**Automated Testing of the Salesforce platform in use at the Fund**

**Organisation National Lottery Heritage Fund**

**Department** Business Delivery

**Title of procurement Salesforce Automated Testing Procurement**

**Brief description of supply** The Heritage Fund is seeking to identify a supplier who can provide a tool for automated testing of the Salesforce platform in use as an investment management service at the Fund. This includes the sandbox environments as well as production.

**Estimated value of tender** up to £50,000

**Estimated duration** 1 month for initial process

**Name of NHMF Contact** Jamie McGarrigle

**Timetable** Response deadline: 1st November 2021 at Noon

Clarification & Negotiation meetings: clarification questions by the 7th October 2021 and tender answers on the 12th October 2021

Confirmation of contract: 5th November 2021

# 1. Overview

* 1. The National Lottery Heritage Fund is the single largest funder of heritage projects in the UK. Since our inception in 1994 we have distributed grants amounting to £8 billion across 44,000 projects.
  2. In 2019 we launched a Strategic Funding Framework which set a new vision and role for our organisation. Between now and 2024, all our work should fit with our new role of:

‘inspiring, leading and resourcing the UK’s Heritage to create positive and lasting change for people and communities, now and in the future’.

* 1. NHMF invests in the full breadth of the UK’s heritage and, through our funding, we aim to make a lasting difference for heritage and people. This is reflected in the outcomes for heritage, people and communities which underpin our grant-making.
  2. The Fund is currently delivering a new Investment Management System to replace legacy systems. This will also include migration of data (structured and unstructured) from these legacy systems to the new system. The system is used for pre application, assessment, monitoring and ensuring contractual compliance and providing data to evidence impact. It is predominantly a tool for case management within Business Delivery however the outputs are used within the Business Insight and Innovation part of the business. The tool is managed by an in house team.
  3. The project’s objective is to provide a tool that enables automated testing of the Salesforce platform once changes are made to it by the in house developer team. Currently this is a manual process which is time consuming for the team.
  4. The new IMS went live April 2021 for all new applications. All required data must be migrated from live cases by March 2022 and this will create new workflows and structures within the service.
  5. This invitation to bid is for a contractor who can:
* Provide a Salesforce Specific test solution that is automated and maintainable.
* This must be a low code solution that is easy to use.

*Aims and objectives*

* 1. The aim of this ITT is to identify a tool that supports the automated testing of the Salesforce solution in use at the Fund.
  2. The objectives are to:
* Deliver a tool that enables testing.
* Enable the Fund to understand the licensing approach and full lifecycle cost of the tool
* Ensure users of the tool are able to deploy and manage the tool.

# Outputs & Timescales

2.1 The main output will be a new tool in use as part of the Salesforce solution at the Fund that is easy to use and maintain.

# Contract management

* 1. The Fund will consider bids of up to £50,000 maximum, to include all expenses and VAT. The contract will be let by the National Heritage Memorial Fund (NHMF).
  2. We will be looking for a three year contract paid for on an annual basis.
  3. The contract will be based on the NHMF standard terms and conditions.
  4. The research will be managed on a day-to-day basis for NHMF by Jamie McGarrigle, Product Owner

# Award Criteria

* 1. A proposal for undertaking the work should include:
* a detailed description of the tool being proposed
* details of experience of the contractor in carrying out similar projects. A lead contact should be identified;
* the annual cost of the tool;
* a breakdown of the licensing model and any other aspects included within this cost;
* documentation relating to the tool proposed including how it is to be integrated, used and maintained;
* a description of how staff at the Fund can train themselves in using the tool.
  1. Your Bid will be scored out of 100%.

**70% of the marks will be awarded to Quality**

Each question will be scored using the methodology in the table below.

Tender responses submitted will be assessed by NHMF against the following Quality Questions, which will be weighted equally when scored:

1. To what extent does the tender response demonstrate an understanding of the issues related to this brief?
2. What is the extent does the tenderer have experience of similar projects and/or best practice and standards?
3. How well the tender indicates that the solution is able to deliver the required tool to the budget and timetable required by the Fund?

## Quality Questions scoring methodology

| Score | Word descriptor | Description |
| --- | --- | --- |
| 0 | Poor | No response or partial response and poor evidence provided in support of it. Does not give the NHMF confidence in the ability of the Bidder to deliver the Contract. |
| 1 | Weak | Response is supported by a weak standard of evidence in several areas giving rise to concern about the ability of the Bidder to deliver the Contract. |
| 2 | Satisfactory | Response is supported by a satisfactory standard of evidence in most areas but a few areas lacking detail/evidence giving rise to some concerns about the ability of the Bidder to deliver the Contract. |
| 3 | Good | Response is comprehensive and supported by good standard of evidence. Gives the NHMF confidence in the ability of the Bidder to deliver the contract. Meets the NHMF’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the NHMF a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the NHMF’s requirements in some respects. |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the NHMF a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the NHMF’s requirements in most respects. |

**30% of marks will be awarded for Price.**

The evaluation of price will be carried out on the Schedule of charges you provide in response to **Table A**

## Price Criterion at 30%

* 30 marks will be awarded to the lowest priced bid and the remaining bidders will be allocated scores based on their deviation from this figure. Your fixed and total costs figure in your schedule of charges table will be used to score this question.
* For example, if the lowest price is £100 and the second lowest price is £108 then the lowest priced bidder gets 30% (full marks) for price and the second placed bidder gets 46% and so on. (8/100 x 30 = 2.4 marks; 30-2.4 = 27.6 marks)
* The scores for quality and price will be added together to obtain the overall score for each Bidder.

## Table A - Schedule of Charges

Please show in your tender submission, the annual cost of licenses and what is included within this.

Please complete the table below providing a detailed breakdown of costs against each capitalised description, detailing a total and full ‘Firm Fixed Cost’ for each element of the service provision for the total contract period. Bidders may extend the tables to detail additional elements/costs if required.

VAT is chargeable on the services to be provided and this will be taken into account in the overall cost of this contract.

As part of our wider approach to corporate social responsibility the National Heritage Memorial Fund/National Lottery Heritage Fund prefers our business partners to have similar values to our own. We pay all of our staff the living wage (in London and the rest of the UK) and we would like our suppliers and contractors to do likewise. Please highlight in you proposal/tender/bid whether you do pay your staff the living wage.

Bidders shall complete the schedule below.

## Table A - Pricing

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Delivery Elements** | **Annual Cost of a Service or License** | **Cost per day of a**  **Consultant** | **One Off Cost of a Service or Product** | **Total line Cost (ex VAT)** |
| **EXAMPLE**  Implementation & Testing | 0 | £500  £300 | £3000 | £8000. |
| Annual Support Service | £800 |  |  | £800 |
| Cloud Hosting for 2 years | £500 |  |  | £1000 |
| Environment Set-Up and System Configuration |  |  |  |  |
| Cost of Annual Customer Support Service |  |  |  |  |
| Cost of technology (licenses) |  |  |  |  |
| Cost of detailed technical implementation support per day. |  |  |  |  |
| Cloud/ Hosting Services for three years |  |  |  |  |
| Maintenance and Support for three years |  |  |  |  |
| Training |  |  |  |  |
| **Sub-TOTAL (ex VAT)** |  |  |  |  |
| Licensing Arrangement (including identification of any volume-banded discounts) |  |  |  |  |
| **TOTAL (ex VAT)** |  |  |  |  |

Within your response to the above table please also:

* Note that payment will be made in instalments upon satisfactory completion of specific stages of contract delivery. Please allocate a cost to each phase of delivery of the solution and target completion date based on the requirements outlined within Schedule 2
* Outline any assumptions you have made when providing the above costs
* Confirm the rate card on latest G-CLOUD
* is still accurate
* Confirm any additional features or development work which will be charged using the rate card if not captured above
* Provide a break-down of any individual rates comprised within the total cost and the associated individual roles as applicable for the Fund’s understanding

Prices submitted should be fully inclusive (excluding VAT & in GBP), fixed, current and not subject to variation. Price is defined as the total contract value, which includes the cost of the services over the term of the contract.

Arithmetic will be checked and if any errors are found, the supplier will be notified and requested to confirm or amend the submission accordingly.

Price elements of responses will be evaluated against the lowest Service Cost. The service offering which relates to the best (lowest) Service Cost will be awarded the maximum score available. All remaining submissions will be scored relative to the lowest Service Cost using the following series of calculations and formulas.

Please attach your response via the Fund eSourcing Platform within the Commercial Section. The pricing element will account for 30% of the evaluations.

## Table B - Technical criteria and their associated weightings

|  |  |
| --- | --- |
| **Technical Scoring Criteria for Selection of Provider Scored Criterion** | **Weighting** |
| Maintenance and Support availability Yes is a PASS No is a FAIL | Pass/Fail |
| System Functionality | 75% |
| Implementation | 15% |
| Product Roadmap and Future Developments | 10% |

***Notes:* NHMF reserves the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low quality response. NHMF also reserves the right to amend the timetable of work where required.**

*You should not submit additional assumptions with your pricing submission. If you submit assumptions you will be asked to withdraw them. Failure to withdraw them will lead to your exclusion from further participation in this competition.*

# Procurement Process

* 1. NHMF reserves the right to reject abnormally low scoring tenders. NHMF reserves the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.
  2. The procurement timetable will be:

The procurement timetable will be:

* Deadline for clarification questions: 7th October 2021
* Tender return deadline: NOON 1st November 2021
* THE FUND will notify bidders of our procurement decision **by 5th November 2021**
* \*THE FUND will respond to clarification questions and send the answers to the organisations that have been sent the tender. Please note that we will make the questions anonymised and our response to them will be available to everyone on our website.
* \*\*We reserve the right to carry out clarifications if necessary; these may be carried out via email or by inviting bidders to attend a clarification meeting.
  1. Your tender proposals must be sent electronically via e-mail before the tender return deadline of NOON 1st November 2021 to the following contact:

**Jamie McGarrigle**

[**Jamie.Mcgarrigle@heritagefund.org.uk**](mailto:Jamie.Mcgarrigle@heritagefund.org.uk)

* 1. Please visit the [NHMF website](http://www.hlf.org.uk/Pages/Home.aspx) for further information about the organisation.

# Appendix A: Accessibility and formatting guidance

NHMF is committed to providing a website that is accessible to the widest possible audience. Our website is annually tested by accessibility auditors and we must meet the WCAG 2.0 AA compliance level. Our accessibility testing covers all of our content, including downloadable documents, as well as the design and functionality of the site.

Reports and other documents created for NHMF (**including the tender submissions**) need to be clear, straightforward to use, and ready to circulate internally, externally and online, as well as suitable for use by screen reading software. Tips for creating accessible documents can be found below. However, we strongly recommend referring to the RNIB, Gov.uk and WebAIM for more detailed information.

## Readability

In the final report, and all other documents that may be published online including the tender application consultants should ensure that:

* The size of the font is at least 11pt;
* There is a strong contrast between the background colour and the colour of the text. Black text on a white background provides the best contrast. This also applies to any shading used in tables and/or diagrams;
* Italics are only used when quoting book titles for citations and items on the reference list should be arranged alphabetically by author
* Colour formatting and use of photos should be of a resolution size that is easily printable and does not compromise the printability of the document.

For further guidance on ensuring readability of printed materials, please refer to the RNIB Clear Print guidelines. These can be found on the [RNIB website](http://www.rnib.org.uk/Pages/Home.aspx).

## Accessibility

Reports should adhere to the following guidelines:

### Formatting

Headings and content in your document should be clearly identified and consistently formatted, to allow easy navigation for users. Heading Styles should be used to convey both the structure of the document and the relationship between sections and sub-sections of the content.

### Spacing

Screen readers audibly represent spaces, tabs and paragraph breaks within copy, so it is best practice to avoid the repetitive use of manually inserted spaces. Instead, indenting and formatting should be used to create whitespace (e.g., use a page break to start a new page, as opposed to multiple paragraph breaks).

### Alternative text

Alt text is additional information for images and tables. This extra information is essential for both document accessibility (screen reading software reads the Alt text aloud) and for the web. Alt text should be concise and descriptive, and should not begin with ‘Image of’ or ‘Picture of’.

### Images

These should be formatted in-line with text, to support screen readers. Crediting pictures may be necessary, usually in response to a direct request from a third party.

### Tables

These should be for used for presenting data and not for layout or design. They should also be simple, and include a descriptive title.

### Additional documents

Any additional information, separate to the report, for example proformas and transcripts which may be used as standalone documents must be fully referenced to the piece of work being submitting and therefore dated, formatted and numbered appropriately.

### Acknowledgement

All reports should acknowledge NHMF. Our logo can be found on the [NHMF website](http://www.hlf.org.uk/grantholders/acknowledgement/Pages/Logosandacknowledgement.aspx).

### Further resources

Please refer to the links below for further information:

* ['Microsoft Word: creating accessible documents' - webaim.org](http://webaim.org/techniques/word/)
* ['How to create an accessible PDF' - GOV.UK](https://www.gov.uk/guidance/how-to-publish-on-gov-uk/accessible-pdfs)

We also recommend using an accessibility consultant to help you produce your reports. Agencies that NHMF have worked with include [Shaw Trust](http://webacc.shaw-trust.org.uk/) and [The Accessible Digital Documents Company](http://www.accessible-digital-documents.com/).

NHMF retains the right to amend documents in order to create accessible versions for publishing.