

1. Leaders and Managers: Workforce Planning Insight Project

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1 Introduction

1.1 Purpose of document

This document is a Request for Proposal (RFP) to appoint a high-quality provider to support the Chartered Society of Physiotherapy (the CSP) in the delivery of the **Leaders and Managers: Workforce Planning Insight Project** aims and objectives.

The organisation intending to respond to this RFP is referred to throughout as *the Partner*.

This document is intended to provide the Partner with sufficient information to allow them to produce and deliver a formal proposal to the CSP.

The document is structured so that the Partner is provided with the following information:

- Background.
- Why this document is being issued.
- The process for review and selection.
- Detailed requirements (expectations of the proposal and evaluation criteria).

1.2 Background for the Leaders and Managers: Workforce Planning Insight Project tender

What is workforce planning?

Successful workforce planning for the NHS ensures that it has the right number of staff, with the right skills and competencies, in the right place, at the right time to deliver services that provide the best possible patient care and meet demand, within an affordable budget [1].

Safe staffing legislation and guidance exists in some nations for some professions. However, the impact that this has on leaders' and managers' workforce planning is not yet clear.

In England, the Long-Term Workforce Plan (2023) sets out the case for taking a more strategic, long-term approach to NHS workforce planning. It proposes actions to be taken locally, regionally and nationally in the short to medium term to address current and future workforce challenges. Health Boards in Wales are responsible for developing annually Integrated Medium-Term Plans (IMTPs) which feeds into national workforce planning. Within Scotland, Health Boards are responsible for workforce needs projections to contribute to national workforce planning by NHS Scotland. In Northern Ireland the Department of Health oversees Health and Social Care services, and workforce planning is carried out by the Workforce Planning Unit in the Department.

Relevance

Local, regional and national physiotherapy leaders and managers, need to be able to influence workforce decision making, to ensure the demands of population health needs for physiotherapy and rehab services are met. CSP insight from the Wales manager's forum and the CSP membership survey identified that members struggled to influence workforce planning, were not aware of how to do this or were not aware of legislation/policy that could support them.

We want to understand how physiotherapy workforce decisions are included in workforce assessments, plans and related strategies at a local, organisational and system/strategic level across the 4 Nations. We are keen to explore leaders' and managers' experiences of contributing/influencing to workforce planning.

1.2.1 Project Aim:

To gain greater understanding of the strategic and operational policies, across 4 Nations, where physiotherapy workforce planning is identified.

To explore leader's and manager's experiences of influencing/contributing to physiotherapy workforce planning.

An award of £40,000 if being offered to HEIs or independent consultants interested in exploring workforce planning with leaders and managers. Duration of award TBA (July/August 2024-February 2025).

1.2.2 Project Objectives

1. To conduct a literature/policy review, across the 4 Nations, to identify decision making processes and mechanisms for influencing physiotherapy workforce planning, national policy, guidance and legislation relevant to physiotherapy workforce planning.
2. To conduct a literature/policy review across the 4 Nations of NHS/health workforce plans at Integrated Care System level in England, Integrated Medium-Term Plans in Wales, workforce plans of Health Boards in Scotland, and the workforce planning unit in Northern Ireland. To include compiling plans and carrying out a comparative review of the extent to which the physiotherapy workforce is included in these.
3. To scope and identify key lines of enquiry to use at stakeholder events, e.g, external and internal challenges, staffing levels legislation and guidance, perceptions of workforce planning, responsibility, accountability.
4. To scope and engage relevant stakeholders, across the 4 Nations, e.g leaders and managers at local, organisational and strategic level.
5. Based on the findings, develop recommendations that will improve physiotherapy leader's and manager's influence of workforce planning.
6. To summarise review work into a project report for 4 Nations decision making, identifying trends and differences.
7. To summarise recommendations from stakeholder events into a written report and include case studies where available.
8. To support the CSP in dissemination of the findings as determined by an agreed communication plan.

1.2.3 Project Deliverables

1. To synthesise the evidence base into a written report with recommendations for the CSP to use with future planning and comms.
2. To produce a written report of the insight work and make recommendations for the CSP to use with future planning and comms.

Link with CSP Strategic Aim and Workstream

Aim: A-Improve the health of communities through high quality physiotherapy

- Workstream: A2- Promote physiotherapy staffing levels that meet current and planned service needs and reflect society across the public, private and not for profit sectors.

1.3 Why this document is being issued?

The CSP are now looking to work with a Partner, who can conduct an insight piece with a wide range of stakeholders, to deliver the aims and objectives of this work.

The CSP invites interested parties to submit an electronic written proposal.

Return via email to: tenders@csp.org.uk

Deadline: Tuesday 4th June 2024, 12.00pm (midday)

This document sets out requirements and asks Partners to outline how they can meet these requirements, and to provide associated timescales and costs.

The RFP is intended to provide the Partner with sufficient information to allow them to produce and deliver a formal written proposal that is acceptable to the CSP for the purposes of comparison and evaluation. Following the evaluation of responses, the CSP will select a shortlist of Partners to move to the next stage in the process.

1.4 Introduction to the CSP

The CSP is the professional, educational and trade union body for the UK's 65,000 chartered physiotherapists, physiotherapy students and support workers and our strategy for the next three years focuses on building a thriving physiotherapy community, championing physiotherapy, maintaining an effective and sustainable organisation, and supporting members in their professional and working lives.

Our mission and vision

The mission and vision set out what we are here to do as an organisation, and what we are aiming to achieve as a profession.

Our mission for the CSP

- To transform the health and wellbeing of individuals and communities by empowering our members and exerting our influence.

Our vision for physiotherapy

- To transform lives, maximise independence and empower populations.

Our strategic aims

- A. Build a thriving physiotherapy community.**
- B. Champion physiotherapy**
- C. Maintain an effective and sustainable organisation.**
- D. Support members in their professional and working lives.**

Each strategic aim had multiple workstreams.

It is key that this work also aligns with the values of the CSP which are central drivers to the vision of the project overall. The CSP values are:

- **Learning**
 - With curiosity and innovation
 - Through empowerment and collaboration
 - To drive adaptation and remain highly relevant
- **Courage**
 - To lead change and do things differently
 - Through standing tall, embracing different perspectives and having difficult conversations
- **Integrity**
 - With a responsibility to drive high moral and professional standards
 - To be accountable, respectful and deliver to our commitments as the professional and educational body for physiotherapy
- **Inclusion**
 - Through embracing diversity in meaningful ways
 - To ensure different opinions are heard, considered, voiced and -when needed- amplified
 - With respect to all people and communities

2 Instructions for Completion

2.1 Overall selection timetable

Key stages in the selection process are as follows. At all stages the CSP are seeking to reduce the number of Partners to reach a final preferred selection.

Issue RFP – (this document). This stage sets out the CSP’s detailed requirements, and the responses will allow a detailed analysis of the Partner’s suitability as a provider.

Return RFP – Responses are to be returned as per the instructions in section 2.4

Presentations - If selected to move to the next stage, the CSP will ask Partners to attend an interview with the project team. See section 2.7.2.

Selection of Preferred Partner: It is anticipated that a preferred Partner will be identified and informed by **Thursday 27th June 2024**, but the CSP reserve the right to change or amend this date if they need to for any reason.

2.2 Contact

All queries and responses to this RFP must be to both the following contacts:

Primary Contact Anita Watson-Programme Manager
watsona@csp.org.uk
Zoom Call: 02073066158

Secondary Contacts Calum Higgins-Public Affairs and Policy Manager for Wales
higginsc@csp.org.uk
07786324499

No other contact should be made to members of staff from the CSP without express permission from either the primary or secondary contact as above.

2.3 Additional information

Submissions received after the deadline will not be reviewed/accepted. Following shortlisting, successful applicants will be notified by **Monday 17th June 2024** and asked to attend a virtual interview via MS teams.

Interviews are expected to take place week commencing **Monday 24th June 2024**. We welcome and strongly encourage an informal conversation about the project. Please contact Anita Watson watsona@csp.org.uk

There will be a period for clarity questions and an online Q&A at **Thursday 9th May 2024, 10-11.30am** related to this tender and other tender opportunities for interested parties.

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Click here to register for the webinar: [Webinar Registration - Zoom](#)

Please submit any questions to watsona@csp.org.uk. We will aim to respond to the questions to all who expressed interest in the tender by **Thursday 9th May 2024**.

2.4 Responses

As previously stated, providers wishing to be considered for this commission should submit an electronic written proposal to the CSP, answering the evaluation criteria descriptors in Section 4, along with the **confidentiality agreement attached below in Appendix 1**, to tenders@csp.org.uk.

Deadline: Tuesday 4th June 2024, 12.00pm (midday).

Please ensure the email is clearly marked **Leaders and Managers: Workforce Planning Insight Project** to ensure it is not opened prior to the Tender Submission Date.

Interviews are expected to take place in week commencing Monday 24th June 2024 (excluding Bank Holiday Monday).

Submission Timescale

Tender released	Monday 29 th April 2024
Webinar Q&A	Thursday 9 th May 2024, 10-11am
Respond to Q&A from interested parties	Thursday 9 th May 2024
Deadline for tender submission	Tuesday 4 th June 2024, 12.00pm (midday).
Notification of successful shortlisting	Monday 17 th June 2024
Interviews	W/C Monday 24 th June 2024
Interview outcome	Thursday 27 th June 2024
Contract duration	TBA (July/August 2024-Feb 2025)

Written proposals must be returned at the latest by **Tuesday 4th June 2024, 12.00pm (midday)** to tenders@csp.org.uk

A copy should be sent via email to the primary contact watsona@csp.org.uk

The CSP reserves the right to request hard copies of proposals are sent to its London address.

Your document should include answers to all sections of the tender proposal (Section 3) and evaluation criteria (Section 4). Please respond with clear, concise, complete answers and ensure that all points are addressed. You should specify any assumptions you make when answering the questions. Any relevant schedules should be included as required.

A full breakdown of costs of providing services required should be provided.

2.5 Clarification

If clarification of any aspect of this document is required, queries should be directed to the contacts as set out in Section 2.2. Partners should be aware that the CSP reserves the right to circulate any such queries and answers to all prospective Partners on a Partner confidential basis.

Questions for clarification of process or requirements should be made in writing by email to the primary contact.

2.6 Contractual Issues

The successful Partner shall be deemed to be contractually bound to the responses to this RFP and any accompanying schedules and to have accepted all the provisions and the principles contained in this RFP. To the extent that any replies to this RFP derogate from the terms that potential Partners are required to accept under this RFP process then such derogations shall be considered in evaluating the applicable Partner's response.

The CSP reserves the right to suspend or abandon this procurement exercise at any time. The existence of this RFP does not indicate or imply an intention by the CSP to enter a contract with any Partner. The CSP shall have entire discretion regarding the decision to conduct a competitive exercise in relation to all or any of the subject matter in this document. In responding to this document each potential Partner shall accept that it shall bear the costs of responding to the document and engaging in the next phase of this procurement process.

All proposals must be valid for a period of no less than 120 days from the submission date.

No obligation to contract

The CSP is not obliged to accept any of the proposals it receives relating to this RFP.

The CSP may negotiate further with any or some of the Partners during the course of this process. In the event that a particular Partner is selected for further negotiation, and those subsequent negotiations result in the failure to reach full agreement, the CSP reserves the right to resume negotiations with other Partners who have submitted proposals.

The CSP may, upon receipt of any proposal, decide to contract for either the entire project or portions of it depending on the suggestions made and the budget available to the CSP.

All costs of preparing proposals in response to this RFP should be borne by the Partner and will not be reimbursed, regardless of whether the Partner is subsequently awarded any contract as a result of this process.

In recognition of this, the Partner will retain all IP rights in their proposal documents and the CSP will not reuse Partner documents for any other purpose, although noting that there are not any IP rights accrued in ideas, only their specific form as presented in Partner proposal documents.

2.7 Next steps

2.7.1 RFP Return

Any Partner wishing to offer a written proposal must ensure this is received by **Tuesday 4th June 2024, 12.00pm (midday)** to tenders@csp.org.uk as noted at section 2.4. Any proposals received past this cut-off date will not be considered, nor returned. We will confirm receipt electronically of the email RFP as soon as possible.

2.7.2 Presentations

If selected to move to the next stage, we will invite you to interview with the CSP project team. The interviews are to be held w/c **Monday 24th June 2024**. Interviews will last no more than 60 minutes in duration (including time for questions to the CSP panel).

Interviews will be held via MS teams and Partners will be sent an invite.

2.7.3 Client References

We will request details of up to 3 clients that the CSP can contact for references.

2.7.4 Selection of Preferred Partner

The CSP expects to select a preferred Partner by **Thursday 27th June 2024**, all responders will be notified of the decision as to whether they have been successful or not.

3 Tender Proposal

In submitting your tender, we are seeking a written submission (1,500-2,000 words) which will detail how you will deliver the contract to fulfil the evaluation criteria (detailed in Section 4). It will need to provide sufficient detail for us to understand how your proposal will work and specifically how you would achieve the stated research aims and objectives within this specification.

In addition, the submission should include the following supporting documents:

1. A page that includes an indication that the document constitutes a formal response to the CSP's invitation to tender to undertake the project: 'Preceptorship Insight Project' and the name(s) of the organisation submitting the tender.
2. The individual with whom all communication should be made regarding the progress of the tender's consideration, and the supply of their contact details.
3. Include a contents page, with the structure and sections of the document clearly specified and providing responses to the evaluation criteria, including the provision of any additional information as appendices (see point 6 below).
4. All pages to be numbered.
5. Tender documents should be titled including the name of your organisation/institution and submitted to tenders@csp.org.uk
6. Additional information can be provided as appendices, submitted in electronic form. Each appendix should be clearly labelled and referred to in the text/presentation of the main submission, so that the nature and purpose of the additional information is clear.
7. Specific appendices should be provided that provide the summary curricula vitae for each team member who would be materially involved in undertaking activity within the project.

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Additional information can be provided in the form of digital links to other resources (for example, material that the tenderer has produced previously). Where provided, care should be taken to ensure the following:

- Permission has been secured to provide the link (where required).
- The link is operational.
- The purpose of supplying the additional information is clear.

Tender documents and supplementary appendices should be submitted in an electronic format and sent to tenders@csp.org.uk by the **Tuesday 4th June 2024, 12.00pm (midday)**.

4 Evaluation Criteria

The contract will be awarded to the contractor that is best able to meet the CSP's needs and aims as defined in this document and can demonstrate that their proposal is best value. The evaluation criteria also align with the CSP values. Failure to provide all or part of the information may result in your submission being excluded from the evaluation process. Please provide details on the following criteria:

NOTE: All information received must be relevant to this procurement and concise. Excessive corporate information that is not tailored to the specifics of this procurement and tailored to describing how your bid meets our needs will be disregarded.

4.1 Overall Approach to Business (45% weighting)

Let us understand more about your ways of working:

1. Please explain why you would like to work with the CSP and why your organisation will be a good fit for this procurement.
2. Please describe your overall approach of how you would deliver the project.
3. What are your organisational values and how do you ensure these are reflected in how you do your work?
4. How does your organisational culture fit with CSP values?
5. What is your understanding of the project brief and objectives of this work in relation to the tender.
6. What would be your methodological approach to addressing the research brief?
7. Please outline your proposed project design with detail of methods and methodology, in line with the tender specification, objectives and deliverables to address the project brief and considering the needs of the CSP and the intended professional audience
8. Please outline your intended plans to meet the objectives and outputs of the project.
9. Outline how you have considered equality, diversity and belonging within your processes and planning.
10. Please describe how you will implement sustainable working practices.

4.2 Services to CSP (20% weighting)

Tell us more about what you can offer us:

- | |
|--|
| 1. Please explain your proposed processes for reporting project progress and data to the CSP. |
| 2. How will you work with the CSP Project Team to ensure the project meets the objectives set? |
| 3. How will you ensure delivery of project outcomes within the defined timescale? |

4.3 Stakeholder Experience and value for money (30% weighting)

Tell us how you support high quality service and engage with the CSP.

- | |
|---|
| 1. How will you document/measure stakeholder engagement as part of projects like this? Include consideration of data protection measures. |
| 2. How will your team ensure inclusive stakeholder engagement is of a high level? |
| 3. What is your preferred communication strategy to ensure optimal working relationships between the CSP and yourselves (e.g, how often do you believe we need to meet? How would you respond to business-as-usual requests from the Team?) |
| 4. Please describe your previous experience of successful project completion and evidence that objectives were met. |
| 5. Please outline relevant experience and expertise (content, technical and contextual) of the project team aligned with this project brief. |

4.4 Costs (5% weighting)

Tell us about how you cost your services:

- | |
|--|
| 1. Please provide details of your costs and how they are calculated (include details of any wider team delivery and/or additional cost). |
|--|

4.5 Relevant Existing Provisions

- | |
|---|
| 1. Please provide details of up to 3 clients that the CSP can contact for references. |
|---|

5 References

1. <https://www.kingsfund.org.uk/insight-and-analysis/long-reads/nhs-long-term-workforce-plan-explained#:~:text=What%20is%20workforce%20planning%3F,demand%2C%20within%20an%20affordable%20budget>