NHS
Health Education England

DN481014 Appendix A – Requirements Response Template

Please complete this template with your response to the requirements. The evaluation criteria that will be used to score your bid by the evaluation panel is attached to the ITT documentation at Appendix H. Please note that failure to submit your proposal in this format may render it invalid. Please provide a word count for each response.

Please submit this document in Word format only. PDF is NOT accepted.

Any additional documents not requested, words exceeding the maximum limits per question, bibliographies/references and any hyperlinks and/or website links will be removed from your responses prior to being sent to the evaluation panel. Where pictures of tables, diagrams or illustrations containing words have been inserted the whole picture will be removed if the response is over the word limit.

Please ensure that you have submitted all requested documents within your submission, as per the ITT instructions.

Bidder Organisation:	
Please indicate any partner/consortium organisations:	

3%	**General requirements**
1%	**1. We require a delivery partner with significant expertise, experience and reputation in discovery services** Describe the attributes and capabilities of your company that you judge to be especially relevant to meeting our requirements. Provide a list of your discovery service customers in the UK and in the NHS. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**2. We require a system that will continue to evolve and develop** Describe the roadmap and future vision for your discovery service solution and explain the degree to which enhancements will be delivered as part of the ongoing annual maintenance fee. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**3. We require a solution that complies with industry standards** Describe how your solution complies with the following, including as they evolve: a) NISO ODI initiative[1] b) KBART[2] c) COUNTER[3] d) Web Content Accessibility Guidelines (WCAG 2.0) and assistive technologies e) The Public Sector Bodies (Websites and Mobile Applications) (No.2) Accessibility Regulations 2018[4] Describe compliance with any other initiatives or standards you judge to be relevant. **Maximum narrative word limit: 600**

[1] ODI: Open Discovery Initiative https://www.niso.org/standards-committees/odi
[2] niso.org/standards-committees/kbart
[3] https://www.projectcounter.org/
[4] The Public Sector Bodies (Websites and Mobile Applications) (No.2) Accessibility Regulations 2018
https://gds.blog.gov.uk/2018/11/21/public-sector-website-accessibility-statements-what-you-need-to-know/

6%	**NHS specific requirements**
2%	**4. We require a solution tailored to the needs of the NHS and wider healthcare workforce in England** Describe how your solution will be tailored to meet the needs of the healthcare workforce in England, in terms of the types and breadth of resources covered, highlighting UK-specific sources, the indexing and retrieval of health and care knowledge resources, and any other features which may particularly support the requirements of this large, diverse and mobile workforce. In particular we require functionality that will suit both infrequent ('novice') searchers who require intutive searching such as that offered by Google AND advanced searchers who need to carry out structured, patient-focused searches of the research literature. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
2%	**5. We require a solution that will work effectively with our NHS OpenAthens Org ID structure and minimise login requirements** Describe how your solution will work with our current Org structure. Confirm that your solution will handle access entitlements such that: o Ungated and open access content is available to all users without the need to login o Nationally purchased content can be cascaded to all orgs. o Consortia purchased content can be cascaded to all orgs in a consortium (e.g. a regional purchasing consortium or a mental health purchasing consortium) o Locally purchased content can be managed and cascaded to one or more single orgs. Please clarify whether you envisage a separate 'instance' of the discovery service for each Org. OpenAthens Orgs change (e.g. due to reconfiguration of NHS trusts), our access and identity management system will need to be re-procured in 2022, and we will continue to seek ways to reduce complexity and simplify access. Please comment on the flexibility of your solution to support these changes. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**6. We require a solution that provides a coherent, unified national service but which allows a degree of local customisation**

	We want healthcare staff across the country have a similar, familiar, high-quality experience of using the discovery service, wherever they work and as they move between organisations, albeit that the content they can access will vary. However, some NHS Trusts will wish to add localisation elements (e.g. Trust branding, signposting to bespoke local services). How will you help us achieve both these requirements? **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**7. We require a solution that will work across a wide-ranging IT environment including a variety of browsers, desktop and mobile devices** Please state what the minimum and optimal browser and IT requirements will be. How well can users expect the service to work on mobile devices? **Maximum narrative word limit: 600**
Response	Bidder to provide word count
6%	**A service which is part of a discovery and delivery ecosystem and links users to library services**
2%	**8. We require a solution that effectively integrates with library management systems from different providers** Please complete Appendix E and comment here on the extent to which your solution will enable users to view and undertake transactions such as view their loans and renew and reserve items. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
2%	**9. We require a solution that enables users of _other_ search interfaces to access the full-text they are entitled to** Please confirm that the link resolver and knowledge base which is being provided as part of your tendered solution has a documented, transparent, and open API. Please confirm that your tendered solution will enable healthcare staff searching via these interfaces to access full-text resources licenced for their use: a) the native interfaces of proprietary bibliographic databases (as a minimum, those from EBSCO, ProQuest and Wolter's Kluwer (Ovid) b) PubMed and Google Scholar

	c) other discovery related services and browser plug-ins such as LibKey Nomad, Lean Library and Yewno Discover **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**10. Discovery service users need to be able to request items they cannot find or access in full-text format** Please describe how your solution will enable this, including how requests will be routed to the user's local library service for sourcing and supply. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**11. Discovery service users need to be able to contact their local library service for support** Please describe how your solution will enable this. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
10%	**Content**
4%	**12. We require a system that enables full exploitation of a wide range of resources** Please complete Appendix C and comment here on the extent to which the solution offered will ensure that users can find relevant results from across *all* types of content available to the healthcare workforce, including high quality free-to-use resources, and content in local repositories, as well as content purchased from third party suppliers. Are there any healthcare publishers whose content cannot currently be surfaced via your solution? Is the knowledge base automatically updated from external sources such as other link resolvers (e.g. the KB+ 5[6] and GoKB[7] services) and collection updates from publishers? **Maximum narrative word limit: 600**

---

[6] Jisc Knowledgebase plus https://www.jisc.ac.uk/kb-plus
[7] Global Open Knowledgebase https://gokb.org/

Response	Bidder to provide word count
2%	**13. We require a solution that searches content held in repositories** Please see Appendix F for our assumptions about repositories. Describe your approach to, and your experience of, surfacing content held in organisational repositories. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
2%	**14. We require a solution that enables effective access to and management of e-books** E-books are currently purchased and managed in different ways, at national, regional and local level, in different formats. Title records may be included in LMSs and/or collections may be added to local discovery systems where these have been implemented. Describe how your solution will enable users to search and access the full text of the e-books licenced for their use, and how library staff will administer that access. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
2%	**15. We require a solution that enables effective access to and management of journals** The current link resolver and knowledge base enables library staff to select for inclusion and update all local e-journal and print journal holdings, including such details as print journal split runs and e-journal embargoes. Please explain how this will be possible via your solution. Please also confirm how your solution enables access to open access articles within hybrid journal titles. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
5%	**Ability to implement the service flexibly and at pace**
2%	**16. We require a delivery partner with capacity to provide comprehensive project management, implementation and customisation support** Describe the level of implementation support that you will be able to provide including the whole-time equivalent staff you will be able to dedicate to this project. Please see Appendix F for our assumptions about project management, project implementation and customisation.

	Maximum narrative word limit: 600
Response	Bidder to provide word count
2%	**17. We require a delivery partner who can work to our high-level implementation plan** See Appendix B for the high-level plan. An essential requirement is implementation of the discovery service, including all resources in Appendix C identified as 'essential for phase 1' and transfer of all the holdings on the current national link resolver and knowledge base by the end of July 2021, to allow a period of parallel running of both systems before the current LRKB expires at the end of September 2021. Please see Appendix F for our assumptions about transfer of holdings data. We also require integration with one regional library management system during phase 1. Please see Appendix F for our assumptions about integration with a library management system. Over the two subsequent development phases, we need to see as many additional NHS-funded and curated resources as possible discoverable via the service, and integration with further regional library management systems, to attract as many users as possible and fully realise the full benefits of this service for the workforce in England. Please describe how you will work with HEE, NICE, the current LRKB supplier, LMS suppliers and library service staff to meet or exceed our requirements and ambition. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**18. We require timely and effective staff training and end user support** Describe the level and type of training you will provide for HEE and NHS library staff who will be involved in customisation and administration, and end-user support, at national, regional and local level. Describe how users will be supported to make the best use of the service. Please see Appendix F for our assumptions about staff and user training. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
2%	**Support for streamlining and efficiencies**
1%	**19. We require a system that can be efficiently managed and streamlines library operations** Describe how we will be able to efficiently manage and maintain the service with minimal staff input but appropriate controls at national, regional and local level. If different instances of the service are envisaged, how easy will it be to replicate

	configurations across these? To what extent will you be able to add and maintain nationally and locally purchased resources on our behalf?
	Maximum narrative word limit: 600
Response	Bidder to provide word count
1%	**20. We are seeking a solution that will provide an A-Z journals listing and the basis of a 'union list of journals'** An A-Z journals titles list is currently provided (https://journals.nice.org.uk/) to enable *users* to see the journals available to them whether licenced nationally, regionally or locally, and whether print or electronic. Describe whether and how the solution will enable us to continue to offer this service. We would also like the LRKB to provide the basis for a national 'union list of journals' as a single place for *library staff* to search for print and e-journals held locally elsewhere to request copies under the CLA Licence on behalf of their service users. The list would need to be interrogated using commonly used protocols by regional library management and interlibrary document supply systems. Please comment on the extent to which your solution could help us deliver this ambition. **Maximum narrative word limit: 600**
Response	Bidder to provide word count
3%	**Ongoing support and maintenance**
1%	**21. We require excellent post-implementation customer support** Please see Appendix F for our assumptions about ongoing support including help desk support and upgrades. What are the response and escalation processes and availability hours of supplier support staff for critical issues (loss of access, loss of functionality, resource access issues, authentication issues, security breach)? How can more minor issues be escalated if needs are not being met? **Maximum narrative word limit: 600**
Response	Bidder to provide word count
1%	**22. We require high level performance** Describe the performance guarantees that the solution will deliver in terms of overall uptime and reliability, and responses times, especially for functions undertaken by end users. **Maximum narrative word limit: 600**
Response	Bidder to provide word count

1%	**23. We need robust and reportable data to measure use of the service, use of the resources and user satisfaction** Describe how your solution provides data to quantify the use of the service, the use of resources surfaced by the service and requests placed through the service. Are resources accessed by interfacing tools (e.g. LibKey Nomad) counted? Describe how your solution can help us gauge and monitor user satisfaction. **Maximum narrative word limit: 600**			
Response	Bidder to provide word count			
	24. Features			

(1% each)	For each of the features below, please confirm:
	    Are they included as part of the tendered solution?
	    Are they:
	        A: Installed at other customer sites and fully operational
	        B: Partially operational
	        C: Still in development
	    Can the feature be customised/configured and if so at what level?
	
	Maximum narrative word limit for each: 200
		Included?
		(Y/N)
			Status?
			(A, B or C)
				Customisable?
				(Y/N)

1%	a) Auto-suggest and auto-complete			
Response	Bidder to provide word count			
1%	b) Search stemming			
Response	Bidder to provide word count			
1%	c) Variant and incorrect spellings			
Response	Bidder to provide word count			
1%	d) Mapping from natural language search terms to precise terms and concepts e.g. database thesauri			
Response	Bidder to provide word count			

1%	e) Suggesting related terms and concepts. Include how your solution makes use of semantic and AI/machine learning approaches.			
Response	Bidder to provide word count			
1%	f) Topic overviews. Explain how the solution enables users to see a summary overview of a topic to assist initial understanding.			
Response	Bidder to provide word count			
1%	g) Options for limiting search results including "full text only", research journal vs monograph literature, e-books vs print books, publication date, language, "local holdings"			
Response	Bidder to provide word count			
1%	h) Relevance ranking			
Response	Bidder to provide word count			
1%	i) Quality ranking			
Response	Bidder to provide word count			
1%	j) Results sorting			
Response	Bidder to provide word count			
1%	k) Removal of duplicates. Include how your solution manages situations where the same article is available from more than one source			
Response	Bidder to provide word count			
1%	l) Seamless linking to full text, preferably one-click access			
Response	Bidder to provide word count			

Commercial in Confidence

1%	m) Saving search strategies and search results. Include how searches may be re-run and whether alerts can be set up when material fits the search strategy.			
Response	Bidder to provide word count			
1%	n) Sorting and exporting search strategies and results. How does the solution allow users to export their search results, search strategy, abstracts, metadata and full text of content, for example directly to MS Word, PDF, reference management software packages and in standard citation file formats, including RIS?			
Response	Bidder to provide word count			
1%	o) Sharing search strategies and results with others			
Response	Bidder to provide word count			
1%	p) Quick search and link to known items: what happens when a user pastes a full citation into the discovery system search box?			
Response	Bidder to provide word count			
1%	q) Phrase searching, truncation, wildcard, and proximity searching in the search box. Ability to type Boolean operators AND, OR, NOT and ADJ. Ability to specify whether the term is a major term.			
Response	Bidder to provide word count			
1%	r) Search and limit by field e.g. abstract, title, author journal name and categories (e.g. age range)			
Response	Bidder to provide word count			
1%	s) Build a search strategy by carrying out additional searches and combining different search lines			
Response	Bidder to provide word count			

1%	t) Single sign-on: ability to use personalisation features using authentication credentials (i.e. currently NHS OpenAthens account) rather than set up a separate account.			
Response	Bidder to provide word count			
1%	u) Personalisation: How individual user attributes (such as speciality, location, past search history) are used to help individuals discover the resources potentially most relevant to them. Please clarify whether these features can be switched on or off and configured and confirm how data protection and privacy requirements are met.			
Response	Bidder to provide word count			
1%	v) Personalisation: How and on what basis tailored recommendations are made to individuals. Please clarify whether these features can be switched on or off and configured and confirm how data protection and privacy requirements are met.			
Response	Bidder to provide word count			
1%	w) Personalisation: How and on what basis tailored alerts are provided to individuals. Please clarify whether these features can be switched on or off and configured and confirm how data protection and privacy requirements are met.			
Response	Bidder to provide word count			
1%	x) Personalisation: How individual users may 'tag' and comment on search their results. Please clarify whether these features can be switched on or off and configured and confirm how data protection and privacy requirements are met.			
Response	Bidder to provide word count			

1%	y) Signposting to those who may wish to try doing an expert search via the native interfaces of bibliographic databases			
Response	Bidder to provide word count			