sustainable Procurement Benefits**

<u>Community Benefits</u>

Service providers were asked to commit to the delivery of community benefit initiatives, per local authority, against pre-agreed spend threshold levels outlined within the community benefits method statement. The benefits aim to be reflective of the National Indicators outlined within the Scottish Government's National Performance framework, and their underlying vision and goals. Local authorities will accrue community benefit points based on their level of spend with a supplier. Accrued points correlate to a benefit that the local authority can elect to receive at any given point throughout the lifetime of the framework. All service providers have committed to delivering these benefits.

Within the published tender documents, service providers were given a list of indicative community benefits that could be agreed with local authorities. Examples of the indicative benefits which were conveyed to providers were:-

- Employability Workshop;
- Community Volunteering;
- Sponsorship
- Donation – Materials, labour or vouchers;
- Work Experience
- Recruitment -SME
- Recruitment - Apprentice.
- Recruitment - Graduate.
- Recruitment – Experienced Employee.

Scotland Excel will support delivery of these commitments during the lifetime of the framework and this will also be reported through ongoing contract management returns. Results reported on community benefits will be disseminated to councils on a bi-annual basis.

8. **Fair Work Practices including the Scottish Living Wage**

Service providers were also asked to confirm their approach to fair work practices and payment of the Scottish Living Wage – details of which can be found in Appendix 3. The below references living wage status of those recommended for award:-

- One is not an accredited Scottish Living Wage employer but currently pays above the Scottish Living Wage to all employees and commits to attaining accreditation over the initial two-year period of the framework;

- One is not an accredited Scottish Living Wage employer but pays above the Scottish Living Wage to all employees; and

- One is not accredited Scottish Living Wage employers but pays the Scottish Living Wage to all employees (except volunteers, apprentices and interns).

There has been no declaration of supported business status from any of the bidders, we will monitor this position throughout the lifespan of the framework.

Scotland Excel will continue to monitor fair work practices including the Scottish Living Wage status as part of the contract management process.

9. Contract Mobilisation and Management

Both service providers and participating member Councils will be issued with a mobilisation pack containing information relating to the operation of the framework, roles and responsibilities, management information requirements and community benefits commitments.

Scotland Excel will provide further support to councils interested in accessing the framework by assisting with supplier engagement and acting as a contact point for technical questions & queries.

In accordance with Scotland Excel's established contract and supplier management programme, this framework has been classified, as a level 3 arrangement in terms of both risk and spend. As such, Scotland Excel will review the framework with the service providers as appropriate, whilst monitoring management information and community benefits associated with this framework. Additionally, Scotland Excel will ensure that suppliers are aware of the wider Scottish Government Health & Social Care strategic direction and assist in the communication of supplier technical roadmap changes to councils.

10. Summary

This framework aims to maximise collaboration, consolidate demand and deliver best value. Softer benefits can be reported in relation to this procurement exercise such as reassurance to councils that a robust evaluation has been carried out, with service users being satisfied that this procurement and outcome will meet the requirements of councils in dealing with essential and sensitive information.

The Executive Sub Committee is requested to approve the recommendation to award this framework to the recommended service providers as detailed within Appendix 2.

Appendix 1 – Offers Received & Status

SERVICE PROVIDER	STATUS	LOCATION
Azeus UK Limited	Micro	London
CareWorks Limited	Medium	Dublin
Deloitte LLP	Large	London
Liquidlogic Ltd	Medium	Leeds
OLM Systems Limited	Medium	Teddington
Servelec Social Care Ltd (Trading as Servelec)	Medium	Sheffield

Appendix 2 - Scoring and Recommendations

Social Care Case Management Solutions (including support & maintenance)		
Service Provider	Score	Awarded
CareWorks Limited	95.18	Yes
Servelec Social Care Ltd (Trading as Servelec)	80.63	Yes
Liquidlogic Ltd	72.37	Yes
Azeus (UK) Limited	67.00	No
OLM Systems Limited	63.46	No
Deloitte LLP	56.54	No

Appendix 3 – Recommended Service Providers with Scottish Living Wage Status

Service Provider	Accredited	Currently progressing through Scottish Living Wage accreditation process	Pay Scottish Living Wage to all employees, and committed to gaining accreditation over the initial 2 years of framework	Pay Scottish Living Wage to all employees, but not accredited
CareWorks Limited			Yes	
Liquidlogic Ltd				Yes
Servelec Social Care Ltd (Trading as Servelec)				Yes