



Valuation Office
Agency

INVITATION TO TENDER

SPECIFICATION

Programme Assurance Review in support of
Business Transformation

VOA/2020/037

1. INTRODUCTION

- 1.1. The Valuation Office Agency (VOA) is an executive agency of Her Majesty's Revenue and Customs (HMRC). As the public sector's property valuation experts, we provide valuations and property advice to the government and local authorities in England, Scotland and Wales to support taxation and targeted financial support for families and individuals. The VOA also provides property valuation and surveying services to public sector bodies. Its work includes:
- 1.1.1. compiling and maintaining lists of council tax bands for approximately 26 million domestic properties;
 - 1.1.2. compiling and maintaining lists detailing the rateable value of over 2 million commercial properties for business rates;
 - 1.1.3. determining Local Housing Allowance rates across England;
 - 1.1.4. advising local authorities of the maximum subsidy level payable for Housing Benefit claims under the local reference rent system;
 - 1.1.5. maintaining a register of fair rents for regulated tenancies in England;
 - 1.1.6. providing statutory valuations to support taxes administered by HMRC and the administration of benefits by the Department for Work and Pensions; and
 - 1.1.7. providing a range of independent property advice and valuations across the public sector.
- 1.2. Please see www.voa.gov.uk for further details.

2. BACKGROUND – The Business Systems Transformation (BST) Programme

- 2.1. At the VOA we are re-designing and simplifying our core business processes, while also implementing new, more flexible data structures and technology systems to support those processes.
- 2.2. This work is necessary to meeting our commitment to delivering more regular business rates revaluations. This will increase the volume of work

we face and our corresponding cost base, requiring significant changes to the way we operate to increase our productivity and continue to meet our customers' quality and timeliness expectations.

- 2.3. We currently face constraints in our ability to drive operational efficiencies in our existing processes; while our legacy technology is useful in its core functions, it does not give us the flexibility needed to make significant changes to the way we work.
- 2.4. In order to cut costs and deliver on public commitments, we need to modernise our business by driving key operational efficiencies, simplifying our core processes, and fundamentally transforming the way we operate at the organisational level.
- 2.5. This programme of work is focusing on a top-down re-design of our business systems without initial reference to existing process, responding to our current strategic and legal context.
- 2.6. Such a transformation will enable us to better utilise our experienced resource, by removing a reliance on administrative processing and information-entry and will allow staff to focus their time and skills on key valuation activities.
- 2.7. The Business Systems Transformation Programme ("the Programme") began in 2019 and is about to enter the Pre-Delivery phase. A high-level overview of the Programme and phases is provided in the form of a roadmap in Annex A.
- 2.8. VOA's digital delivery is managed by HMRC's CDIO. CDIO will be approaching the market to select a delivery partner, or partners, to support the build, configuration and implementation of the technical products, platforms and services that will underpin the VOA's future business architecture and operating model.
- 2.9. In parallel to the Pre-Delivery phase, VOA requires a one-off, time-limited assurance review of the current status, set-up and progress of the Programme to ensure that it is fit for purpose and in the best possible position for successful delivery of Programme objectives. (The subject of this tender).

3. REQUIREMENT

3.1. Scope

3.1.1. The Supplier will undertake an independent assessment to provide the Senior Responsible Officer with assurance on the overall health and deliverability of the Programme, appropriate to its current (pre-delivery) stage. The assessment will review progress to date through attendance at key meetings, a desk-based review of artefacts and a series of meetings with stakeholders. The Supplier will outline the results of its assessment in a short report that provides an overall delivery confidence assessment, an assessment of readiness to move to delivery (with recommendations for priority activity to improve readiness), and a broader set of recommendations to ensure the programme moves to successful delivery.

3.1.2. The assessment will:

- Review the business design phase of the programme, to provide assurance that the design reflects the programme vision; provides a clear business architecture and operating model; is comprehensive and well-understood across the programme and by key stakeholders; and is documented – including through a detailed set of requirements - in a way that supports progress to delivery
- Assure the robustness of the programme plan and corresponding schedule to provide an assessment of the deliverability of the programme.
- Review the preparedness and capacity of the IT Delivery partners, to meet business requirements and programme timescales.
- Assess the extent to which the current set of supplier arrangements, and those proposed for the delivery phase, provide confidence of successful delivery.

3.2. Methodology and outputs

3.2.1. In conducting the review, the Supplier will be expected to collate relevant data and provide demonstrable evidence to be able to assure the SRO.

Records collected during any interviews with key stakeholders must be captured in line with GDPR and security guidelines.

3.2.2. A summary of the findings, including recommendations about where improvements can be made, must be in an Executive Summary. This should represent a balanced view of the Programme and is expected to be presented to the SRO.

3.2.3. In line with guidance from the Cabinet Office Government Digital Service (GDS), the Supplier will also produce an evidenced based assessment of the programme against the seven lenses maturity matrix.

3.2.4. As part of the findings the selected partner will be expected to present a proposed Plan of Action supporting the findings and recommendations.

3.3. Security

3.3.1. Supplier personnel will be required to have clearance to SC

3.4. Documentation for Review

The minimum existing documentation that must be reviewed and assured includes:

- BST Business Case
- Programme Definition Document
- Programme Governance Plan
- Stakeholder and Communications Strategies
- CRAAIDD
- MS Project Plan and associated roadmaps
- Benefits Realisation Plan
- Business Design Authority Terms of Reference
- Programme Board Terms of Reference

The minimum stakeholders whose input must be obtained are:

- Senior Responsible Officer
- Programme Director
- VOA Transformation Team Portfolio Leads

- Business Architecture Design Team for BST
- Business Change Lead
- VOA CG – BSM & BST Technology Director
- VOA CG - Head of Innovation and Architecture
- GDS representative
- HMRC Commercial
- VOA Commercial
- Chief Finance Officer

3.5. Timescales

Following appointment, from the agreed start date (Day 1), the Supplier will meet the Programme Director and SRO and will be provided with access to high-level programme documentation. This will enable a refined and detailed plan to be presented for agreement and approval (based on the outline plan in the tender/contract).

An emerging findings presentation may be appropriate during the core review period.

The final report is expected within 20 working days of the start date.

4. TIMETABLE

5. The estimated timetable for delivery is set out below

DATE	ACTIVITY
9th December 2020	Publication of ITT
9th December 2020	Clarification period starts
12.00 (noon) 21st December 2020	Clarification period closes ("Tender Clarifications Deadline")
22nd December 2020	Deadline for the publication of responses to Tender Clarification questions
3pm 7th January 2021	Deadline for submission of Tenders to the Agent ("Tender Submission Deadline")
8th January 2021	Bids Compliance Checks
w/c 11th January 2021	Bids Evaluation Process
w/c 18th January 2021	Proposed Award Date of Contract

w/c 25th January 2021

Expected commencement date for Contract

6. CONTRACT TERM

- 6.1. The contract term will be confirmed according to the proposal from the successful bidder. VOA anticipates that the assignment will take no longer than 3-4 weeks. If VOA require an extension then a decision will be taken via existing internal governance and the term extended with the Supplier.

7. VOA CONTRACT MANAGER DETAILS

- 7.1. The VOA contract manager will be responsible for the day to day management of the contract. Once the contract has been awarded, all contact with VOA concerning the project should be made through the Contract Manager.
- 7.2. The VOA reserves the right to appoint an alternative Contract Manager at any given point throughout the duration of the contract.
- 7.3. The Partner will be required to appoint a contract manager to serve as the VOA's point of contact within the organisation.

8. PAYMENT TERMS

- 8.1. Payment will be made on satisfactory conclusion of the contract. An invoice should be provided within one month of VOA approval of deliverables. Payments will be made via an electronic payments system following receipt of a valid invoice issued against a purchase order from the client through the SAP Ariba system.

9. TERMS AND CONDITIONS

- 9.1. This Tender is being run via Contracts Finder as an open competition.

10. EVALUATION

QUALITY CRITERIA (this will form 70% of the evaluation)

10.1. **Aims, Objectives, and Risks (20%)**

Tenderers should explain their understanding of the purpose of the review outlined in Section 3, and how their involvement will help VOA to meet overall BST Programme objectives.

Max word count 300

10.2. **Methodology and outline plan (30%)**

Tenderers should outline their approach to the task, explaining the benefits of the approach.

Any assumptions or requirements of the client should be made clear.

Tenderers should provide a timed outline plan for delivery of the assignment.

Max word count 1000

10.3. **Individual capability and suitability (20%)**

Tenderers should provide named resources who will deliver the assignment, clearly indicating the roles and responsibilities of each and the proposed time commitment.

Tenderers should provide a CV for the assignment lead and any other individuals who will be spending more than 0.4 FTE on delivery of the contract and outline their experience relevant to the role they will play in delivering this requirement.

Please also include a statement about the security clearance level of the individual.

Max word count 1000 (or equivalent 1 side of A4 CV per person)

10.4. **PRICING (This will form 30% of the evaluation)**

Please provide a **firm price offer** based on the above specification of the work, inclusive of expenses but exclusive of VAT. Any recommendations tenderers make in their proposal outside of this specification should be costed for separately.

Resource	Role	Rate (/day)	Typical effort (days)	Cost
<i>*to be confirmed</i>			TOTAL	

Tenders will be assessed against the TOTAL PRICE offer for delivering the full specification.

11. SCORING

- 11.1. Scores will be allocated for each quality question in line with the scoring scheme located in Appendix A. The maximum available score will be 100.
- 11.2. Price will be scored by allocating the full marks available (30%) to the lowest priced Tender (of those Tenders that have passed the quality threshold). Other Tenders will be scored by percentage variance from the lowest priced bid.
- 11.3. The contract will be awarded to the Tender with the highest combined cost and quality score.
- 11.4. Interviews are not expected. However, if they are used, they will be for clarification and confirmation only. Judgments will be against the quality criteria set against overall cost (excluding VAT) with relative weightings as detailed.

12. TENDER QUERIES

- 12.1. Tenderers with any queries about this specification should contact **tenders@voa.gov.uk** by email before **12.00 (noon) 21st December 2020** with the subject title “BST Programme Assurance Review”.

13. TENDER SUBMISSION

- 13.1. You should send a PDF or read-only electronic copy of your proposal by e-mail to tenders@voa.gov.uk, as an attachment to an e-mail message entitled “BST Programme Assurance Review”. Tender to arrive no later than **3pm on 7th of January 2021** (unless the date is subsequently amended in writing by the VOA).

- 13.2. Please note that email messages with this title will not be opened in advance of that deadline. No hard copies of the Tender are required.

Appendix A

Score	'Closed' Question Criteria	'Open' Question Criteria
100	Excellent answer which meets all of the requirements and provides all of the required detail.	An excellent response that: <ul style="list-style-type: none"> • is completely relevant, addressing all of the requirements; • demonstrates an excellent understanding of the requirements, is comprehensive, robust and unambiguous; • provides highly credible supporting evidence, benefits or innovation; and/or • meets the requirements in all aspects, with no ambiguity or weaknesses identified and no clarification required.
80	Good answer which meets all of the requirements but lacks some minor detail	A good response that: <ul style="list-style-type: none"> • is highly relevant, addressing all of the requirements; • demonstrates a good understanding of the requirements and is comprehensive; • provides supporting evidence of sufficient detail; and/or • meets the requirements in all aspects, but contains minor weaknesses or a small amount of ambiguity.
60	Satisfactory answer, which meets the requirements in many aspects, but fails to provide sufficient detail in some areas.	A satisfactory response that: <ul style="list-style-type: none"> • is relevant, addressing most or all of the requirements; • demonstrates a satisfactory understanding of the requirements; • provides supporting evidence but lacks detail in some areas; and/or • meets the requirements in most aspects, but contains manageable weaknesses or some ambiguity and may require some
40	Limited answer which satisfies some aspects of the requirements, but fails to meet the specification in the whole.	A limited response that: <ul style="list-style-type: none"> • is mostly relevant, addressing most of the requirements; • demonstrates a limited understanding of the requirements; • provides supporting evidence but lacks detail in some or most areas; and/or • contains weaknesses or ambiguity which suggest that the requirements would not be met unless clarified.
20	Poor answer which significantly fails to meet the requirements.	A poor response that: <ul style="list-style-type: none"> • is only partially relevant, addressing some of the requirements; • demonstrates a poor understanding of the requirements; • provides supporting evidence that is of limited/insufficient detail or explanation; and/or • contains multiple and/or significant weaknesses or ambiguity that suggest the requirements would not be met.

Score	'Closed' Question Criteria	'Open' Question Criteria
0	<p>The response is not considered relevant.</p> <p>The response is unconvincing, flawed or otherwise unacceptable.</p> <p>Response fails to demonstrate an understanding of the requirement.</p> <p>No evidence is provided to support the response.</p> <p>Or nil response.</p>	<p>An unacceptable response that:</p> <ul style="list-style-type: none"> • is not fully relevant, addressing some or none of the requirements; • demonstrates very limited or no understanding of the requirements; • provides little or no supporting evidence that is of insufficient detail or explanation; and/or • is unconvincing, flawed or otherwise inadequate, suggesting that the requirements will not be met. <p>Or nil response.</p>