**Invitation to Tender**

**Title:** Integrated Grants Management, Financial Management, Human Resource Management, Procurement Management, and Inventory System

**Project:** FIN001-SYSTEMS2023

**Date:** 18th of July 2023

**Procurement:** Lester Demmer

**Owner: Finance:** Susan Williams

**Client:** The Pirbright Institute

Table of Contents

[1.Tender Checklist 4](#_Toc135910673)

[2.Tender Acknowledgement 5](#_Toc135910674)

[3.Mandatory Functional Criteria 6](#_Toc135910675)

[5.Demonstration Criteria 8](#_Toc135910676)

[5.1 Demonstration Agenda 9](#_Toc135910677)

[5.2 Demo Scripts 10](#_Toc135910678)

[6.Evaluation Criteria 11](#_Toc135910679)

[6.1 Workflow 11](#_Toc135910680)

[6.2 Business Rules 11](#_Toc135910681)

[6.3 User Interface & Usability 11](#_Toc135910682)

[6.4 Integration 11](#_Toc135910683)

[6.5 Application Security and Data Access 11](#_Toc135910684)

[6.6 Audit Trail and Forensics 12](#_Toc135910685)

[6.7 Management Information Reporting 12](#_Toc135910686)

[6.8 Technology Roadmap 12](#_Toc135910687)

[6.9 Agility & Ease of Change 12](#_Toc135910688)

[6.10 Ability to Manage Two Types of Terms and Conditions 12](#_Toc135910689)

[6.11 Requirements Specification 14](#_Toc135910690)

[6.12 System Architecture 14](#_Toc135910691)

[6.13 Authorisation 14](#_Toc135910692)

[6.14 Data Migration Approach 14](#_Toc135910693)

[6.15 Estimated Hardware / Infrastructure Requirements 14](#_Toc135910694)

[6.16 Understanding of Requirements 15](#_Toc135910695)

[6.17 Deliverables and Methodology 15](#_Toc135910696)

[6.18 Documentation Approach 15](#_Toc135910697)

[6.19 Testing / Quality Approach 15](#_Toc135910698)

[6.20 Software Support Proposed 15](#_Toc135910699)

[6.22 Team Structure and Rationale 16](#_Toc135910700)

[6.23 Project Resourcing 16](#_Toc135910701)

[6.24 Training Approach & Knowledge Transfer 16](#_Toc135910702)

[6.25 Project Plan 17](#_Toc135910703)

[6.26 Disaster Recovery 17](#_Toc135910704)

[6.27 UAT 17](#_Toc135910705)

[7. Pricing Criteria 18](#_Toc135910706)

[7.1 Software Pricing 18](#_Toc135910707)

[7.2 Solution / System Implementation Pricing 18](#_Toc135910708)

# 1.Tender Checklist

Tenderers should ensure that all the requested information is provided as part of their submission.

Failure to provide the requested information may result in a submission not being evaluated by the Institute.

Please do not include appendices or provide additional information other than outlined below.

|  |  |  |
| --- | --- | --- |
|  | **Information Type** | **Yes / No** |
|  | **One** Electronic copy of your **Tender Reply** |  |
|  | Signed and Dated **Tender Acknowledgement** (Section 2) |  |
|  | Completed **Mandatory Functional Criteria** Questions (Section 3) |  |
|  | Completed **Mandatory Non-Functional Criteria** Questions (Section 4) |  |
|  | Completed **Evaluation Criteria** Questions (Section 6) |  |
|  | Completed **Requirements Specification** **Document** (Section 6.11) |  |
|  | Completed **Software Pricing Document** (Section 7.1) |  |
|  | Completed **Solution / System Implementation Pricing Document**  (Section 7.2) |  |

# 2.Tender Acknowledgement

Enclosed with this document, is our tender, which comprises the responses required as set out in the Invitation to Tender (ITT). We, the undersigned, acknowledge that if our tender is accepted by the Institute either in whole or in part, this is subject to contract and will not be binding on the parties until the parties have entered a signed contract.

We certify that this is a bona fide tender, intended to be competitive and that we have not fixed or adjusted the amount of the tender or the rates and prices quoted by or under or in accordance with any agreement or arrangement with any other person.

We certify that we have not done, and undertake that we will not do at any time any of the following acts:

1. Communicate to a person other than the Institute the amount or approximate amount of our proposed tender (other than in confidence to obtain quotations necessary for the preparation of the tender; or
2. Enter into any agreement or arrangement with any other person that he/she shall refrain from tendering or as to the amount of any tender to be submitted; or
3. Offer or agree to pay or give, or pay or give, any sum of money, inducement, or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the requirement any act or omission of the sort described above.

We certify that we have not canvassed any member of the Board or any employee of the Institute in connection with this tender, and that no person employed by us, or acting on our behalf, will undertake any such action.

In this document the word ‘person’ includes any person and anybody or association, corporate or incorporate. The words ‘any agreement or arrangement’ include any such transaction, formal or informal, whether legally binding or not.

We understand that you are not bound to accept the lowest of any tender you may receive and that you reserve the right to accept all or part of a tender.

We understand that we tender at our own expense. We acknowledge that the information contained in the ITT is confidential.

We have undertaken all necessary steps and due diligence to ensure that we are fully familiar with the nature and extent of the obligations to be accepted by us if we enter a contract with the Institute, and that we have obtained all information necessary for submitting our tender and entering a contract.

**Declaration of Compliance:**

|  |  |  |
| --- | --- | --- |
|  | **Company name:** |  |
|  | **Address:** |  |
|  | **Signatory:** |  |
|  | **Name and title:** |  |
|  | **Date:** |  |

# 3.Mandatory Functional Criteria

Please highlight the answer which applies (YES/NO). Suppliers may be requested to evidence or demonstrate capabilities to substantiate answers to these mandatory questions.

|  |  |
| --- | --- |
| **Interface Configuration:** Can the software proposed meet interface configuration requirements for the following interface types?   * Structured text over HTTPS, e.g., XML, CSV * Database Integration – Read/Write to ODBC data source | YES/NO |

|  |  |
| --- | --- |
| **Security Roles:** Can the software proposed enable the configuration of role-based security requirements (i.e., enabling access to “screen level” functionality and specific data properties and database level access to data properties for user groups and specific user roles) at both functional and database level based on configuration out of the box capabilities only, without the need for coding? | YES/NO |

|  |  |
| --- | --- |
| **Workflow:** Can the software proposed enable the definition of a specific business process and associated work routing, based only on configuration out of the box capabilities without the need for coding? | YES/NO |

|  |  |
| --- | --- |
| **Business Rules:** Can the software proposed meet the definition of specific business rules (e.g., automated decisions based on the value of specific data properties or a combination of the same) based on configuration out of the box capabilities only, without the need for coding? | YES/NO |

|  |  |
| --- | --- |
| **Grants Module:** Does the software / solution proposed can allocate specific users to two or more projects and split their salary across different project budgets? | YES/NO |

|  |  |
| --- | --- |
| **Data Access:** Does the software proposed enable the extraction / export of data either at database level or via user generated reports to excel or another file format? | YES/NO |

|  |  |
| --- | --- |
| **Mobile Device Support:** Does the software proposed provide a user interface that enable users to work on different device forms (such as mobile phones, tablets, desktop personal computers) | YES/NO |

|  |  |
| --- | --- |
| **Audit Trail:** Does the software proposed provide the capability to record an audit trail of all user actions enabling date/time stamp and action taken, based on out of the box capabilities, without the need for coding? | YES/NO |

|  |  |
| --- | --- |
| **Table / Field Configuration:** Does the software proposed provide the capability to configure tables / fields? | YES/NO |

|  |  |
| --- | --- |
| **Data Migration and Integration:** Does the supplier have demonstrable experience of delivering ERP solutions with a significant data migration element? | YES/NO |

|  |  |
| --- | --- |
| **Hosting:** Does the software proposed provide the capability to be hosted in the UK or EU only? | YES/NO |
| **Hosting:** Is it private hosted? | YES/NO |

|  |  |
| --- | --- |
| **Hosting:** Is the data collocated? | YES/NO |

|  |  |
| --- | --- |
| **Hosting:** Is there a comprehensive cybersecurity policy? | YES/NO |

4.Mandatory Non-Functional Criteria

Please highlight the answer which applies (YES/NO). Suppliers may be requested to evidence or demonstrate capabilities to substantiate answers to these mandatory questions.

|  |  |
| --- | --- |
| **Remote Access:** Is the software and solution proposed accessible remotely? | YES/NO |

|  |  |
| --- | --- |
| **Microsoft Windows:** Is the software and solution proposed compatible with Microsoft Windows 10 (our current desktop platform) and above? | YES/NO |

|  |  |
| --- | --- |
| **Internet Browser:** Is the solution compatible with Microsoft Edge (Chromium) (where browser-based access is the access method)? | YES/NO |

|  |  |
| --- | --- |
| **Software:** Is the software proprietary to the supplier? | YES/NO |

# 5.Demonstration Criteria

Tenderers will be required to provide a presentation / solution demonstration of their bid in the week commencing 5th to the 7th September 2023. Tenderers shall ensure that they have the available resources to present during this timeframe.

Tenderers will be required to provide a demonstration of the proposed software product(s) based on the demo scripts provided. The aim of the demonstration is to reiterate the Tenderers proposal, provide a concrete demonstration of the demo scripts provided and provide opportunity for further dialogue and clarification regarding the same. The Institute reserves the right to make changes to the demo script and if made, will be communicated to Tenderers.

Tenderers shall ensure that they have the available resource to present during these weeks at their allotted date and time. Tenderer’s team in attendance should consist of presenter(s), technical expert, and main sales / business contact only.

The Institute’s evaluation team in attendance will consist of members from the business, technical and project implementation functions of the Institute.

The presentation will take a maximum of four hours 20 minutes. The Institute reserves the right to ensure strict adherence to the agenda timings. The agenda is shown on the next page, though the Institute reserves the right to modify as required.

It would be helpful if you could email electronic copies of all presentation material used within 24 hours of their presentation to [pirbrighttenders@pirbright.ac.uk](mailto:pirbrighttenders@pirbright.ac.uk).

## 5.1 Demonstration Agenda

|  |  |
| --- | --- |
| **Agenda** | **Maximum Time** |
| **Pirbright Institute Introduction**  Introduction to the Institute’s attendees | 5 minutes |
| **Tenderers Introduction**  Introduction to the Tenderers attendees and opening remarks | 5 minutes |
| **Demo Script 1**  Demonstration of the proposed solution highlighting how the solution meets the high-level requirements in the ITT but specifically covering the scenario detailed in Demo Script 1.  Both technical and functional questions will be asked throughout the demonstration. Please ensure a technical representative is present. | 2 hours  (Including questions) |
| **Demo Script 2**  Demonstration of the proposed solution highlighting how the solution meets the high-level requirements in the ITT but specifically covering the scenario detailed in Demo Script 2.  Both technical and functional questions will be asked throughout the demonstration. Please ensure a technical representative is present. | 2 hours  (Including questions) |
| **Close** | 10 minutes |

## 5.2 Demo Scripts

Please refer to Annexure A Demo Script document for details on Demo Script 1 and Demo Script 2.

In the demo scripts, the “Function” header refers to a department at the Pirbright Institute.

In the demo scripts the “System or External” header can be categorised as follows:

* System – an integral feature of the system
* External to system – not a feature of the system, the supplier will not need to show this as part of the demo script.

Please contact [procurement@pirbright.ac.uk](mailto:pirbrighttenders@pirbright.ac.uk). should you require further clarification regarding the demo scripts.

# 6.Evaluation Criteria

The following areas are all deemed key to the selected platform for the ERP solution based on the Institute’s specific requirements and future needs. On each of the following dimensions the extent to which the proposed software platform has comprehensive, proven capabilities in each of the following key areas which can be configured to meet business needs based on configuration of “out of the box” functions rather than custom development will be evaluated.

## 6.1 Workflow

Detail the workflow and business process management capabilities of the proposed software platform specifically describing how processes can be navigated based on either pre-defined rules or user discretion.

|  |
| --- |
| **Response:** |

## 6.2 Business Rules

Detail the capabilities of the proposed software platform to implement business rules in an intuitive and easy to change way.

|  |
| --- |
| **Response:** |

## 6.3 User Interface & Usability

Detail the capabilities of the proposed software platform to implement intuitive, simple user interfaces.

|  |
| --- |
| **Response:** |

## 6.4 Integration

Detail support for out of the box connectors / interfaces for web services, basic file integration and database interfaces. Please list all interface types supported out of the box.

|  |
| --- |
| **Response:** |

## 6.5 Application Security and Data Access

Detail out of the box capabilities enabling role-based security definition at screen/functionality level.

|  |
| --- |
| **Response:** |

## 6.6 Audit Trail and Forensics

Detail the out of the box capabilities pertaining to capture of audit trail of specific actions taken, by whom, when and what. Provide reference to standards if applicable (e.g., ISO 9001, ISO 17025, IFRS, FRS, UK GAAP). Provide detail of Forensic capabilities of systems (e.g., ability to flag if suppliers address and bank details is changed in the system and by whom).

|  |
| --- |
| **Response:** |

## 6.7 Management Information Reporting

Detail capabilities available to configure specific reports and to extract data from the software solution for offline analysis.

|  |
| --- |
| **Response:** |

## 6.8 Technology Roadmap

Provide an overview of the proposed technology platforms’ future roadmap and direction.

|  |
| --- |
| **Response:** |

## 6.9 Agility & Ease of Change

Detail the capabilities of the proposed software platform to enable changes to existing business processes, rules and user interface design based on available out of the box capabilities where possible.

|  |
| --- |
| **Response:** |

## 6.10 Ability to Manage Two Types of Terms and Conditions

Detail the capabilities of the proposed software platform to handle two types of Terms and Conditions, specifically for current employees under existing “BBSRC Terms and Conditions” and for new employees who will be employed under “The Pirbright Institute Terms and Conditions”. Changes affected will be in, but not limited to the following areas: Salaries; Annual Leave; Contracts; Sick Pay; Overtime; Allowances.

|  |
| --- |
| **Response:** |

## 6.11 Requirements Specification

Please complete the Requirements Specification document Annexure B indicating the degree the system is:

* Standard
* Standard with Configuration
* Bespoke
* Not Achievable

Column K - Please add comments on system capability or any assumptions you may have.

Column L - Please list your ERP “module” that handles the specific requirement.

## 6.12 System Architecture

Please provide a system architecture diagram, detailing clearly which hardware and software components will be used to deliver which architectural component. Include a narrative and detail all pertinent assumptions.

|  |
| --- |
| **Response:** |

## 6.13 Authorisation

Please provide an overview of how system authorisation will work, detailing clear authorisation routes for grants, procurement, finance, HR components. Include a narrative and detail all pertinent assumptions.

|  |
| --- |
| **Response:** |

## 6.14 Data Migration Approach

Describe the proposed approach to migrate data from the existing Access system, transform, and load into the target system. Specify all assumptions and specifically assumptions regarding environments available and tools required to perform the migration.

|  |
| --- |
| **Response:** |

## 6.15 Estimated Hardware / Infrastructure Requirements

Detail all estimated hardware requirements and any dependencies on desktop infrastructure.

|  |
| --- |
| **Response:** |

## 6.16 Understanding of Requirements

Describe your understanding of the Institutes high level requirements and how the proposed solution and delivery approach will deliver on these needs. This section should also be used to demonstrate desire to partner with the Institute to deliver success of the project based on understanding of the Institutes’ needs.

|  |
| --- |
| **Response:** |

## 6.17 Deliverables and Methodology

Describe the delivery method proposed and how this facilitates the development, sign-off, quality assurance and delivery of project deliverables.

|  |
| --- |
| **Response:** |

## 6.18 Documentation Approach

Describe the proposed approach to documentation of deliverables and project documentation and how the production, version control and timely sign off documentation will be facilitated. Describe all assumptions regarding tools and resources required.

|  |
| --- |
| **Response:** |

## 6.19 Testing / Quality Approach

Describe the proposed approach to quality assurance, testing and implementation with specific reference to quality gates applied and deliverables. Describe all assumptions regarding tools and resources required.

|  |
| --- |
| **Response:** |

## 6.20 Software Support Proposed

Summarise the proposed software support and maintenance approach detailing specific service levels and support processes and processes relating to maintenance releases.

|  |
| --- |
| **Response:** |

6.21 Warranty / Postproduction Support

Specify the proposed approach to postproduction support and the solution warranty period.

|  |
| --- |
| **Response:** |

## 6.22 Team Structure and Rationale

Specify the proposed project team structure and rationale for each team member, explaining how this will integrate and complement the Institute project team. Please state clearly where / if staff dependencies exist beyond the team specified.

|  |
| --- |
| **Response:** |

## 6.23 Project Resourcing

Please outline your proposed resourcing for the project, delineating roles, and responsibilities. Please provide a profile overview for the specific team members proposed based on the estimated project start date of no later than the 2nd January 2024.

|  |
| --- |
| **Response:** |

## 6.24 Training Approach & Knowledge Transfer

Please describe knowledge transfer approach proposed and specific training approach based on the requirements described.

|  |
| --- |
| **Response:** |

## 6.25 Project Plan

Tenderers are required to attach a proposed project plan document. Please also indicate number of supplier “days” dedicated to the various phases of the project.

|  |
| --- |
| **Response:** |

## 6.26 Disaster Recovery

|  |
| --- |
| **6.26.1 Is there a provision for a robust Disaster Recovery Process?** |
| *In the event of a system failure, we need to know how quickly services could be restored and what proof of system recovery is available through testing.* |
|  |

|  |
| --- |
| **6.26.2 Describe your solution to provide 99.995% uptime?** |
|  |
|  |

|  |
| --- |
| **6.26.3 How would you input into a Business Continuity Plan?** |
|  |
|  |

## 6.27 UAT

Specify the proposed approach to UAT, indicating the roles and responsibilities of supplier and Institute project team members.

|  |
| --- |
| **Response:** |

# 7. Pricing Criteria

## 7.1 Software Pricing

Please complete the ERP Software document Annexure C. This should be based on assumed user numbers and volumes as listed in the ITT Guidance Document. As a minimum, suppliers should provide pricing for two-year term licensing based on user numbers and volumes provided and three incremental one-year options. If the license model proposed differs from the annual charge approach implied, please specify. Please specify all assumptions associated with software pricing provided. Please specify if you provide academic pricing.

## 7.2 Solution / System Implementation Pricing

Please complete the Solution / System Implementation document Annexure D. This should be consistent with the resource / project plan provided.

ANNEXURES

SQ Selection Questionnaire

Demo Script 1 and 2 Annexure A

Requirements Specification document Annexure B

Software pricing ERP Software document Annexure C

Solution / System Implementation document Annexure D

Pirbright Terms and Conditions