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**Invitation to Tender**

For Customer Relationship Management System (CRM)

Tender Registration Number **664FALMOUTH**

RETURN DATE:

Friday 26th June 2015 at 12.00pm

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#### PART A.

#### Introduction

Dear Sir or Madam,

**Re. Invitation to Tender for Customer Relationship Management System**

You are invited on behalf of Falmouth Exeter Plus and Falmouth University to quote for the Services as set out within this document.

Falmouth Exeter Plus and Falmouth University are pioneering specialist multi-arts institutions that work alongside the creative industries to cultivate talented, highly employable graduates, original thinkers and forward thinking entrepreneurs who drive innovation and inspire new levels of professional and academic success.

Suppliers are required to submit a tender in accordance with these instructions. These instructions are intended to ensure that all Suppliers are treated fairly, equally and in a non-discriminatory manner. Failure to comply with these instructions may result in the rejection of the tender.

The completed tender documents should be uploaded in a common electric format (such as PDF, WORD, EXCEL OR POWERPOINT) including clearly referenced supporting information via and e-mailed to [Procurement@fxplus.ac.uk](mailto:Procurement@fxplus.ac.uk)

The deadline for the submission of Tenders is Friday 26th June 2015 at 12.00pm

Yours faithfully,

Chris Jones

Head Of Procurement

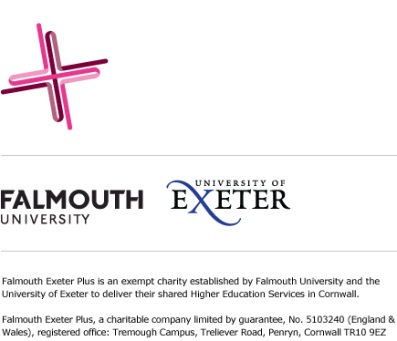
Falmouth Exeter Plus and Falmouth University,

**Falmouth Exeter Plus**

Penryn Campus, Penryn, Cornwall TR10 9EZ

Direct line: 01326 253504

Email: [Procurement@fxplus.ac.uk](file://tremictssan.fal.ac.uk/staffdocs/CJ159335/My%20Documents/CJ%20Stuff/Procurement@fxplus.ac.uk)



#### 

#### PART B

#### Description of Services to be supplied

The successful Tenderer shall enter into a contractual relationship with Falmouth Exeter Plus and Falmouth University for the provision, of the following:-

* *Please see Part F (PAGE 14)*

**Conditions for Tendering**

**Timetable**

The timetable set out below is indicative only and Falmouth Exeter Plus and Falmouth University reserves the right to make changes to the timetable.

|  |  |  |
| --- | --- | --- |
| Tender Process (Indicative) | Stage 1 | Date |
| Tender released | Monday 15th June 2015 |
| Deadline for Clarification Questions | Wednesday 24th June 2015 at 5.00pm |
| Deadline for Receipt of Tenders | Friday 26th June 2015 at 12.00pm |
|  | Stage 1 Shortlist Tenderers Announced | Wednesday 08th July 2015 |

|  |  |  |
| --- | --- | --- |
| Tender Process (Indicative) | Stage 2 | Date |
| Supplier Presentations | Monday 13th July or Friday 17th July 2015. (TBC) |
|  | Winning Tender announced (subject to contract) | Friday 24th July 2015 2015 |

Only Tenderers who respond in accordance with the submission requirements may be considered. During the tender period, Falmouth Exeter Plus and Falmouth University staff, its consultants and project team members should not be contacted as this may lead to disqualification from the Tender. All correspondence, clarification questions etc. (whether before or after the final submission of tender) are to be directed to procurement@fxplus.ac.uk

Falmouth Exeter Plus and Falmouth University reserves the right to amend or withdraw the ITT at any stage of the tendering process.

**Receipt of Tenders (STAGE 1)**

Tenders will be received up to mid-day on Friday 26th June 2015 Please ensure your Tender is delivered no later than the appointed time and give due consideration that documents can take time to send by e-mail.

Your Tender may not be considered if it is received after the deadline.

Tenderers may e-mail their completed Tender response and attachments at any time before the stated closing date and time for submission.

**Confidentiality**

Tenders must treat the ITT and all associated documentation supplied by Falmouth Exeter Plus and Falmouth University as confidential.

**Questions/Clarifications**

All requests for clarification or communications relating to the Tender must be submitted by the deadline to [Procurement@fxplus.ac.uk](mailto:Procurement@fxplus.ac.uk) **FAO Joe Grant** and with the procurement reference number clearly referenced.

No approach of any kind in connection with the ITT should be made in any other manner, or to any other person within, or associated with, FX Plus (including its representatives).

FX Plus intends to provide all information that is relevant to all Tenderers, even if this information is only requested by one Tenderer.

Please note that the deadline for receipt of clarifications is Wednesday 24th June 2015 at 5.00pm

**Amendments to Tenders**

Falmouth Exeter Plus and Falmouth University may at any time prior to the Tender return date, amend the ITT. Any such amendments shall be notified to Tenderers in writing.

If Falmouth Exeter Plus and Falmouth University issues any circular letter to Tenderers during the Tender period to clarify the interpretation, to be placed on part of the documents, or to make any changes to them, such circular letters will form part of the ITT. Accordingly all Tenderers will have been deemed to take account of these in preparing their submission.

**Language**

The official language of the Tenders is English. All Tenders must be submitted in English, including all additional information.

**Financial Data**

Any financial data provided must be submitted in, or converted into, pounds sterling. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided.

**Deviations**

Information or supplementary material, unless specifically called for in subsequent communication, will not be considered.

**Overseas Tenders**

Overseas Tenderers should note that, for Customs purposes, no commercial value should be assigned to any postal or courier documentation for the Tender. Assignment of commercial value may cause your submissions to be delayed and returned to you unopened.

**Tender Materials**

All material which is submitted as part of your response to the Tenders will be retained by Falmouth Exeter Plus and Falmouth University and will not be returned to Tenderers.

**Tender Requirements**

Please answer all of the questions below. Failure to answer the questions may result in disqualification from the process. Please ensure that your submitted answers are in the order given below and where possible in the boxes as indicated alongside the questions. Please provide clear indications of any appendices/supplementary information and be succinct as possible.

**Right to Reject Tender**

Falmouth Exeter Plus and Falmouth University is under no obligation to accept any Tender and does not bind itself to accept the lowest or any Tender for all or any part of the requirement. Falmouth Exeter Plus and Falmouth University will not accept responsibility for any expense or loss which may be incurred by any Tenderer in relation to the tendering process, including in the preparation of the Tender, attendance at any presentations, site visits etc.

#### Preliminary Compliance Review

The information supplied in Tender responses will be checked for completeness and compliance with the requirements of the ITT before the wider Tender responses are evaluated. The preliminary compliance review will check that Tenderers have:

* answer all questions (or explain satisfactorily if considered not applicable);
* submitted a Tender in the format and medium required; and
* have signed the declaration.

Where in the opinion of Falmouth Exeter Plus and Falmouth University a response is non-compliant, the Tender may be excluded from further consideration. Failure to provide a satisfactory Tender response (or any Tender response) to any element of the ITT may result in Falmouth Exeter Plus and Falmouth University not proceeding further with that Tender.

**Evaluation & Award Criteria**

The evaluation will be assessed against the Tenderers’ ability to meet the requirements attached against the award criteria set out below

The Tender will be evaluated in two stages. A maximum of three of the top scoring suppliers will be shortlisted and requested to proceed to Stage 2 of the process.

Tenderers will be evaluated after Parts I, II III, have been scored. Scores from Stage 1 will not be carried into Stage 2.

Unless otherwise stated, the scoring mechanisms will be used to score the responses to the Tender deliverables, with the objective of helping to determine full compliance with Falmouth Exeter Plus and Falmouth University’ requirements, whether in whole or part; and the most economically advantageous tender.

STAGE 1:

The Award Criteria is as follows:

|  |  |
| --- | --- |
| **Award Criteria** | **Written Response**  **Weighting** |
| **Part I General Requirements** | **PASS/FAIL (and Information Only)** |
| **Part II Quality/ Expertise (breakdown below)** | **60%** |
| **Part III Price** | **40** |
| **Total** | **100%** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Part** | **Weighting** | **Criteria** | **Details** |
| **Part IIA** | **25%** | **Technical Merit /**  **Out the box functionality**  *Please complete Appendix G*  *\*Failing to meet essential non-functional requirements results in 0 score.* | Our requirement is for a CRM solution with features and an intuitive user interface (UI) that has already been tried and tested successfully with other HEI’s. We expect minimal custom development and customisation to meet our business outcomes. |
| **Part IIB** | **20%** | Relevant HE experience of successful CRM implementations in the last three years.  *Please complete Appendix J* | We will score against three successful reference sites being supplied. Any less than three, or non HE will be scored accordingly. |
| **Part IIC** | **15%** | Ability to execute *(refer to sections 4.1 and 4.2 of the high level requirements appendix)*  *Please complete Appendix J* | Equally scored between:   * Development approach. * Ability to mobilise immediately following contract award, and a solution fast, i.e. implementation timing estimate. * UK onsite implementation and training |
| **Part I** | **40%** | Implementation and Year 1 run cost.  Please complete pricing response sheet provided. | * Development for any of our functional requirements you marked as “custom development” should be included in your implementation cost. * If your solution requires 3rd party add on to meet our functional requirements please include those costs. |

**Pricing response:**

* Please provide a fixed price cost for implementation. (Suppliers who are shortlisted will be scored against transparency of work effort in further stages).
* Base licencing costs at 25 users. If licencing based on enrolled students please include costs for up to 5000 students, and for the next tier.
* Suppliers must provide a work breakdown structure (WBS) clearly articulating the breakdown off effort for the implementation, e.g. business analysis, infrastructure/app setup, testing/dr, customisation, UAT, training, roles and permissions configuration, integration, go live handholding, project management etc etc.
* Indicate in WBS the estimate of effort required from our internal resource, e.g. super users in brand communications (users), our own IT department for technical integration/configuration/sign on work.
* Please supply clear pricing for implementation, one off licencing and annual licencing. Ensure licencing costs include all the modules of your product to meet our requirements.
* Please include a 15% implementation contingency for unknown requirements. Please cost for on premise and cloud implementation, if both options are available.

Please provide a detailed set of assumptions and risks against your WBS.

* As a guideline the upper limit for the implementation and year one costs is 80k+vat (this includes licencing and support).
* We expect a signing payment, followed by a number of staged payments in line with staged production releases and successful UAT.
* Suppliers will be informed by the 8th July if they are successful. Successful suppliers will be asked to move to stage 2 and provided with the brief for onsite product demonstrations, presentations and Q/A.

**Please complete the Pricing Matrix in Appendix I**

**Information Only Questions**

These must be completed but will be used for information purposes only and not scored. It is important that where a question does not apply this is recorded as ‘Not applicable’ or ‘None’ in the spaces provided.

**Pass/Fail Questions**

These criteria will be scored on a pass/fail basis. In the event of a Tenderer being awarded a “fail” against any of these criteria the Tender may be excluded from the process and the remainder of the Tender may not be evaluated.

**Scored Questions**

The Tender Selection Questionnaire will be evaluated and scored. The total score for each section within the Tender Selection Questionnaire will be multiplied by the relevant weighting to produce the final weighted score.

Scores will be awarded from 0-10 as defined by the scoring system set out below:-

|  |  |  |
| --- | --- | --- |
| Score | Definition | Interpretation |
| 10 | Exemplary | Exemplary – comprehensive response, supported by relevant evidence with all requirements covered to a very high standard. |
| 8-9 | Excellent | Demonstrates an excellent level of expertise whilst meeting all requirements. |
| 6-7 | Good | Demonstrates good level of expertise covering all aspects of the system requirement. |
| 4-5 | Adequate | Demonstrates an adequate level of expertise with some aspects missing from the requirement. |
| 1-3 | Inadequate | Provides little or limited evidence of ability to meet the requirement with major deficiencies. |
| 0 | Unacceptable | An unacceptable or irrelevant response that does not address the minimal requirements. |

**PART C**

#### Supplier Selection Questionnaire

#### General Requirements

This section is for **information only** and will not be scored.

|  |  |
| --- | --- |
| 1. **Company Information** | |
| Company or Organisation name | **NOTE: Tenderer to complete this column** |
| Address of Registered Office |  |
| Main contact for communications |  |
| Address of office where the services relating to this appointment will be provided (if different from above) |  |
| Telephone number including code |  |
| Contact e-mail address |  |
| VAT Registration Number (if applicable) |  |
| Company status (Partnership, Limited Company etc.) |  |
| Please provide details of any parent company or ultimate holding company (if applicable). |  |
| If a Limited Company, please provide registration number and date of incorporation. |  |

**This Section will be assessed on a pass/fail basis**.

Has the Tenderer (or its directors or any other person who has powers of representation, decision or control of such Tenderer or who has been identified as part of the Tenderer’s Project team) been convicted of any of the following offences:-

|  |  |  |
| --- | --- | --- |
| **2. Offence** | **Tick if no conviction** | **Tick if conviction exists\*** |
| Conspiracy |  |  |
| * Corruption |  |  |
| * Bribery |  |  |
| * Fraud including: * the offence of cheating the Revenue; * the offence of conspiracy to defraud; * fraud or theft within the meaning of the Theft Act 1968 and the Theft Act 1978; * fraudulent trading within the meaning of section 458 of the Companies Act 1985; * defrauding the Customs within the meaning of the Customs and Excise Management Act 1979 and the Value Added Tax Act 1994; * an offence in connection with taxation in the European Community within the meaning of section 71 of the Criminal Justice Act 1993; and * destroying defacing or concealing of documents or procuring the extension of a valuable security within the meaning of section 20 of the Theft Act 1968. |  |  |
| * Money laundering |  |  |
| * Any other offence within the meaning of Article 45(1) of the Public Sector Directive. |  |  |
| * \* If you have ticked this box please provide details and any action taken to resolve the situation. | | |

Can the Tenderer confirm that it is not, nor has not been subject to the following events:-

|  |  |  |
| --- | --- | --- |
| **3. Matter** | **Tick if confirmed** | **Tick if not confirmed\*** |
| Bankruptcy |  |  |
| * Winding up (other than for the purpose of bona fide reconstruction or amalgamation), receivership or administration |  |  |
| * Conviction of a criminal offence relating to the conduct of its business or profession |  |  |
| * Committed an act of grave misconduct in the course of his business or profession |  |  |
| * Failed to fulfil its obligations relating to the payment of social security contributions |  |  |
| * Failed to fulfil obligations relating to the payment of taxes |  |  |
| * Guilty of serious misrepresentation in providing any information required of him under Regulation 23(1) of the Public Contracts Regulations 2006 enacting Article 45(1) of the Public Sector Directive 2004/18/EC previously |  |  |
| * \* If you have ticked this box please provide details and any action taken to resolve the situation. | | |

|  |  |
| --- | --- |
| **4. General Information** | |
| Does your organisation hold a recognised quality management certificate (ISO9001 certificate or equivalent)?  If yes, please enclose a copy. If no, please describe what arrangements your organisation has made with regards to quality assurance. | Enclosed/Not enclosed (Delete as appropriate)  If NOT enclosed please confirm attachment of quality assurance arrangements |
| Please outline the quality assurance measures / plan you intend to follow to ensure successful delivery of your proposed solution. |  |
| Is your organisation registered under the Data Protection Act 1998? | Yes/No |
| Do you have established procedures for implementing the policy and in particular ensuring that the Data Protection principles are met? | Yes/No  (If Yes please provide evidence) |

|  |  |
| --- | --- |
| **5. Financial Information** | |
| Please provide your organisation’s bank details. Including name and address and contact number for your branch. | * Information Only |
| Falmouth Exeter Plus and Falmouth University may approach your bankers for references; please state here if you permit this. | YES/NO |
| Please provide copies of your organisation’s financial accounts for the last three years. If you do not have sufficient trading history to be able to provide the required information for three years, please provide the information for as many years as are available (minimum one year) and an explanation as to why the information is not available for the full three years. | Enclosed / Not enclosed  (Delete as appropriate) |

|  |
| --- |
| **6. Insurance** |

|  |  |
| --- | --- |
| Please submit copies of the following insurance certificates:   1. Employers Liability insurance (not less than £1,000,000 each and every claim) 2. Public Liability insurance (minimum of £1,000,000 each and every claim) 3. Professional Indemnity insurance (minimum of £1,000,000 any one claim and in the aggregate)   If the tenderer’s insurance cover does not meet the above noted minimum levels, will the tenderer commit to increasing these levels if awarded the contract? | YES/NO |

|  |  |
| --- | --- |
| **7. Contract** | |
| Please confirm that you will complete the Supplier Application form / terms and conditions | YES/ NO |

|  |  |
| --- | --- |
| **8. Sustainability** | |
| Has your company been in breach of environmental regulations within the last five years?  Can you supply evidence on sustainable approaches which have been successfully implemented and how these benefits can benefit our organisations (If no, please describe what arrangements your organisation has made with regards to sustainable approaches. If Yes, please enclose details.  Does your company have an environmental policy (If no, please describe what arrangements your organisation has made with regards to implementation). | YES/ NO  YES/ NO  YES/ NO |

|  |  |
| --- | --- |
| **9. Policies** | |
| The successful bidder should be aware of the following University policies and procedures and shall undertake to follow the same principles over the life of the contract period:  Sustainability and Awareness  <http://www.fxplus.ac.uk/work/sustainability>  Sustainable procurement  <http://www.fxplus.ac.uk/work/sustainability/sustainability-policy-and-strategy>  Health and Safety Policy  <http://www.fxplus.ac.uk/work/health-safety>  Freedom of Information Act  <http://www.fxplus.ac.uk/sites/default/files/documents/fx_plus_foi_charging_policy_oct_2013.pdf>  Please confirm that you agree to follow the principles in these policies during the life of the contract**.** | YES/NO |

**PART E**

**Falmouth Exeter Plus Tender Registration Number 664FALMOUTH**

#### Declaration

Please read and sign the following:

I / We have read the information provided in your Invitation to Tender and subject to and upon the terms and conditions contained in the Tender Documentation, I / we offer to supply the services described in the contract documents in such manner as described.

I / We agree to carry out the required services for:-

The Sum of £ \_\_\_\_\_\_\_\_\_\_\_ (Exclusive of V.A.T)

\*Please Note this quote must include all Travel and Expenses costs\*

I / We agree to hold open this tender for 60 days from the date of Tender.

I / We understand that Falmouth Exeter Plus and Falmouth University retains the right to accept or reject any or all of the tenders received and does not accept any liability for the costs incurred in connection with the preparation and submission of this tender.

I / we certify that the information supplied in the questionnaire and any supporting documents is accurate and valid to the best of my / our knowledge. I / we accept that my/ our response is a bona fide tender and that the Falmouth Exeter Plus and Falmouth University may rely on the information provided in my / our response. I / we understand that false information could result in my / our exclusion from the selection process at any stage.

|  |  |
| --- | --- |
| Signed |  |
|  |  |
| Name |  |
|  |  |
| Position in firm |  |
|  |  |
| For and on behalf of |  |
|  |  |
| Date |  |
|  |  |

**PART F:** **Specification.**

**Please see the appendix High level requirements**