

**Invitation to tender for provision of an online platform to deliver HR Metrics surveys and data benchmarking for local authorities across the country**

**Summary**

1. London Councils’ HR Metrics Service provides a benchmarking and analysis service to participating local authorities to enable them to:
* compare and assess their performance across a range of HR measures;
* work collaboratively to develop and progress best practice; and
* tackle new challenges that require data insights.
1. London Councils is seeking to procure a user-friendly online tool that allows sub-scribing boroughs to enter their own survey data and access a range of outputs. The application will be used by the following organisations to help them conduct HR Metrics surveys and provide results/benchmarking charts, pdf reports, scorecards, dashboards and, in some cases, Excel spreadsheet outputs that users can generate online:
* London Regional Employers’ Organisation providing HR related support to 33 London boroughs including the City of London.
* West Midlands Employers’ providing HR related support services to 33 local authorities in the region.
* South East Employers organisation providing HR related support services to potentially 32 local authorities.
* There is the potential for other local authority regional employers to join the HR benchmarking club.
1. The online application is required to be operational for use from 1 April 2021 with a contract period of three years. There will be an option to extend this end date by 1 year plus 1 further year.

**Background**

1. The HR Metrics Service has been providing benchmarking surveys to the 33 London boroughs for over 15 years. The surveys were expanded in number and type several years ago when the service procured a sub-contractor to provide an online application to help conduct the surveys and produce a wider, more comprehensive, set of results outputs.
2. In the last year the approval was granted by Leaders Committee to expand the service and offer it to other UK regional employers. Since the beginning of this year 33 local authorities from the West Midlands regional employer and 10 local authorities from the South East regional employer have joined the London benchmarking club and use the online data platform.
3. The HR Metrics Service conducts a range of surveys with the subscribing councils to deliver workforce related benchmarking and analysis, through which boroughs can consider relative data against other London local authorities.
4. The service is overseen by a Governance Board that includes at least two Heads of HR, the Head of the London Regional Employers Organisation and an external adviser from the Institute of Employment Studies. The governance board meets at least twice a year and the performance of the successful provider will be reported to this forum.
5. The service currently delivers 12 core surveys, each of which has a high response rate, highlighting the value given to the work by the participating authorities.
6. The Service continues to adapt to the changing needs of its subscribing users, therefore, new surveys or changes to existing surveys may be required.
7. In addition to enabling benchmarking and analysis across its local government users, the surveys promote the local collection and use of best practice HR metrics. The benchmarking of HR data enables evidence-based decision making on key issues. It empowers councils to assess performance and drive improvement. Councils can compare their performance on HR indicators ranging from the reasons why staff leave to diversity in the workforce, HR casework and sickness absence. Each council can see where its performance sits in relation to others and can share policies/procedures and innovations that work.

**Objectives**

1. The overall objective is to deliver and online platform/website that allows users to upload data directly and download summary outputs. It is important that there is seamless transition from the current provision arrangements so that users can continue to access an application for their ongoing needs of data entry and output generation from 1 April 2021.

1. We are looking for a service provider that has the ethos of working with us as a partner, rather merely a provider of a fixed service/ product. We want a provider that has a disposition toward enhancement and development of the service and current list of survey products as part of the awarded contract price, and not seek formal variations to the contract and price. Whilst significant development costs will be reimbursed there will be an expectation that the service provider will be prepared to absorb the time, effort and cost of product development where suggested and agreed enhancements/ developments are merely responding to the current local government and operating environment, as well as emerging technical and information technology trends.
2. The list of surveys required for 2021/22 and each subsequent year is anticipated to include:
* Chief Officers' Pay
* Pay & Benefits (excluding Social Care)
* Pay & Benefits (Social Care)
* Human Capital Metrics
* HR Outputs
* HR Resources
* Terms & Conditions
* Trade Union Membership & Facility Time
* Agency CSW pay & numbers data
* Analysis of DfE CSW data
* Gender Pay Gap reporting
* Agency ASW pay & numbers data
* Bespoke individual user surveys allowing users to create smaller, one-off surveys to which other users can respond
* Pulse surveys created ‘on the fly’ through a web interface
1. The full list of surveys, and their output requirements, can be found at **Appendix A.** Data for the surveys is collected and published on a rolling timetable throughout the year, with roughly one per month. A full data collection and publication timetable for 2020/21 is available on request.

**Requirements**

1. London Councils’ detailed technical specification for the online application is **set out in Appendix B.** However, the key requirements for the online application are that it must:
* Be web/ cloud based
* enable simple and accurate data collection;
* enable quick and informative live analysis;
* enable users to generate their own bespoke results outputs including reports and scorecards and Excel outputs, which can be customised;
* use our own survey templates (questions and outputs) that we will provide;
* be able to migrate our historic survey data into outputs that are available going forward;
* be user-friendly, secure and accessible;
* offer backwards compatibility to IE8;
* be operated as hosted software as a service with no installation or set-up required by users;
* place no limits on the number of users or the number of actions users can perform on the application;
* place no limits on the number of organisations that can join the benchmarking club of organisations; and
* provide contact personnel who will work with our HR Metrics Service Team as required to ensure the surveys work effectively and meet future needs.
1. There may be ad hoc requests to provide updates and changes to functionality to ensure compliance with any future requirements, and the application will need to be able to accommodate changes from time to time in survey questions and in the make-up of responding councils (for example, for boroughs that move to sharing their workforces).
2. We are also interested in seeing your suggestions on measuring user satisfaction and measuring success of the service, as well as your suggestions and ideas on possible innovations and future developments for the platform.

**Project Costs**

1. The value of the contract with the current supplier equates to approx. £810 per local authority per annum, with a total of 74 local authorities currently subscribing from the three employer regions. The potential estimated value of the current contract if all 98 authorities in the three employer regions joined would be approx. £80,000 per annum.
2. It should be noted that the subscription cost per local authority differs according to local authority type with the cost for county and borough the most, unitary next and district lowest value.
3. In your costings, please provide costs broken down on a per local authority basis. Currently the list of subscribing local authorities breaks down by the following local authority type.

|  |  |
| --- | --- |
| Council type (from List) | Number of subscribers |
| **London boroughs including the City of London** | **33** |
| West Midlands Regional Employers |  |
| Counties  | 3 |
| Metropolitan boroughs (Cities) | 7 |
| Unitaries | 4 |
| Districts | 19 |
| **West Midlands Total** | **33** |
| South East Regional Employers |  |
| Counties | 1 |
| Unitaries | 5 |
| Districts | 4 |
| **South East Total** | **10** |

1. All current subscribing local authorities are expected to sign up to the service for a further 3 years from April 2021 to March 2024. However, the Service Level Agreement between London Councils and the subscribing local authorities provides for any local authority to unsubscribe, as long as 12 months’ notice is given.
2. In the event that the number of subscribing local authorities reduced during the period of the contract it is expected that the value of the contract would reduce by the relevant specified amount per borough. However, in order to provide certainty to the successful bidder, the overall annual cost of the contract would not fall below the price for 30 local authorities.
3. Costs should be clearly presented and be inclusive of all fees, direct and indirect costs, expenses but exclusive of VAT. An overall cost and a cost per subscribing local authority type should be provided. An example of a clear cost structure is provided in **Appendix C**.
4. It is anticipated that a degree of ongoing innovation and development work would be undertaken to consolidate and improve the survey inputs and outputs as part of the standard contract. Major changes - including adding new surveys to be subject to agreement between the contract parties without extra charge up to a total of 30 days' work per annum. Additional changes over the 30 days to be subject to discussion and agreement these may be chargeable.
5. Additional surveys, as required from time to time at the request of the regional employers for their authorities, will be subject of a change request process via the HR Metrics Governance Board (see below).

**Change request process**

1. Please include a price option for additional surveys, subject to the expected additional work without extra charge up to a total of 30 days' work per annum . It is expected that there may be one additional survey a year, based on past experience, and a schedule of rates is required for future surveys if more are required.
2. Due to the length and potential value of this contract the project with be included on the  Official Journal of the European Union (OJEU). In addition this project is being included in the Government’s Contracts Finder database.

**Tender Requirements**

1. Bidders should provide the following information in their tender:
* Proposed methodology and approach to the set up and ongoing delivery of the online platform
* An outline of all outputs from the project
* An outline of your approach to ongoing development and enhancement of the product in line with a partnership approach as identified in paragraph 12.
* Timetable for development of platform to be implemented by 1 April 2021, including key milestones, any risks that may affect the timing or delivery of outputs and contingencies
* Arrangements for project management, reporting and quality control
* Your approach to information security and associated contingency plans
* Clear structure of charges including day/hour rates, time spent on tasks, expenses. VAT will be paid at the applicable rate (an example of a clear cost structure is given in annex 2)
* Confirmation of acceptance of London Councils’ Terms and Conditions
* Your approach to Equality/Equal Opportunities
* Your approach to compliance with the Freedom of Information Act and General Data Protection Requirement.

**Evaluation Criteria**

1. We will evaluate your response based on a quality to cost ratio of 70:30 (where 70% is based on quality; and 30% on cost).
2. The quality element will be evaluated against the criteria given in the table below:

| **Evaluation criteria – Quality [70% of the total]** | **Weighting** |
| --- | --- |
| 1. Understanding of the objectives and requirements as evidenced by your proposal.
 | 20% |
| 1. Your experience of undertaking similar projects in local authority environments and/or working successfully with similar complex stakeholder groups.
 | 25% |
| 1. A clear methodology and approach to the work described above which is realistic and deliverable. Including an outline of any risks that may affect the timing or delivery of outputs**.**
 | 40% |
| 1. Innovation - suggested ideas for future innovations/development of the service and methods for measuring user satisfaction and the success of the service
 | 15% |

1. In addition, as the outputs are largely visual, bidders may be required to present a demonstration of their platform/application exemplifying its functionality and how it fulfils the brief to the London Councils Evaluation Team. This would take place virtually during w/c 18 January 2021.

**Procurement Timetable**

1. An indication of the timetable for the procurement process is set out in the table below:

|  |  |
| --- | --- |
| **Activity** | **Date** |
| ITT issue date | 9 December 2020 |
| Deadline for receiving tenders | Monday 11 January 2021 – 12.00 midday  |
| London Councils’ evaluation of proposals | By Tuesday 26 January 2021  |
| Contractors informed of outcome | By 29 January 2021 |
| Standstill period (10 days) | 30 January to 9 February 2021 |
| Contract awarded | w/c 8 February 2021 after Standstill period |

**Format of Tender Responses**

1. If you wish to apply, an electronic copy of your tender response with completed FOI and Equal Opportunities documents (available on the website) should be sent by email to, tenders@londoncouncils.gov.uk, quoting HRMetrics 12/20 to arrive by **12.00pm (midday) on Monday 11 January 2021.**
2. All submission documents should be provided in Microsoft Word format.
3. If necessary, you may seek clarification on the procurement process or the specification by contacting Steve Davies via: Steve.davies@londoncouncils.gov.uk
4. Enquiries will not be answered if received within **2** days of the date for submissions of tenders. Bidders should note that responses to each enquiry will be copied to all organisations bidding (though will not identify the originator of the enquiry) through the London Councils website.
5. If you are aware that the submission of your tender may give rise to a potential conflict of interest, please inform the officer to whom you are making the application.
6. Bidders are advised to **read all instructions before submitting their tender**. London Councils full instructions to bidders are at **Appendix D**.

**Freedom of Information Act**

1. You should be aware that the information you submit may be subject to a request for information. The provision of any information to external parties by London Councils is determined by statutory conditions provided for in the Freedom of Information Act 2000.

**Equality Opportunities**

1. The successful contractor will be required to comply with London Councils’ Equal Opportunity Policy and bidders should complete the Equal Opportunities Questionnaire with their tender submission.

**Conflicts of interest**

1. London Councils may exclude a bidder if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.
2. Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the Supplier to inform London Councils, detailing the conflict in a separate Appendix.

**Terms and Conditions**

1. Please see accompanying terms and conditions and confirm acceptance in your submission. Note that special conditions apply as outlined in Appendix 1 to the Terms and Conditions. These relate to:
* Intellectual Property rights; and
* Data sharing and Data Processing.

**Appendix A – Surveys likely to be required from April 2021 onwards**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Survey | Bulk upload by Councils | Upload by online form | Online charts | Bespoke pdf report per council (and overarching version for London Councils and Regional Heads) | Bespoke Scorecard per council (and overarching version for London Councils) | Customised Excel outputs | Raw data download |
| Chief Officers' Pay | Yes (except for London boroughs where a single bulk upload option is also required for London Councils) | Yes | Yes | No | No | No | Yes |
| Pay & Benefits (excluding Social Care) | Yes | Yes | Yes | No | No | No | Yes |
| Pay & Benefits (Social Care) | Yes | Yes | Yes | No | No | No | Yes |
| Agency CSW pay & numbers data | Yes | Yes | Yes | Yes | Yes | Yes | Yes |
| Permanent CSW pay packages | Yes | Yes | Yes | Yes | Yes | Possibly | Yes |
| DfE CSW data | No. The contractor will obtain the data from Gov.uk and upload it for all participating councils | Yes | Yes | Yes | Yes | No | Yes |
| Human Capital Metrics | No. Online form only | Yes | Yes | Yes | Yes | Yes - including charts | Yes |
| HR Outputs | No. Online form only | Yes | Yes | Yes | Yes | No | Yes |
| Terms & Conditions | Yes | Yes | No | No | No | Yes | n/a |
| Trade Union membership & Facility Time | No. Online form only | Yes | Yes | Yes | Yes | Yes | Yes |
| HR Resources | Yes | Yes | No | No | No | Yes | No. Except on request by HR Metrics Service which requires raw data for checks. |
| Gender Pay Gap reporting | No. The contractor will obtain the data from Gov.uk and upload it for all participating councils | Yes | Yes | Yes | Yes | No | Yes |
| Pulse Surveys (ad hoc surveys created on-the-fly through a web interface by Regional Heads) | No | Yes | Yes | No | No | No | No |
| User surveys\* see footnote | No | Yes | Yes | No | No | No | No |
|  \*User Surveys allowing users to create smaller, one-off surveys to which other users can respond. Live results are displayed to respondents, and a comments area is available for users to discuss the survey and results in greater detail. All users receive an email each time a new User Survey is released (or a daily or weekly digest email according to preference). Three types of user survey are required (1.) Numeric answer (results include a bar chart). (2.) text answer (results shown in a table). (3.) drop-down options for answers (results shown as a pie chart). Access to user surveys to be as follows: Super users and users with read/write access (granted by their super user) can conduct user surveys, see all the surveys, see the results of surveys to which they have responded, and see/take part in the comments section. Read only users can read the results to all surveys to which their council has responded and see/make comments. Email notifications for new user surveys, customisable by each user for instant notifications, or daily or weekly digest emails of new surveys. |

**Appendix B – Detailed technical specification**

|  |  |
| --- | --- |
| **Row No. For Ref Only** | **Item** |
| 1 | **General**  |
| 2 | Hosted software as a service, no installation or setup required.  |
| 3 | Accessible via secure login from commonly used web browsers. |
| 4 | Accessible on commonly used devices eg: PCs, iPads, phones etc |
| 5 | Full access-control |
| 6 | Two-factor authentication by TOTP/HOTP protocols |
| 7 | No user limit for each organization |
| 8 | No limit on the number of times users can generate reports, scorecards and other outputs. |
| 9 | User friendly - requiring no training prior to use (based on a good general understanding of applications in common use eg: MS Office, Google etc) |
| 10 | Provides documentation (knowledge base) on the application, including main features/tools and how to use the application. |
| 11 | Conducts a range of HR Metrics surveys, mostly annual but some may be twice yearly, quarterly or ad hoc. |
| 12 | Sets up and supports customized metrics questions and surveys as provided by London Councils and changed from time-to-time. ie: London Councils has its own surveys made up of its own questions that it will specify to the provider. Also enables multi-question Pulse Surveys to be created on the fly by London Councils and by other Regional Heads through a web interface, with their own questions and conducted of other users. And one-off User Surveys (User-created mini surveys, that can be conducted by any user with write access to User Surveys) with a searchable library of previous User Survey subjects by key words. (See List of Surveys for more details.) |
| 13 | Accepts data as required in response to survey questions, these inputs can be text, whole numbers, non-whole numbers, true/false, dates, multiple-choice/dropdown selection, and in some cases numeric data that requires calculations to enable the generation of results - eg: percentages calculated from a set of numeric data (eg: staff numbers by gender, ethnicity, length of service) - calculation methodology to be customised to meet London Councils' requirements. Some calculated metrics in survey results will require data from other surveys/periods. As far as practicably possible the application will make calculations from the raw data submitted (rather than councils submitting calculated figures eg: percentages) - but some data is submitted as a % value - where it is a set value calculated by the councils locally - eg: % of women in top 5% of earners. |
| 14 | Sub categories to be available within surveys - for example grouped questions/outputs eg: sickness metrics, HR casework metrics. |
| 15 | Provides named benchmarking reports of each council’s data against that of the other councils (details as per the items listed later in this specification). |
| 16 | Notifies, by email, all users with read/write and read only access rights to a survey when the survey results are ready/finalised. In addition for Pulse Surveys notifies by email, all users in the relevant region(s) about new surveys. |
| 17 | Surveys can be enabled and disabled (made invisible) for each council, depending on participation |
| 18 | Supports two-dimensional surveys (one question one answer) and three-dimensional ie: multiple answers possible per question – eg: CO Pay survey where users can drill down and apply several different filters to the charts they generate. |
| 19 | Survey definitions and other supporting information (including Excel templates for data entry) to be available for users to download from the website. |
| 20 | Data migration of all data will be required, including all survey data, user data, User Survey data and permissions etc from the current system. |
| 21 | User acceptance testing client to be provided to London Councils and user testing by London Councils supported to enable acceptance standard to be met before implementation. |
| 22 | Backwards compatibility - Some councils use older versions of IE - the application needs to be accessible/usable for users of older versions of IE (currently version IE9).  |
| 23 | ILB/OLB codes - each London borough has a code (ILBXX or OLBXX - where XX is a number). On occasion some surveys might require the results to appear with councils' codes instead of their names throughout online display and all reports. |
| 24 | Back-ups - regular off-site backups of all data |
| 25 | Full data ownership and data mobility- a full and current copy of all survey response data can be exported at any time in Excel or CSV format, to work with in a spreadsheet or import to another application. |
| 26 | Restoring data - in the event of any loss of data the data must be restored within 72 hours. |
| 27 | Data Protection Act (including GDPR elements) or successor Acts - Complies with legislation on the collection, storage and processing of data and any specific requirements set out by London Councils. |
| 28 | Technical support - London Councils and other Regional Heads will endeavour to cover day to day queries on the administrative aspects of the surveys - but the provider will need to offer a point of contact for more technical issues which it should aim to resolve within 72 hours. |
| 29 | Other support - provision of a point of contact who will work with London Councils HR Metrics Service Team as required to ensure the surveys work effectively and meet future needs. This point of contact also to work with other Regional Heads as required to ensure the surveys work effectively. |
| 30 | Review meetings - up to twice a year to be available in person or by remote contact (eg: Skype or telephone) to discuss/review with London Councils the operation of the services provided.  |
| 31 | **Granular permission control and System Admin** |
| 32 | London Councils HR Metrics Service has a "Super Super" user for the system who requires access to all areas accessible to any other user and permissions to read/write all data and perform all actions across the system. |
| 33 | London Councils HR Metrics Service "Super Super" User to have an Admin Control Panel that gives them all of the features of the Region-level admin control panel (given below), covering all users, surveys and regions. |
| 34 | Regional Heads' Admin Control Panel where Regional Heads/ regional level admins can: |
| 35 |  - See overview of the councils, superusers and users in their region |
| 36 |  - Set up new users for their region's councils and assign superusers (superusers are first nominated to the Regional Head by the Head of HR at the relevant council) |
| 37 |  - See overview of surveys being conducted in their region with summaries of responding councils |
| 38 |  - Open and close surveys for the current survey period |
| 39 |  - Add report appendices and scorecard summary texts including text formatting/tables |
| 40 |  - View and export usage data for users and councils within their region (including number of logins and recent activity). |
| 41 |  - Read/Write access to data for any council in their region in any survey, covering open and closed surveys. |
| 42 | Each Council has one or more superusers who see an overview of the users in their council and can set up and manage/delete other users for their own council and assign/remove appropriate access permissions (none, read-only or read/write) on per user, per survey basis by accessing/using their superuser Admin Control Panel. |
| 43 | Some councils require special arrangements to accommodate sharing arrangements they have in place for some services with other councils. These can include facilitating a choice of "organisation" to log into eg: Richmond, Wandsworth, Richmond & Wandsworth (this is required as these councils share some but not all services). Outputs also need to reflect this giving the appropriate "organisation" name for the data shown. Users can be assigned access to more than one council (with granular permissions per survey for each linked council), as well as shared-entities representing multiple councils sharing services - eg: Richmond and Wandsworth. |
| 44 | All data is transmitted over a secure connection |
| 45 | Provider to provide a password reset mechanism |
| 46 | **Data inputting** |
| 47 | Enable data entry by users with appropriate access permissions. |
| 48 | Survey respondents at the councils using the surveys can input/edit data directly into a secure web form or by end-user upload of customized Excel forms (in a specific, pre-determined format specified by London Councils) on the providers’ website. End-user bulk uploads as described in the sentence above are required for pay surveys and other surveys with a large volume of data to submit. (See List of Surveys for more detail.) |
| 49 | Part responses can be entered by users and saved (so they can come back later to complete their response.) |
| 50 | Simultaneous data edits by multiple users must be prevented/handled |
| 51 | The HR Metrics Service at London Councils to have read/write access to all councils’ data and all surveys. |
| 52 | Apply data validation as required to ensure that data being inputted/uploaded falls within the expected range (usually based on a specified range or a significant variation from that council's data for the previous period). If it fails validation the inputter is notified and given the opportunity to confirm or change the data. Data validation to include applying to uploads, and loose/fuzzy string-matching for multiple choice metrics. |
| 53 | Browser side aggregation of "raw" data (within each user's browser so that the original raw data is not uploaded onto the system) to provide aggregate data for reports.  |
| 54 | Provider required to obtain data annually direct from Gov.uk and upload it for subscribing councils for Gender Pay Gap Data (https://gender-pay-gap.service.gov.uk/) and DfE CSW Workforce Data Collection (https://www.gov.uk/government/collections/statistics-childrens-social-care-workforce) |
| 55 | Provider required to update pay survey data by the amount of annual pay award in years when the pay award is announced after the data has been partly or completely collected. Pay surveys to ascertain whether data councils upload includes that year's pay award and where it does not, the provider is to uprate the pay data given by the % amount of the pay award. This applies only to councils that apply the national pay awards and those with local conditions that mean that the same % award is made. |
| 56 | **Outputs required - the outputs currently required to be available for generation by users are:** |
| 57 | **General Requirements** |
| 58 | Ensure only those with appropriate access permissions can generate/view survey results |
| 59 | PDF outputs and, where relevant, custom outputs such as Excel outputs can be customised, at time of export, to include selected councils, regions and metrics |
| 60 | Cross region compatibility - Comparators can be selected for charts and reports by region, council type (inner/outer London, district, unitary, county) or by individual council |
| 61 | When selecting comparators for reports and other exports, all councils in the user's region with responses for that survey are selected by default, and the selection saved for future use. The comparators are grouped by council type and region, with buttons to quickly select/deselect all councils from each type or region. |
| 62 | **Charts (including for pay surveys)** |
| 63 | Users can generate a range of graphs and charts on demand from the most up-to-date data. These graphs and charts can be viewed online and exported to MS Office Applications formats for further analysis or inclusion in presentations and/or local reports. Charts are accompanied by a data table showing the council names and figures used in the chart. The table is also downloadable to MS Office Applications formats. |
| 64 | Users have a choice of trend chart or current period chart to generate, and the option to generate the relevant table of data with the chart. |
| 65 | Where there are multiple data points from a single council (for example in pay surveys) the bar for that council on the chart should show the median value for those data points for that council. |
| 66 | Charts are colour-coded by region |
| 67 | **Reports and Scorecards (eg: Human Capital Metrics, HR Outputs, GPG DfE CSW workforce data surveys)** |
| 68 | Generate tailored reports and scorecards. Each council, London Councils and each Regional Head can generate its own unique report/scorecard with its own logo and colours – in which the charts and text are bespoke to that council’s data (or in the case of London Councils and each Regional Head the overview of all councils in their region) for immediate download in PDF format. Council branding in PDF reports must accommodate branding guidelines from each council regarding logo positioning, use of colours and spacing, and fonts. Branding across web and reports also to reflect regional organisation of logged in user. Reports to include: |
| 69 |  front cover with name of survey and period, also the name of the council generating the report and their logo |
| 70 | ·contents page with page numbers for each metric (metrics to be grouped into theme areas - eg: staff numbers, sickness etc.) |
| 71 | ·bar charts for each metric showing the values and identities of each council and including a median line |
| 72 |  trend charts showing the recent trend data for the users’ council and the median value for inner or outer London; and different council types in other regions as appropriate. |
| 73 | ·tables of key data |
| 74 |  pie charts for grouped values eg: sets of age bands (one for the relevant council and one of the median values for the other councils) |
| 75 | ·descriptive/explanatory notes as required about each metric (to be provided by London Councils) |
| 76 | ·descriptive text stating the council's quartile position in London and in inner/outer London, or for different council types in regions as appropriate, change from previous period, and comparing the relevant council’s data with the mean average change for London and for inner/outer London (as appropriate). |
| 77 | ·a free-text appendix of notes (that will be provided by London Councils and other Regional Heads) |
| 78 | Each council's bar charts to show their data differentiated from the other councils'. |
| 79 | Reports to be branded with each council’s logo and colours (eg: charts etc are in the council’s own colours) and include an automatic textual summary of the data including trend analysis by inner/outer/all London, or different council types in regions as appropriate. |
| 80 | Users can select which metrics they want to include in the reports and scorecards they generate (select by question-groups and/or by individual metrics) and set these as a default or choose different indicators for subsequent reports and scorecards.  |
| 81 | Reports run by users will exclude any metrics for which they did not provide data.  |
| 82 | Only those councils that have taken part in a survey can generate reports and scorecards for that survey. |
| 83 | Reports can be customised to include additional appendices. |
| 84 | Users can preview reports online and add their own free text to any page of each report for each survey/period, so that the text they have added will appear in the final pdf report that is generated. |
| 85 | Users can generate scorecards showing a free-text summary of the London-wide results (to be provided by London Councils) and their own council’s values in this and the previous period, the averages (mean and median) of other councils in the region, the previous year's mean for the region, the range of responses and the number of councils that provided a response for that metrics, for any of the metrics they select, or all metrics. Scorecards also council-branded and can contain survey-specific footnotes. Also to provide same but with each regions' values, for each other region. |
| 86 | **Custom-designed Excel outputs to match client's design (for example for Trade Union, Terms and Conditions and HR Resources surveys).**  |
| 87 | Data to be uploaded by councils using custom-designed Excel input forms the content design and layout of which to be as specified by London Councils to exactly match those in current use. These to be downloadable by users from the provider’s website. |
| 88 | These outputs are as specified by London Councils in the form of custom-designed Excel spreadsheets to match those in current use. The outputs to be available for users to download as compiled sets of data with calculated fields, numeric and text values including free text and drop-down selections. All including the presentation layout and appearance are to be as specified by London Councils. Exports must reflect latest version of data. |
| 89 | For example, the HR Resources survey outputs comprise an Excel workbook of 7 custom-designed spreadsheets including a table showing a compilation of free text entries per council; tables showing top-line summaries of average FTE employee numbers by 5 different categories, headcount and average of HR FTE ratios to workforce headcount and number of the survey responses by "as at" date; table of average FTE of HR by work type and grade band for all councils in the region; table of average FTE of HR by work type and grade band for Inner London; same for Outer London (in the case of London but by other council categories for other regions - ie: County/ Metropolitan Borough/Unitary council and District Councils) all values to be calculated from the data provided by each council in its custom-designed Excel upload form); table of outsourced HR work by council by work type with name of provider; table of shared HR work by work type with name of partner/partners. As this survey does not have a raw data export option. the provider will need to give the relevant Regional Head their councils' raw data on request to enable them to conduct data checks. |
| 90 | Custom Excel scorecard of London boroughs' Human Capital Metrics survey data for London Councils comprising median and mean values and overarching totals to include charts to be available to be generated by London Councils (required for CELC).  |
| 91 | **Pulse Survey outputs** |
| 92 | Results to be available to view online (to superuser, or to all users according to settings) |
| 93 | Results to be available to export as csv and Excel formats |
| 94 | **Dashboard style outputs** - designs to be specified by London Councils and may include colour-coded maps, graphs/charts of various types, automated textual analysis of data/trends, user-inputted annotations, other infographic elements and per-council branding. |
| 95 | **User Survey Outputs** - as set out in footnote to List of Surveys table (attached) |
| 96 | **Raw data export -** Users can export survey data in raw form into Excel or CSV format. |
| 97 | **Customer satisfaction** |
| 98 | **Provision of user data** - To enable London Councils to assess the numbers of actions and their type and which survey they relate to, which user/council etc. - provide annual usage data for the application to London Councils HR Metrics Service to cover all user actions by: |
| 99 | type (eg: login, create new user, generate chart, generate report, generate scorecard etc.) |
| 100 | user |
| 101 | council |
| 102 | council type |
| 103 | region |
| 104 | survey |
| 105 | date |
| 106 | **Changes** |
| 107 | Minor changes: Branding changes (eg: where a council changes its logo/corporate colours), adding to dropdown options in surveys, changing validation rules, and the annual updating of custom Excel surveys to reflect increases in nationally agreed rates (eg: redundancy statutory minimum amount, sleeping-in duty allowance). These changes should be made free of additional charge. |
| 108 | Major changes - including adding new surveys to be subject to agreement between the contract parties without extra charge up to a total of 30 days' work per annum. Administered by a change request process. Additional changes over the 30 days to be subject to discussion and agreement these may be chargeable (subject to a change process, provision of specification, quotation etc). |
| 109 | In addition, and at no extra charge changes to accommodate changes to sharing arrangements between councils as required - examples below: |
| 110 | Accommodation of the fact that from time to time councils enter into or leave sharing arrangements with each other. There may be sharing of all data between two or more councils, sharing of data for some surveys by a number of councils (which share data for other surveys with different councils), sharing between councils that are a mix of Inner and Outer London, changes in sharing arrangements. The system needs to be able to adjust to accept/output data to reflect existing and future sharing arrangements among the boroughs. This includes the need to reprocess back data for previous periods to reflect new sharing arrangements (eg: so that trend reporting can work for previous periods etc.) |
| 111 | Adjustments due to councils sharing or ending sharing arrangements with other councils - eg: changes to user/councils combinations - for example when councils are sharing, a single user may need to access the application in respect of more than one council using her/his single work email address. Several councils may share a super user, and in some cases a single super user will cover several councils. |

**Annex C - Example of cost table**

Below is an example of a clear cost structure. Other cost breakdowns will be accepted; however a clear structure that will allow London Councils to easily assess value for money – including cost per stage and/or days/hours per person - should be used.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **All text is given as an example only please provide detail** | **Project Director** | **Project Manager** | **Researches** | **Overall days/ hours** | **Overall cost** |
| **£ day / hours rate** | **£x** | **£x** | **£x** |
| **A** |
|   | days/hrs | days/hrs | days/hrs | days/hrs |   |   |
|   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |
| **B** |
|   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |
| **C** |
|   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |
| Travel |   |   |   |   |   |   |
| **Total Cost** | **£**  |
| **Cost per Local Authority type** **(assuming current subscribers remain)**  |  |
| **London borough** | **£** |
| **County/ Metropolitan borough** | **£** |
| **Unitary** | **£** |
| **District** | **£** |
| **Estimated cost per additional survey** |
|   |   |   |   |   |   |   |
|   |   |   |   |   |   |   |
| **Total additional cost per survey** | **£** |
| **Cost per local authority (single rate same)** | **£** |

**Appendix D - Instructions to bidders**

1. **Tender Submissions**
	1. All pages of the bidder’s tender should be sequentially numbered (including any annexes and supporting documents).
	2. Bidders are advised to submit tenders by email to tenders@londoncouncils.gov.uk.
	3. The tender must not arrive later than the date and time stipulated. Tenders received after that time may not be considered unless the bidder can prove that the tender was dispatched in sufficient time to meet the deadline.
	4. By submitting a tender, the bidder agrees to keep that tender open for acceptance by London Councils for 90 days following the closing date.
	5. London Councils does not accept suppliers’ Terms and Conditions.
2. **Amendments to Tender Documents**
	1. Prior to the deadline, London Councils may modify the tender documents by amendments in writing. London Councils may extend the deadline for tenders to allow for significant amendments to be fully assessed and taken into account.
	2. The bidder may modify the tender prior to the deadline for receipt by giving notice in writing or by email.
	3. No tender may be modified after the deadline for receipt.
	4. The contractor may not transfer, assign or sublet the contract, or any part thereof, without the prior written consent of London Councils. If such consent is given the contractor will remain liable for the performance of the contract in its entirely as if such assignment or sublet had not taken place.
3. **Tender Charges**
	1. Charges must be in pounds sterling and be inclusive of all costs but can be exclusive of VAT.
	2. Charges shall be fixed for the duration of the Contract and will not be subject to any variation unless detailed in the Contract document.
	3. London Councils shall not be liable for any costs incurred in the production of the tender submission.
4. **Tender Evaluations**
	1. London Councils intends to commission the most economically advantageous tender and reserves the right to accept or reject all or any part of any quote.
	2. London Councils does not bind itself to accept the lowest charged tender.
	3. London Councils reserves the right to change the timing or any other aspect of the procurement process or to cancel the procurement process at any stage without prior notice.
5. **Intellectual property rights**
	1. All information provided by London Councils shall be treated by the Contractor as confidential except where prior written consent has been given by London Councils that such information may be disclosed. The dissemination of information within your organisation should be on a need-to-know basis.
	2. All intellectual property rights arising from the work will reside with London Councils.