# Invitation to Tender – Human Resources Information System Ref. OPSD/HRIS/Nov2023

# Summary

WFD procured our current HR Information System in 2019, the organisation is now re-tender the contract to ensure WFD has the right solution that best suits our current and future needs and provides good value for money for the next 4 years. We are therefore looking to receive proposals for HRIS solutions that meet our current compliance, information management and reporting needs and that be easily modified and grown in the future without requiring extensive re-configuration or development.

# Overview

Westminster Foundation for Democracy (“**WFD**”) is the UK public body dedicated to supporting democracy around the world. Operating internationally, WFD works with parliaments, political parties, and civil society groups as well as on elections to help make political systems fairer, more inclusive and more accountable.

. We are a problem-solving, practitioner-led organisation that offers:

* High quality and impactful regional and country programmes that directly support the full spectrum of institutions in political systems to develop inclusive political processes, more accountable political systems, protection of rights and freedoms, and more pluralistic societies;
* Specialist analysis, research, and advice to inform UK policy makers on a range of democratic governance issues through our Centre of Expertise; and
* International elections observation on behalf of the UK.

# Aim of this Invitation to Tender

WFD is publishing this open Invitation to Tender (“**ITT**”) and offering potential suppliers of relevant solutions the opportunity to submit a **bid** for this contract. WFD is seeking a configurable software as a service (SAAS) solution.

WFD has an existing HRIS system used for employee record management, absence and leave management, workflow integration, employee self-service, performance management and learning and development. Therefore, the organisation is now re-tender the contract to ensure WFD has the right solution that best suits our current and future needs and provides good value for money for the next 4 years. The successful supplier would be engaged for a period of 4 years with a rolling annual break clause, and if relevant, manage a successful transition from its current HRISto the new platform with minimum disruption.,

The HR system will be rolled out to a total of 180 - 250 employees (self-service) and up to 10 HR-users in varying locations globally.

# Bid submission

All bids should be in a format that complies with the requirements of this ITT.

Bids should be submitted by email to: Jon Spence, People and Culture Director, at jon.spence@wfd.org. We recommend that bids are submitted in PDF format where possible, except spreadsheets.

Bids should refer clearly to the ITT reference number: OPSD/HRIS/Nov2023.

Should you require any further information or clarifiation on this ITT, please contact Jon Spence, People and Culture Director, at jon.spence@wfd.org.

By submitting a bid, you agree to comply with WFD’s standard terms and conditions for tendering and key policies, which are found [here](https://www.wfd.org/policy/wfd-general-terms-and-conditions-tendering), and WFD’s [Code of Conduct](https://www.wfd.org/policy/code-conduct).

# Detailed Specification

## Objective

WFD wishes to secure a contract with a supplier for the provision of the HR System (SAAS) solution.

In the event of a change from our current supplier, WFD would also require the following related services:

* Transition from current HRIS system (if applicable)
* training and implementation;
* post-implementation support and warranty; and
* on-going development of the system and on a non-exclusive basis, as called off, additional functionality that maybe required over the term of the contract

All relevant costs associated with the transition (i.e. initial setup and configuration) should be detailed in the bid document, and well as ongoing costs (licencing, maintenance and additional optional support).

The solution must have user friendly functionality and flexibility to adapt to future business needs.

## Scope of work

The solution will need to meet the following specification:

|  |  |
| --- | --- |
| **Functional area** | **Functionality required** |
| **Essential Requirements** |
| **Employee Record Management** | Employee Records to include:* Personal data: Title and Name, ,home address, e-mail, phone number, date of birth, age, gender, emergency contact/next of kin, bank details (international), NI number (or local equivalent)
* Equity, Diversity and Inclusion data (protected characteristics)
* Contract Start/End date
* Contract/employment status (permanent/fixed term/contractor/temp)
* Contracted hours (full time / part time)
* Job Title and job history
* Job grade/level
* Job location (international)
* Salary (and salary history) (multi-currency)
* Allowances (health insurance, accommodation, travel, terminal gratuity)
* Annual leave and public holidays entitlement
* Line Manager / Team / department
* Probation period (length and end date)
* Notice period
* Pension scheme details
* Trade Union membership
* Professional qualifications/expertise/specialisms
* Languages spoken
* Key benefits
* Key dates (e.g. Maternity/Paternity leave, temporary promotion, end of fixed term contract)
* Other deductions (e.g. Season ticket loan)
* Record of performance rating and bonuses
* Right to work information and documentation
 |
| **Absence and Leave Management** | * Self-service leave requests
* Leave/Sickness record
* Annual leave calculator
* Self-service TOIL tracking
* Absence documentation storage (i.e. fit for work certificates, maternity documents, etc.)
 |
| **Workflow integration and reminders** | * Easily configurable workflow to integrate business processes (e.g. Annual leave request/authorisation)
* Reminders for key dates (via e-mail and in-app to both line managers and HR team)
* Automated workflows, including induction tasks notifications, Line Manager/staff promption (e.g. exit interviews, probation reviews, new starter/leaver line manager notifications).
 |
| **Employee self-service** | * Booking annual leave
* Amend own contact details (and alert HR team of change)
* Line Managers can use the system to record sickness absence and complete actions such as end of probation review, and record absence.
* Admin controls to set permissions around what information can be viewed/edited by Line Managers and Employees
 |
| **Performance Management** | * Record of annual appraisal date and ratings.
* Ability to create bespoke appraisal review template.
* Storage/record of prior year appraisal reviews

Optional additional self-service requirements:* Objective setting and performance monitoring (i.e. 121 meeting notes)
* Requesting and submitting 360 degree feedback
* Learning and development records (e.g. course, time, cost of course etc.) - linked to L&D section in database
 |
| **Learning and Development** | * Learning and development records (e.g. course, time, cost of course etc.)
* Professional development record (i.e. CPD)
* Training request form
 |
| **Employee Relations/Case Management** | * Managing, tracking and recording internal complaints and employee relations cases (e.g. disciplinary and grievance; in particular where complaints are active or a sanction has been issed to an employee (e.g. written warning on file until ‘certain’ date)
* Performance improvement plan record
 |
| **Document Storage and Management** | * Secure storage functionality for employee documents, including Microsoft Office (and Outlook) file and images
* Issuing of employment letters/contracts for digital signatures
 |
| **Reporting** | The ability to run reports, both standard and customised, on all employee data, stored in the system. For example:* Salaries
* Starter and leavers
* Equity, diversity and inclusion data
* Staff Turnover
* Staff Absence
* L&D information / data (e.g. courses, numbers of days training, etc)
* Performance Appraisals
* Reports on ‘actions’ (e.g. end of contracts, end of probation, end of maternity leave, etc)
* Other metrics
 |
| **Recruitment Management** | * Track applications from Advert to On-boarding
* Alert notification of closing date
* Interact with candidates through uploading of documents, emails, job alerts
* Enable candidates to upload CVs / cover letters to the system and respond to bespoke application questions
* Organise candidate profiles/applications based on vacancy (reference)
* Ability to allow controlled access for hiring managers and others to view applications (only access relevant information not whole database)
* Ability to allow hiring managers to communicate with candidates. i.e. arrange interviews
* Reports on recruitment metrics e.g. time to hire, sourcing profile, and equity, diversity and inclusion data
* Issuing of offers/contracts and automated onboarding (i.e. referencing, right to work checks, etc.)
 |
| **Security and Business Continuity** | * Data should be encrypted and reside in UK data centres only and supplier should be fully GDPR compliant
* Native multifactor authentication (MFA) capability
* Single-sign-on integration with Microsoft Azure Active Directory
* Role-based permissions
* The successful bidder must be ISO27001 and Cyber Essentials accredited (preferable Cyber Essentials Plus).
* Winning bidder must have a Business Continuity Plan in place.
 |

The HR system will be rolled out to a total of 180 - 250 employees (self-service) and up to 10 HR-users in varying locations globally.

## Deliverables

* Provision of HRIS system that meets the requirements set out in this ‘scope of work’ section above for the duration of the contract period
* On-going development of the system and on a non-exclusive basis, as commissioned from time to time, additional functionality that maybe required over the term of the contract
* Post-implementation support (e.g. instructional materials/resources, technical support, etc.)
* Warranty

In the event of a change from our current supplier, WFD would also require the following related services (by 1 June 2024):

* Successful transition and secure managed data migration from current HRIS system (implementation plan to be included in the proposal)
* Training of staff on new system
* Implementation of new system

**Timeline**

Following completion of the procurement process, the contract will be signed with the successful supplier commencing 1 April 2024. The contract period will be 4 years, expiring 31 March 2028, with a rolling annual break clause option. In the event of the contract being offered to a new supplier, the transition (i.e. initial setup and configuration) will commence from 1April 2024, with an expectation to the system will be fully implemented and operational by 1 June 2024.

## Reporting

During onboarding (if applicable), minimum weekly touchpoint meetings with progress reports.

Thereafter, regular account management meetings will be required (at an interval to be agreed upon contracting).

## Working arrangements

It is expected that the contract will primarily be delivered remotely on the supplier’s premises. Occasional travel to WFD’s Central London office may be required, for example, during onboarding or for account relationship meetings.

## Payments

The below table sets out WFD’s payment expectations. Please note that we operate 30-day payment terms.

|  |  |
| --- | --- |
| **Activity** | **Payment arrangements**  |
| **Onboarding** **(if applicable)** | Full cost is to be paid on completion of onboarding, to be determined at WFD’s sole discretion.  |
| **Licenses** | To be billed annually, upon successful completion of onboarding period. |

# Bid process

## Timescale

Below is the proposed timescale for the tendering process. Please note the dates are indicative and subject to change.

|  |  |
| --- | --- |
| Description | Date |
| Issue ITT | 20 November 2023 |
| Deadline for supplier questions | 8 December 2023 |
| Closing date for receipt of completed tender proposals[[1]](#footnote-2) | 15 December 2023 |
| Shortlisting of bids | 18 December 2023 –12 January 2024 |
| Supplier interviews/presentations to selection panel (if applicable) | 15-19 January 2024 |
| WFD announces preferred supplier | 1 February 2024 |
| Contract finalised and signed | February 2024 |

## Bid requirements

In general, the bid should include the following:

1. Organisational profile
2. Proposed solution and how it meets the specification
3. Financial proposal
4. References
5. Confirmation of compliance with General Terms and Conditions of Tendering

### Organisational profile:

* Company profile, including brief history and financial overview
* Case studies/credentials demonstrating relevant experience and skills profile
* Names and brief biographies of key staff

WFD is particularly keen to receive bids from organisations which are – or are working towards becoming – living wage employers and that have a broadly representative and balanced Board from gender and ethnicity perspectives.

### Proposed solution:

* Clear explanation as to the proposed approach to meeting the specification set out in this ITT.
* Detailed project plan (for any implementation and migration), including timelines, assumptions and dependencies, resourcing and risks.

### Financial proposal:

* Full breakdown costings for the implementation process (if any) and the proposed HRIS solution (e.g. license fees) in GBP sterling
* Separate accounting of VAT and/or any other applicable tax, duty, or charge.
* Detailing of any discount applied in view of WFD’s not-for-profit status.

### References:

* The bid should include details of two references relating to similar goods/services provided in the last three years. Please note – referees will only be contacted once Preferred Bidder status is assigned.

### Confirmation of acceptance of General Terms and Conditions of Tendering:

* All bidders will be deemed to have accepted the WFD Terms and Conditions of Tendering and confirmed their compliance.

All bidders should also note the following:

* all bids should be submitted in English;
* all bids should be submitted in electronic form only;
* this ITT and the response may be incorporated in whole or in part into the final contract;
* only information provided in response to questions set out in this documentation will be taken into consideration for the purposes of evaluating the ITT;
* bids which are poorly organised or poorly written, such that evaluation and comparison with other submissions is notably difficult, may exclude the bidder from further consideration; and
* any bids which do not fully comply with the requirements of this ITT may be disregarded at the absolute discretion of WFD.

## Evaluation criteria

WFD intends to shortlist providers based on their response to the ITT and will use the following scoring criteria.

|  |  |
| --- | --- |
| Description | Score  |
| Fit to Specification (including quality of implementation and user onboarding plan if relevant) | 50 % |
| Value for money of solution and support package[[2]](#footnote-3) | 30 % |
| References/ Relevant Client testimonials | 20% |
| **Total Weighting** | **100 %** |

WFD will score each criterion using the following table:

|  |  |
| --- | --- |
| 0 | The proposal submitted omits and fundamentally fails to meet WFD’s scope and specifications. Insufficient evidence to support the proposal to allow WFD to evaluate. **Not Answered**  |
| 1 | The information submitted has a severe lack of evidence to demonstrate that WFD’s scope and specifications can be met. Significant omissions, serious and/or many concerns. **Poor** |
| 2 | The information submitted has some minor omissions in respect of WFD's scope and specifications. The tender satisfies the basic requirements in some respects but is unsatisfactory in other respects and raises some concerns. **Satisfactory**.  |
| 3 | The information submitted provides some good evidence to meet the WFD’s scope and specifications and is satisfactory in most respects and there are few concerns. **Good.**  |
| 4 | The information submitted provides good evidence that all of WFD's scope and specification can be met. Full and robust response, any concerns are addressed so that the proposal gives confidence. **Very Good.** |
| 5 | The information submitted provides strong evidence that all of WFD's scope and specification can be met and the proposal exceeds expectation i.e. exemplary in the industry. Provides full confidence and no concerns. **Outstanding** |

## Tender Queries

Any questions related to this tender should be addressed to Jon Spence, People and Culture Directorat*procurement@wfd.org**.*

## Equal Information

Should any supplier raise a question that is of general interest, WFD reserves the right to circulate both question and answer to other respondents, either via WFD’s website or by email. In this event, anonymity will be maintained.

## Annual reports

Please provide a link or copy of your company’s latest audited annual accounts with the bid.

## Other information

If the potential supplier believes that there is additional information that has not been requested in the ITT but is relevant to your bid, please include that information as a separate attachment and explain its relevance to this ITT.

1. WFD may at its discretion extend the closing date and time for receipt of bids. [↑](#footnote-ref-2)
2. Value for Money - This is not to be confused with the cheapest option. Value for Money can be defined using 3 points: Economy – best value, Efficiency – maximising outputs, Effectiveness – outputs deliver the desired outcome(s) [↑](#footnote-ref-3)