**Case Management Quality Criteria Document**

We believe that the quality of the case management system is very important and as such we will be attributing 70% of the overall score to quality with the remaining 30% for price.

The quality element of the scoring is explained below but essentially there will be two gateway questions, six written questions, a demonstration and four information only questions.

Gateway Questions:

These two questions will be pass or fail. Any bid that fails either or both of these questions will not have their bid considered further.

1. Does your proposed case management system comply with the specification, in particular, does it meet all essential requirements? **(Pass/Fail)**
2. Please provide a case study that demonstrates you have successfully provided a legal case management system. The case study must be backed up with a referee from said organisation who may be contacted to confirm the accuracy of the case study. **(1 side A4 paper maximum) (Pass/Fail)**

Questions: (50% of overall quality mark)

These written questions will be scored using the scoring matrix contained at the end of this document. The bids will then be ranked from top to bottom and up to the top 4 will be asked to provide a demonstration of their system.

We have set the Chest up so that there are locations for you to update the relevant answers. Each answer must be uploaded to the corresponding location on the Chest.

**Please do not simply upload the same document 6 times.**

How the proposed case management system looks, and feels is very much an integral part of the system and therefore we would expect to see diagrams/screenshots of the various screens in the answers to all the following questions.

1. **Interface** (20%)

Please describe the Interface of the proposed case management system ensuring to highlight the features and benefits. In doing so please ensure that you make reference to section 3.1 of the specification explaining how the proposed case management system will comply with the specification.

1. **Reporting** (15%)

Please describe the reporting capabilities of the proposed case management system and provide examples of what the reports will look like and the various types of report. In doing so please ensure that you make reference to section 3.2 of the specification explaining how the reporting capability of the proposed case management system will comply with the specification.

1. **Data Management** (15%)

With reference to section 3.3 of the specification please provide details of how the proposed case management system will aid and assist all staff to carry out their roles efficiently and effectively and how it complies with the specification.

1. **Workflows and Templates** (20%)

With reference to 3.4 of the specification please show us how the proposed case management system will comply with the specification. Please include in your answer details of who can create templates and workflows (user or super user) and how easy this is.

1. **Integration** (20%)

The idea is that users will be able to work from within the system therefore with reference to section 3.5 of the specification please explain how the proposed case management system will comply with the specification.

1. **Client Portal** (10%)

With reference to section 3.6 of the specification please explain how the proposed case management system will comply with the specification.

Demonstration (50% of overall quality mark)

As mentioned above, up to the top four bids, based on the answers to the written questions will be asked to demonstrate their system to the evaluators. This will hopefully take place via a Microsoft Teams meeting week commencing 26 October 2020 or as soon as possible thereafter. Bidders will be given one hour each for the demonstration.

Whilst the evaluators may ask the bidder to clarify a point or to go over something, they have mentioned there will be no formal questioning and it will be the responsibility of the bidder to show the system off to its full potential.

We will be looking to see that the system really does perform in the way it has been explained in the written answers paying particular attention to the essential criteria, the user friendliness and the ability to customise.

The demonstration will be given a score out of 10 using the scoring matrix at the bottom of this document.

Information only:

The answers to the following questions are essential for the contract so that both parties can understand their respective responsibilities, but they are not scored. However, please note that they answer must still be compliant with the specification.

We will only look at these answers once you have been selected as the preferred bidder. If we don’t believe that they are compliant with the specification we will inform you of this and allow you to amend it to comply. If you are unwilling/unable to make it comply your bid will be disqualified as a non-compliant bid.

1. **Training** – withreference to the specification please provide details of the training package that you are offering in relation to this case management system.
2. **Maintenance & Support** – with reference to the specification please provide details of the maintenance and support package that you are offering in relation to this case management system.
3. **Hosting** - please provide details on where and how the system is hosted with specific reference to location, physical security and measures in place to ensure GDPR Compliance.
4. **Project Plan** – addressing planning, design, acceptance criteria, acceptance tests implementation and roll out. This should also include proposed meetings, production of key documentation, key milestones and where applicable, the specification of the hosting equipment

Scoring Matrix

| **Score** | **Meaning** |
| --- | --- |
| 0 | Unacceptable response. Whilst the essential requirements may be met the bidder has not sufficiently demonstrated how and therefore it is not possible for us to know whether the proposed system would in fact meet our needs. |
| 2 | Poor response. The essential requirements are met but are not user friendly and/or require substantial training for the user.  If customisable elements have been requested these are limited and difficult to customise by the Customer and require input from the supplier. |
| 4 | Adequate response. The essential requirements are met. The bidder has managed to show, through the use of examples and explanation, that on the most part they are user-friendly.  If customisable elements have been requested these can be done by Customer with only complex customisations requiring input from the Supplier. |
| 6 | Good response. The essential requirements are met. The bidder has managed to show, through the use of examples and explanation, that they are user-friendly.  If customisable elements have been requested these can be done by individual users. Complex customisations may require input from the IT team or the Supplier. |
| 8 | Very good response. The essential requirements are met. The bidder has managed to show, through the use of examples and explanation, that they are very user-friendly i.e a person can use the system with very little training.  If customisable elements have been requested these are mostly done by individual users. Complex customisations may require input the IT team but not the Supplier. |
| 10 | Excellent response. The essential requirements are met. The bidder has managed to show, through the use of examples and explanation, that they are extremely user-friendly i.e. a person can use the system with no training due to it being intuitive.  Where there are desirable requirements a bidder will not be awarded a 10 unless it can deliver an element of the desired requirements.  If customisable elements have been requested these are mostly done by individual users including for more complex customisations. |