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**System Selection – Invitation to Tender**

**Submission Deadline: 03 March 2023**

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# 1 Introduction

This document is an Invitation to Tender (ITT) for the provision of an HR system solution for University of Salford.

It has been developed following a review of business and system requirements. This document provides an overview of the business and the critical systems requirements required from the solution.

It is intended to provide prospective vendors with the information they need to develop proposals, which are tailored for addressing these requirements. It also provides details of the tendering process and information required from vendors interested in submitting proposals for this project.

It is the intention that this contract will last for a minimum of 10 years, subject to annual reviews.

# 2 Background

The University of Salford community encompasses over 23,000 students, 2,500 staff and 170,000 alumni who come to study, teach and research at Salford from all around the world. The University of Salford’s thriving industry-focused research is cutting edge, rising to the challenges and opportunities of the fourth industrial revolution.

## 2.1 Background Information

The University of Salford currently uses a combination of ad-hoc systems, with SAP as the core HR and payroll platform. We operate a basic SAP package with limited functionality, leading to convoluted and labour-intensive processes which are risk inherent and prone to failure due to reliance on manual data input. This poses a major risk to our data quality and data governance. We have had to make the system ‘fit’ the way the University works over the years, resulting in the installation of a lot of bespoke updates. The platform is now highly customised, which results in the inability to install standard updates and a need for regular manual service intervention. The payroll team have a lot of labour-intensive work to ensure payments are made on time and correctly.

The lack of integration between systems results in minimal control of colleague master data. There is no case management system for formal casework, again, leading to challenges in reporting/identifying trends and issues. With no employee or manager self-service, even the simplest of tasks requires intervention and manual effort from our HR colleagues. We need an enterprise solution.

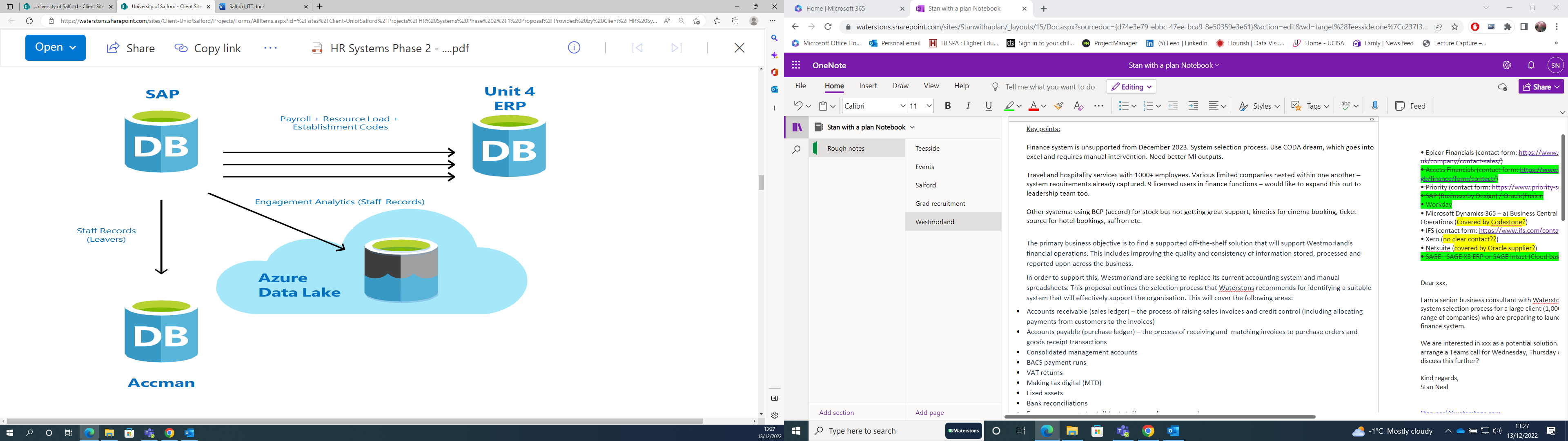
## 2.3 Existing Core Systems

The summary below provides a high-level overview of the existing core systems used by the University of Salford;

* **Halogen** – This is our document management system for employee records. The system allows PDF files to be uploaded and stored. From a data retention perspective, it isn’t easy to remove single pages from the database, so a user has to download the complete PDF, remove the required pages and then re-upload. Employee numbers and names have to be inputted manually leading to data quality errors. As a standalone database, if employees leave or change their name, updates have to be made manually by running reports from the core SAP system to identify any changes. The system works, but the lack of integration and manual nature of updating files is arduous and time consuming.
* **Oleeo** – this is our Applicant Tracking System for resourcing and was a free upgrade from our previous version of WCN. Oleeo has been recently implemented across the University (March – Sept 2021). We are currently experiencing some issues with the system in terms of reporting and functionality, and users across the University are finding the new system ‘admin heavy’. Oleeo doesn’t talk to SAP, meaning that the onboarding process still involves a lot of admin to transfer applicant details into the core SAP platform. We have to use a manual Excel tracker to monitor vacancies and applicant progress.
* **SAP SuccessFactors** – We use SAP SuccessFactors for Performance Development Review (PDR) processes within our professional services departments (academic colleagues still use spreadsheets). SuccessFactors doesn’t talk to any of our other systems meaning there is a lot of manual intervention and data inputting. There is some dislike from employees towards the system which leads to a lack of engagement with the process.
* **LearnUpon** – LearnUpon is our e-learning platform. LearnUpon houses all our online training provisions but is not connected to any other platforms. Compliance around mandatory training has to be extracted manually, and reporting from SAP has to be conducted to ensure that the data within LearnUpon is accurate – this is manual activity/intervention.
* **Hourly Paid Academics Power App** – This has been built internally by a member of our finance team and allows our hourly paid colleagues to submit timesheets for work completed. Line managers can also submit contract requests for these colleagues through this app. Again, this system is standalone and doesn’t talk to any others, so requires reports to be downloaded so data can be transferred to other platforms. Some automation of documentation is included but manual intervention is still required.
* **MySalford/Sodexo** – MySalford is our reward/benefits platform supported by Sodexo. Within this platform our employees can purchase additional leave, apply for the cycle to work scheme, download discount vouchers etc. As the system doesn’t talk to SAP we must manually send our new starters to Sodexo each month so they can be uploaded. This means that some colleagues don’t get access to the platform until up to a month after starting with us. There are additional complications around some of the benefit application processes – as an example, if colleagues choose to purchase additional annual leave, they have to input their salary, hours etc manually meaning that everything that comes through to HR has to be double checked or rejected as the information can contain errors (and regularly does).

The following diagram shows some more detail on the integrations that are currently in place and there will be a requirement for these (and in particular to Unit4/UBW) to be replaced in the new solution.

## 2.4 Current integrations



# 3 Tender Timescales and Process

## 3.1 Tender Procedure Overview

As a result of the timescales involved, the system selection process will be run promptly and is currently anticipated to be completed by week ending **14 July 2023** to maximise the time available to the bidder ahead of the overall project deadline. The key milestone dates are shown in brief below:

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Issue ITT to Vendors | 23 January 2023 |
| Deadline for ITT return | 03 March 2023 |
| Product demonstrations & clarification | 20 March - 31 March 2023 |
| Final decision (following business case approval at full University Council meeting in July) | 14 July 2023 |

**Key points to note:**

* Responses to this ITT should be received no later than **12:00noon (GMT) hrs on 03 March 2023**.  Submissions will not be accepted after this time.
* The University of Salford reserve the right to adjust this timescale without notice if it is necessary to do so due to business or external circumstances.
* Bidders are encouraged to take note of the demonstration dates included above.
* If any bidders are unable to meet these dates for workshops/demonstration sessions, this should be clearly identified in the ITT response

Following the ITT stage, the process is expected to continue as follows:

## 3.2 Review and scoring of ITT responses

We will review and score all the responses to the ITT received. Except by prior arrangement or in exceptional circumstances, respondents who fail to meet the deadline or those who fail to adhere to the response format requested will be excluded from further participation in the process.

If this ITT process should yield no satisfactory responses, the University reserves the right to amend or re-issue the ITT.

## 3.3 Clarification and follow-up questions

Bidders will be expected to deliver demonstrations of their solution to provide clarification of processes to the University of Salford where required. Depending upon the complexity of requirements, one or more demonstrations may be required during which bidders will be asked to show the capabilities of their solution in accordance with a fixed, timed agenda, which may include scripted scenarios.

Where appropriate and possible, real-world demonstration data may also be provided to bidders ahead of time, enabling them to make their demonstrations as relevant and realistic as possible for the group attending the demonstration.

Suppliers should ensure that members of their proposed project team who will be responsible for delivering their solution are involved in the demonstration.

## 3.4 Bidder Selection

Bid submissions will be scored/evaluated by a dedicated University panel.

Please note that scores may increase/decrease based upon the demonstration supporting the written bid submission.

## 3.5 Communications and Feedback

Communications with bidders at all stages throughout the project will be conducted via the InTend portal, including clarifying any questions and responses. Any clarification requests or enquiries received outside of the portal will be redirected back to the portal to ensure we retain transparency throughout the procurement process.

Feedback from the process will be given to unsuccessful bidders. We will always ensure that all feedback and scoring is undertaken transparently; we will retain all records for a period agreed with the University to ensure that questions from bidders can be answered accurately and transparently should any scoring or selection outcomes be questioned.

# 4 ITT Response

## 4.1 General Information

Bidders responding to the ITT must follow the guidance below:

* All correspondence and information relating to this process, the University, and the sector in which they operate, must be treated as confidential and no information should be given to third parties under any circumstances.
* All questions regarding the content of the ITT, response format, selection process, scoring or University requirements MUST be directed via the InTend portal.
* Please contact the University via InTend if you require any further clarifications or information. Suppliers should not state “more information is required” in their response.
* The ITT response must contain all details requested. Incomplete responses will not be scored.
* Responses must be clearly laid out with all information contained therein. Web-links to content will not be accepted.
* Responses should be submitted via InTend. Attachments to the response in the form of PDF files are acceptable.
* Bidders should indicate where the solution does not fully meet the requirements and document how it will deal with this gap. This will not exclude the proposed solution from consideration.
* Minor customisations to each solution may be accepted; some requirements may be met through integration with another product or system, but where this is expected to be the case, explicit reference must be made in your response to any other systems, plugins or software packages required, and the arrangements for the implementation and support of such items.

# 5 Response requirements & weighting

Suppliers responding to this ITT are expected to provide a complete submission containing all details requested in the next two sections. Incomplete responses or those missing requested items may be rejected. Suppliers must reference the relevant section number in their response (e.g., 6.1 brief company overview).

Each section carries a percentage of the total response score. To achieve the maximum score, suppliers must provide a complete response demonstrating that they have fully understood the requirement, that they have considered the University’s business, and that they have provided a specific response tailored to the University’s needs and their understanding of the business.

During this evaluation process, suppliers may be asked to provide additional information or clarification of their response if appropriate.

**5.1 Response weighting**

Suppliers’ responses to this ITT document will be evaluated for completeness, quality of proposed solution, and overall cost, with the following weightings given:

|  |  |  |
| --- | --- | --- |
| **Section** | **Response Component** | **Percentage Weighting** |
| 6.1 | Company Overview | Information Only |
| 6.2 | Solution & Platform Details | 5% |
| 6.3 | Project Implementation Methodology & Plan | 10% |
| 6.4 | Training & Knowledge Transfer | 5% |
| 6.5 | Project Team | 2% |
| 6.6 | Support Structure and Account Management | 5% |
| 6.7 | Cost | 30% |
| 6.8 | System integrations | 5% |
| 6.9 | Sector References | 5% |
| 7.0 | Solution Requirements (max score: 1965) | 33% |

Each section listed above will be scored on the following scale:

|  |  |  |
| --- | --- | --- |
| **Rating** | **Score** | **Definition** |
| Excellent | 5 | Exceeds the requirement |
| Good | 4 | Satisfies the requirement and provides confidence of ability to deliver the service |
| Acceptable | 3 | Appears to satisfy the requirement |
| Minor Reservations | 2 | Appears to satisfy the requirement with some reservations |
| Serious Reservations | 1 | Appears to satisfy the requirement with major reservations |
| Unacceptable | 0 | Does not meet requirement |

The cost element will be scored out of a maximum of 5 marks, with the scores calculated based on the lowest cost receiving 5 marks. The rest of the submissions will be awarded scores that are proportionate to the lowest cost. This will then be weighted as per the table above.

## 5.2 Tender acceptance

The University will aim to manage business processes to incorporate expected failure rates/ downtime of equipment and solutions. Suppliers should provide details of reliability levels and failure rates of their solution prior to signing contracts.

The University may require a meeting with the supplier’s assigned project team, prior to signing of contracts.

The University will require the supplier’s full terms of business prior to signing of contracts

# 6 Supplier Approach and Competence

## 6.1 Brief Company Overview

Indicate any specific advantages which you believe represent the most robust case for your organisation being selected to provide the services detailed in this document.

Provide details of industry accreditations and ISO/Country specific security certifications.

|  |  |
| --- | --- |
| **Question** | **Answer** |
| **Please state the following:** |  |
| *Registered Name* |  |
| *Company Registration Number* |  |
| *Date of Incorporation* |  |
| *Registered Address* |  |
| *Contact name for this ITT process* |  |
| *Position* |  |
| *Contact telephone number* |  |
| *Contact e-mail address* |  |
| *Number of new implementations currently in progress (for the implementation partner)* |  |
| *Number of upgrades currently in progress (for the implementation partner)* |  |
| *Number of new customers acquired in the last 3 years (for the implementation partner)* |  |
| *Customer retention figures over the last 3 years (for the implementation partner)* |  |
| **Please state UK and global based staffing levels in key business areas (split by solution author and implementation partner):** |  |
| *Sales* |  |
| *Support* |  |
| *Project Management and Delivery* |  |
| *Administration* |  |
| **Please state staff turnover as a percentage of total staffing in the business over the preceding 3 years (split by solution author and implementation partner):** |  |
| *2021-2022* |  |
| *2020-2021* |  |
| *2019-2020* |  |
| **Will all services and products be provided and delivered by the supplier?** |  |
| *If NO, please state the names and business activities of any subcontractors* |  |
| **System Stability and Reliability:** |  |
| *Number of support incidents raised per 1000 users of proposed products in preceding 12 months (for the implementation partner)* |  |
| *Please provide the number of customer complaints you have received in the last 12 months (for the implementation partner)* |  |

## 6.2 Solution and platform details

* Provide full details of the software solution proposed, including:
* Software package(s) and versions proposed;
* A visual representation of the solution and the modules available, clearly identifying those needed for the immediate project vs. any that could be available at a later date;
* If multiple products are involved, full details of any interfaces or integrations between them;
* How the solution can be accessed (e.g. supported browsers, devices, desktop application).
* Provide details of operating system, and any other software requirements, for University machines.
* Explain how updates and upgrades are applied, e.g. are these pushed out automatically or does the University have an option of when to apply this?

## 6.3 Project implementation methodology and plan

* Describe your implementation methodology for delivering the proposed solution to the University. This should include software configuration, training, testing, cutover and post-project handover.
* Include a detailed project plan specific to the University’s requirements. This should explicitly state what modules are to be implemented when, and what will be live at key milestones.
* State the expected resource requirements of the University at every stage of the plan, e.g. how many University days per consultancy day provided by the supplier.
* Suppliers should describe their plan for handover between the implementation team and business-as-usual support following cutover and post go-live support.
* Details should be given of documentation, handover and training which will be delivered to suppliers’ support teams as part of the transition process.
* Suppliers must identify any expected support from the University during the handover process (e.g., facilitating visits to site, providing documents or data, points of contact, etc.).

## 6.4 Training and knowledge transfer

* Explain how you will deliver user training and knowledge transfer to the University’s employees. The University requires that suppliers provide sufficient knowledge transfer to allow them to internally manage and maintain the solution, for example, user management, metadata management, forms management, workflow or business process changes. Please document your approach to ensuring that the University has adequate detailed solution knowledge to achieve this aim.
* Provide details of training delivery methods, locations, and how you will reach employees in different locations.
* Provide some examples of training materials, solution documentation, help-sheets, user guides, etc.
* Please explain what training materials are available after the transition to BAU, to ensure that the University continues to learn and improve their use of the system, and also to support new members of staff as they join the business.

## 6.5 Project team

* Provide details of the project team that will deliver this project.
* Include CVs/profiles for proposed implementation team members.
* Please set out your expectations of the University’s resource requirements e.g. number of project team members, required roles, and resource commitment levels.

## 6.6 Support structure and account management

* Suppliers are required to give details of their support structure and the composition of their support team
* Suppliers must provide SLAs with response and fix targets, including details of the priorities and the basis on which these are allocated
* Please provide actual service levels achieved over the last 12 months
* Suppliers must document what their support and maintenance charges cover, and any restrictions on use
* A description of methods of accessing support, operating hours, and a visual representation of the support process from logging an issue through to resolution (including escalation paths, communications, etc.) must be provided
* Full details of the support cost model should be provided including any regular annualised increases, or extraordinary charges
* Suppliers are required to give details of their account management structure and the composition of their customer service function
* Suppliers must identify the account manager who will be responsible for the day-to-day non-technical relationship with the University
* Suppliers should describe their typical approach to managing the University-supplier relationship, including any regular expectations for meetings, communications, or other interactions

## 6.7 Costs

* Please describe your licensing model and provide annual costs based on agreed number of users of each type (to be defined in discovery sessions).
* Please provide a cost for implementation services. As part of this, please provide a breakdown of implementation days by type e.g. project management, training, configuration, data migration, testing) so it is clear what services are covered as part of implementation.
* Please explicitly state the cost of each integration.
* Full provide details of the support cost model, including any regular annualised increases, or extraordinary charges.
* You can use the ‘Costing’ tab on the solutions requirements sheet to provide these details

## 6.8 System Integrations

* Describe in detail your approach to satisfying the integration requirements set out in the requirements document (Note: it is expected that suppliers will use discovery sessions to obtain the details they need regarding these integrations).

## 6.9 Sector References

* Provide details of three relevant reference sites where the proposed solution has been in use for a minimum period of six months. A concise description of the business and solution in use should be given. Sites should be chosen for their similarity in size, geographical presence, scope and complexity to the University.
* Reference sites should include one example of an implementation where significant challenges, problems or issues have been faced. Details of these challenges and the means by which they were overcome or mitigated should be provided.
* Please provide contact details so that references can be followed up. We will not contact people without notifying you in advance.

# 7 Solution Requirements

During interviews and reviews of business processes with key personnel, information has been collected and collated to produce a specification of requirements, which should be met by the proposed software solution. Bidders’ responses to these requirements will be reviewed against the attached Solution Requirements spreadsheet.

This specification of requirements has been attached in the spreadsheet ‘Solution Requirements.xlsx.’ Each bidder replying to the ITT is required to respond to each row in the tabs of this spreadsheet document.

Cells in the tabs on the attached spreadsheet require a response to each of the requirements. The options are either:

* + Standard Functionality
  + Requires Customisation
  + Not supported

Only one answer can be entered across each requirement.

If the response to a requirement is ‘Not supported’ then we would encourage suppliers to indicate in the ‘Description Notes’ whether the functionality can be provided using a third-party solution or if it is on the product roadmap (please provide timescales).

Suppliers are encouraged to provide any supporting notes to requirements which are not standard to the solution.