

Teach First, registered charity number 1098294
National Office & London Regional Office
6 Mitre Passage, London, SE10 0ER

Request for Information

OneTeachFirst Programme: Salesforce Implementation Partner

Issue Date: 22 May 2020

Submission Deadline: 7 June 2020, 23.59 hours

PART 1: Instructions and Conditions

1.1 The Opportunity

Teach First is currently exploring its requirements for a Salesforce Implementation Partner to lead on complex areas of the OneTeachFirst Transformation Programme (further details below). As part of this we are issuing this Request for Information (RFI). The purpose of this RFI is to allow Teach First to:

- engage with the market and understand the potential options that are available to meet the requirements
- gain a greater understanding of specific suppliers' abilities, core business and strategic outlook
- systematically identify similarities and differences between suppliers in the market
- finalise our requirements

Any resulting procurement will be conducted competitively. Teach First has no obligations, including to: go to tender; adopt any RFI information received from suppliers; enter a contract.

1.2 Teach First Contact

The following individual is the nominated contact for this RFI.

Name	Natasha Silcox
Title/Position	Procurement Manager
Email address	ProviderContracts@teachfirst.org.uk

1.3 Clarification Questions

Suppliers should direct any queries and questions regarding this RFI by email to the nominated contact.

All questions should be submitted in writing to the nominated email address by no later than 14.30 hours on 29 May.

Teach First may choose to convey responses to submitted questions and queries to all suppliers to ensure that each is equally informed.

1.4 Response Submission

Responses should be sent by the deadline as soft copy to: ProviderContracts@TeachFirst.org.uk

1.5 Confidentiality

Any information Teach First shares in connection with this RFI is strictly private and confidential to Teach First and is being provided to you in confidence. It may not be used by you for any purpose other than the submission of the information requested and must not be copied, reproduced or shared any further (either externally with a third party or internally within your organisation, save as strictly required for the above

purposes). We make no representations or guarantees about the accuracy or completeness of this information; and we accept no liability for it. The copyright in it is owned by Teach First.

PART 2: Background

2.1 Who we are

At Teach First our mission is to build a fair education for all. We're tackling inequality in education by supporting schools serving disadvantaged communities.

We support them in three main areas: recruiting and training great teachers, helping to develop brilliant leaders and connecting them through powerful networks.

2.2 What do we do

Great teachers

We recruit people and develop them into inspiring teachers, working specifically in schools serving disadvantaged communities. And we support them every step of the way as they discover their potential.

Brilliant leaders

Behind every great school is a great leadership team. We support talented teachers to become inspiring and effective leaders at every level through a range of training programmes.

Thriving schools

We connect schools to networks of support. And we work hard to create a positive policy environment. All so schools can make an even bigger difference.

2.3 The OneTeachFirst Transformation Programme

2.3.1 Programme Vision, Scope and Outcomes

The OneTeachFirst Transformation Programme will bring together all process and systems projects in Teach First over the next two years. This will ensure that all of our projects are joined-up to achieve Teach First's key strategies, plan and objectives.

The vision for OneTeachFirst is that

"We and our stakeholders spend more of our time on the things we love, in making a difference for disadvantaged young people".

We need and want to ensure that our processes support the work we do on the frontline. We take pride in the deep relationships we create with schools, trainees, leaders and ambassadors and want to ensure that our processes allow us to do more of this.

The scope of OneTeachFirst covers:

- Our customer experiences across our programmes, schools, ambassadors, funders and other third parties
- Our internal processes
- Our data protection and compliance improvement
- Our technology strategy including Salesforce, Microsoft Office 365 and underlying infrastructure.

These are linked to the outcomes we aim to achieve across each of the transformation projects:

- Improving our trainees, programme members, networks and schools' ability to make a difference
- Spending more of our time making a difference at lower cost
- A single view of the customer, that enables effective reporting and decision making
- Meeting our data compliance obligations
- Embedding best practice in our projects and ways of working

2.3.2 Business Capability Model

We have mapped our organisation against our 'Business Capability' ¹model. This model provides us with a common framework and language on what we do at Teach First. It ensures that this programme is led by the priorities of the organisation and maps this to overall programme vision and benefit areas. It also reinforces that this programme is a wholesale transformation led by where the organisation would like to be in the future, rather than a technology-led project. Using this model, we have carried our extensive analysis of current painpoints of all our key activities for the whole organisation.

Core Delivery	1. Develop Programmes and Services	2. Market and Sell programmes and services	3. Deliver programmes and services
Strategic relationships	4. Build school partnerships	5. Develop networks and Ambassador value	6. Secure funding and manage external relationships
Enablers	7. Develop and implement strategy	8. Manage people, technology, finance and assets	9. Manage capabilities, compliance and risk

¹ Further details in appendix 1

Our analysis has exposed the following key issues:

- many of our existing customer journeys, systems and processes are complex, manual and fragmented. This results in excessive effort to deliver processes and provides poor experiences to our customers through their lifetime with Teach First.
- we use spreadsheets and other data sources 'off-line' that create data risk and mean we cannot easily report, analyse or gain insights from our business data.
- we are evolving our offering with a multi-programme strategy, but our underlying systems and data structures were not designed or built with that in mind and so cannot enable this strategy in a consistent, simple way.
- our current version of Salesforce is no longer fit-for-purpose and struggles to deal with new change in line with best practice. We are therefore unable to use it to its full potential or use new technologies and tools to optimise our business

PART 3: Salesforce

3.1 Background

Teach First has been a customer of Salesforce since the early days of the charity. Whilst the organisation has an active instance used by staff, the platform is not fit-for-purpose and does not meet our needs.

The platform is highly customised and has numerous integrations with external applications (eg .NET and Drupal) and customer-facing portals. Its main data model was focused on our core teacher-training programme. Since then, Teach First has expanded its range of programmes and adding these new programmes into Salesforce has been complex and challenging. This has resulted in inconsistent customer journeys, difficulty in making change happen and has been time-consuming and expensive to maintain. Staff have felt frustrated and disengaged by this experience.

3.2 The future with Salesforce

Our vision for Salesforce is simple and links to the vision of the programme:

Our power engine Salesforce enables us to make a difference for young people. It sits at the core of everything we do. It is our single source of truth

Salesforce must be the driving technology that sits at the centre of everything we do at Teach First. It must help us drive organisational outcomes and impact. The platform must be trusted and valued by all of its users. Our staff must have confidence in its data and find it easy to use. It must support staff in their work so that they can spend less time on administration and process and more time on high-impact activities with our customers and stakeholders. To achieve this, we must have clear 360-degree views of all of our key stakeholder groups. We must provide our users with simple, easy journeys, so that they love working with us. We must have reliable data so that we can generate insightful reports, create rich knowledge and make powerful decisions.

We are excited by the possibilities of what Salesforce can do for us which is why it is our chosen enabling platform that will help achieve our targeted benefits and outcomes. We have identified significant opportunities to transform Teach First's processes by using Salesforce. We expect to use innovative solutions in Salesforce to transform our ways of working - driving significant improvements in efficiency, effectiveness and experience. Through the transformation programme, we will remove the administrative, non-value-add tasks from our staff customers and stakeholders, so that we can all spend more time seeking to improve the educational outcomes of disadvantaged children and young people.

3.3 Technical Scope

The OneTeachFirst Transformation Programme recognises that in order to provide a strong foundation for true transformation, implementation will need to be carried out in a new instance of Salesforce, and with a shift from Salesforce Classic to Lightning Experience. This will allow Teach First to use Salesforce's latest features as they're released and will allow for greater flexibility and change in business processes.

On top of Salesforce's Lightning platform, it is currently foreseen that the EDA (Education Data Architecture) package will be leveraged to make use of the best practices within the sector and to leverage out-of-the-box features.

With Teach First's introduction of EDA, move to Lightning Experience and redesign and re-engineering of business processes, this programme should be considered 'green-field' from a Salesforce perspective. All current business and technical processes are up for re-evaluation. This is not a 'lift and shift' project of moving our current instance in to a lightning ready Salesforce. Similarly, it will involve real transformation rather than evolutionary continuous improvement. Our processes need rethinking and our Salesforce solutions need redesigning.

As part of the programme, there will be significant data clean-up and migration challenges.

The new Salesforce environment will likely consist of a mixture of Salesforce-native products and ISV (Independent Software Vendor) applications. Where possible, Salesforce's own products will be adopted to minimise integration efforts and to utilise their best-in-class standards. Where there are critical gaps, we may choose to select products outside of the Salesforce-native offering.

Based on the information we gathered to date (which is limited as we are in the early stages of discovery), a possible view of the future state of Teach First's technology architecture can be seen in Figure 1. This should only be used to give you a flavour of the types of Salesforce products we are likely to need in the future. This will be developed over the coming months. We are very open to further debate and discussion around the target operating model.

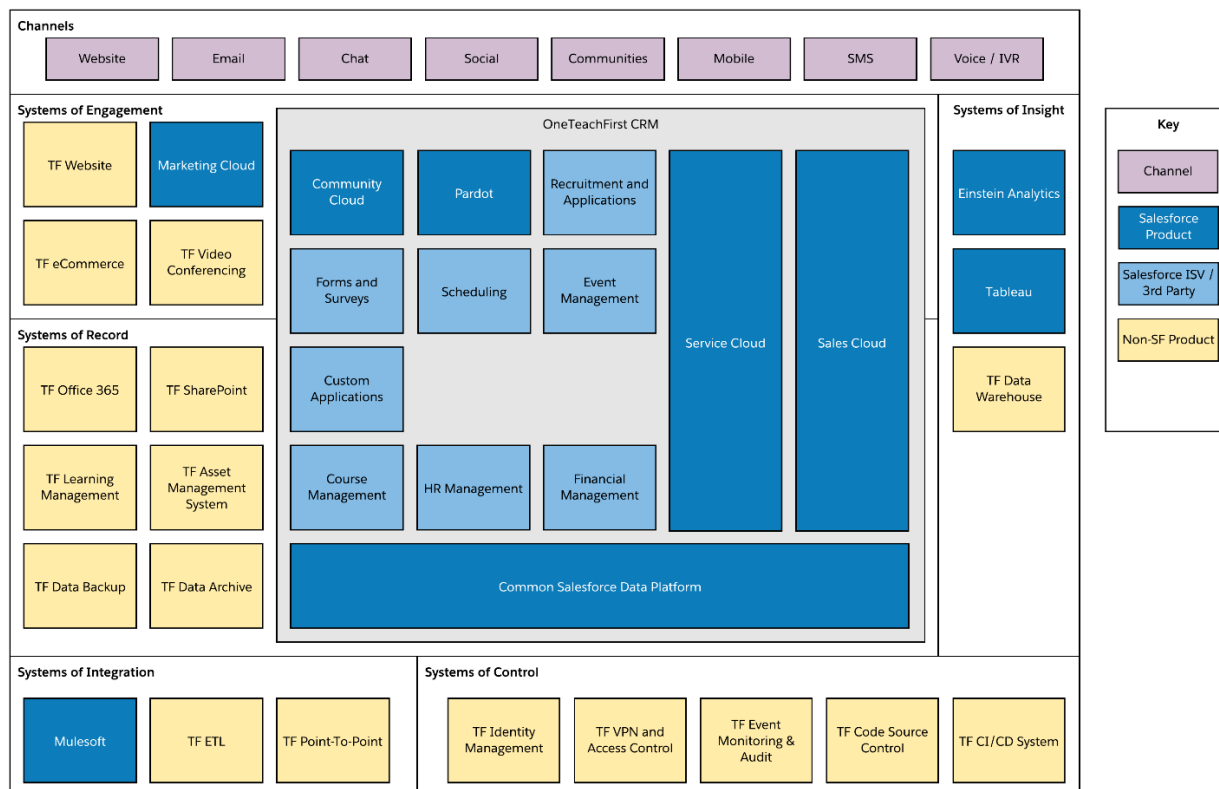


Figure 1 – Illustrative view of technology architecture future state - only to be used as an example.

PART 4 : Salesforce Implementation Partner

4.1 Nature of relationship

To help us achieve our vision, we are looking to procure the services of an outstanding Salesforce Implementation Partner. The successful partner will not only have exceptional experience in delivering high value transformation projects with clearly defined benefits achieved but will also understand and value the need for a strong partnership. We know that many experienced consultancies exist in the market who may have consultants available and will deliver projects as defined by their customer - we are looking for more than this.

The successful partner must understand that success is only achieved when technical changes are aligned to process and people change and fully embedded into the organisation. They must understand we are looking to be 'transformative' - this means we expect to be challenged on solutions and we expect our partner to provide us with innovative ideas to reshape our future. This is far more than just delivering projects. We are expecting shared ownership of the transformation programme. The successful partner will be committed and flexible – helping to ensure that we respond fully to the challenges and opportunities our organisation faces and that we realise our full potential.

The successful partner must have extensive experience of working with organisations using the Education Cloud. They must have highly experienced, certified resources readily available to meet the pace of this project. These resources are expected to work closely with the internal team ensuring we deliver together. We expect the successful partner to be involved from the start of a project - understanding our user journeys, redesigning

our processes, providing innovative solutions, delivering projects in line with agile methodology, training (both technical and user) and overseeing the projects being embedded within Teach First. All projects must achieve targeted benefits which the successful partner will help to define and will own with us.

4.2 Quality Expectations

We require a partner who will be able to work in partnership with us to deliver our projects in a timely, reliable and professional manner in conformity with Salesforce best practice; meeting defined milestones and deliverables. The agreed services will be subject to monitoring by Teach First in line with the KPIs and SLAs agreed with the successful partner.

We expect solution designs to be leveraged from the latest Salesforce products and processes and embedded into our instance in ways that will be simple to maintain and support. All development is expected to have 'cooling-off' periods, in which small changes and bugs will be expected to be managed and acted on.

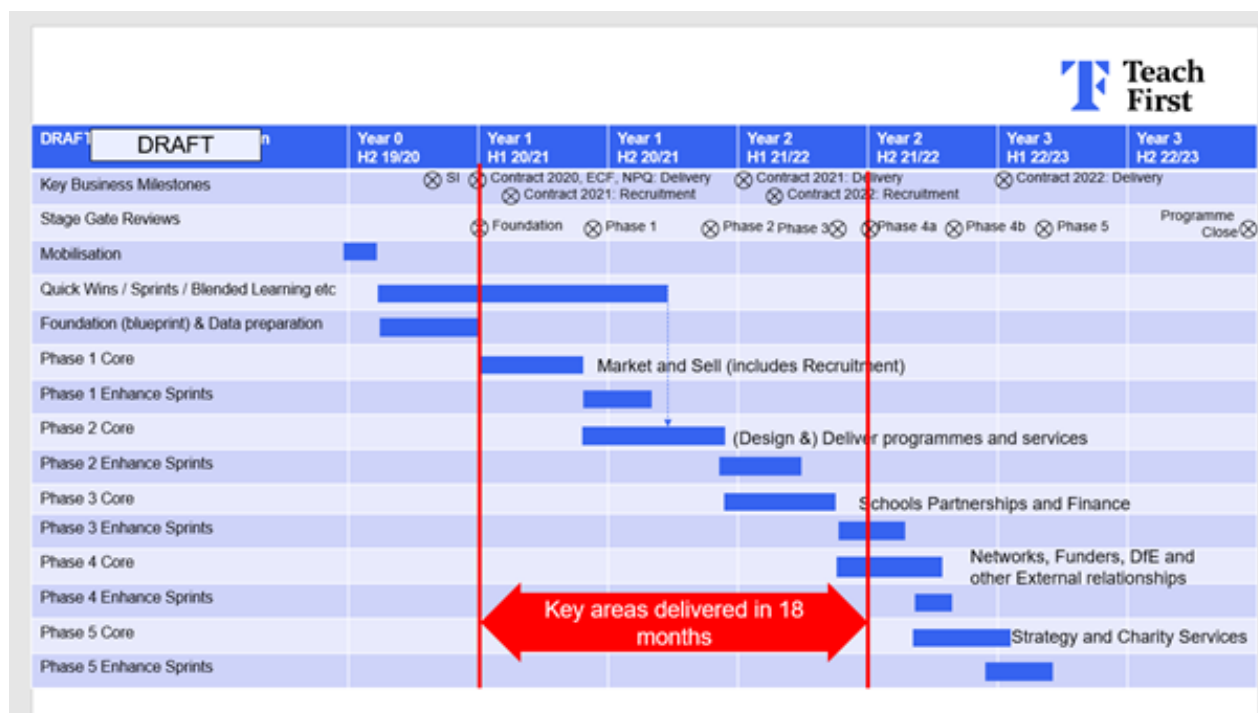
The successful implementation partner needs to have a demonstrable quality management system that underpins the control and performance of project deliverables.

We also expect, once projects have been delivered successfully, that the partner will provide us with reassurance that solutions are the latest on the market. We will verify all solution designs with our internal Technical Lead and Salesforce Customer Success Architect. We are also establishing a 'Technology Committee' which the successful partner will support, providing updates on progress and achievements. If designs are challenged, they will be expected to act upon this without material additional expense to Teach First.

4.3 Deliverables

We want to deliver transformation and change at pace. We know there is lots to do but we also know, if done correctly, we can quickly add value to Teach First (and therefore its customers and beneficiaries).

Our challenge is to deliver the bulk of the deliverables and benefits from the programme within 12-18 months, commencing from September 2020. We expect to target the projects that will add most value first in order to realise benefits quickly from the programme. We expect to use an agile methodology to support the pace of delivery. Below is an indicative delivery timeline beyond September.



The combination of the timeline and the architecture shown above gives as much insight into the nature and content of the programme as we can share at this time.

4.4 Costs

Our budget is being worked through. We are looking to secure an implementation partner who has a keen interest in Teach First's vision and wants to join us to ensure that every child, regardless of their background, is able to fulfil their potential.

As part of this relationship we would welcome an implementation partner who will be willing to provide us with a substantial discount and/or a pro bono offering.

PART 5: Information to be provided

1. Organisation

- 1.1. Please provide the following general information:
 - 1.1.1. Full legal name of the company
 - 1.1.2. Registered address
 - 1.1.3. Website address
 - 1.1.4. Total number of employees
 - 1.1.5. Relationships with any parent company (if applicable)
 - 1.1.6. Primary contact in charge of RFI response
- 1.2. Please provide an overview of the company:
 - 1.2.1. Please specify the history and background of the Salesforce division
 - 1.2.2. Please specify the Salesforce areas you specialise in
 - 1.2.3. Please provide information on the team, qualifications, certifications and awards
 - 1.2.4. Your expertise in process design and business change
 - 1.2.5. Security standards your company has been awarded (such as ISO27001, Cyber Essentials etc.)
- 1.3. Why is your organisation a good fit with Teach First?
 - 1.3.1. Briefly talk about your competitive advantage over other Salesforce System Integrators/ Implementation Partners

2. Capability and Experience

- 2.1. Please provide examples of two case studies which show clear demonstration of transforming an organisation's processes using Salesforce as the enabling platform. Include:
 - 2.1.1. Background and project objectives, duration and an indication of spend
 - 2.1.2. How you engaged with your client to analyse and design process and capabilities
 - 2.1.3. How Salesforce was used to transform the organisation's processes
 - 2.1.4. How innovative solutions were suggested by your team
 - 2.1.5. Your responsibilities for business change and implementation
 - 2.1.6. The full project team on the programme and the ways of working
 - 2.1.7. A breakdown of benefits achieved in the form of RoI or improvements in key measures
 - 2.1.8. The key challenges and lessons learnt
 - 2.1.9. References
- 2.2. Please provide examples that demonstrate your organisation's experience and capability in each of the relevant technologies, including certified resources. It is important that you clearly state the role that your company played in the delivery and how this can be verified
 - 2.2.1. Sales, Marketing and/or Service
 - 2.2.2. Salesforce Community Cloud
 - 2.2.3. Salesforce data insight products i.e. Tableau and/or Einstein
 - 2.2.4. Salesforce integration and API tools
 - 2.2.5. Salesforce ISV Applications
 - 2.2.6. The Education Cloud
 - 2.2.7. The Education Data Architecture model

3. Resourcing

- 3.1. Please describe your capabilities and resources that would be needed to deliver a project of this scope, including account management, assurance, project management, technical, business analysis and change. What is your typical timescale for mobilisation (from contract signature to bringing the team onboard) and do you have resources available?
- 3.2. Please describe your capabilities and resources required to manage the Salesforce service after rollout, along with any case studies to evidence good practice. What is your usual approach to training for both internal and client resources?

4. Project Management

- 4.1. Please provide an overview of your organisational approach and experience of Agile development approach, Scrum, scaled Scrum and Kanban and how you expect to work with our internal Salesforce team to ensure the project is successful.

5. Commercial Model

- 5.1. Using the information that you have read and using your experience of multi-year business transformation programmes, what do you estimate to be your proposed cost?
- 5.2. What pricing models would you propose for this type of contract to ensure that Teach First achieves the benefits from its investment in this programme?
- 5.3. Acknowledging that we are charity and looking for a long-term relationship, what discounts and pro bono opportunities can you provide us? Please provide us with indicative discounts and details where possible.
- 5.4. Please provide details of indicative rates

Resource Type	Commercial price range/ daily rate	Non-profit price range/daily rate
Business Architect		
Solutions Architect		
Technical Architect		
Programme Manager		
Project Manager		
Salesforce Sales Consultant		
Salesforce Marketing Consultant		

Senior Admin		
Developers		
Tester		
Trainer		

6. Additional information

6.1. Are there any additional capabilities and areas which you would like to highlight?

Appendices

Business Capability

Core Delivery

Develop Programmes and Services

- Govern and manage product/service development**
 - Manage product/service portfolio (e.g. evaluate performance of existing programmes, confirm alignment to strategy, prioritise programme/product concepts etc.)
 - Manage lifecycle of a programme/product (introduce/retire products/services)
 - Manage regulatory requirements
- Generate and define new product/service ideas**
 - Discovery research
 - Generate concept
 - Define requirements
- Develop products/services**
 - Design product/service (e.g. modules/ curriculum, technology)
 - Test market for new/revised products/services
 - Prepare for service delivery

Market and Sell programmes

- Marketing (mass and targeted)**
 - Marketing approaches (e.g. social media, events, alumni engagement, schools)
 - Approaching potential leads
- Manage Leads/Opportunities**
 - Expression of interest
 - Eligibility check
 - Conversion of Lead
- Application**
 - Start application
 - Monitor application
 - Submit/unsubmitted applications
- Selection**
 - Application Reviewed
 - Any other selection activities (e.g. Development Centre)
 - Offer made
- Enrolment**
 - Accepts offer (e.g. agreement signed)
 - Mandatory activity before starting programme (e.g. references, completing degree, modules to take, sign up to portal, financial aid etc)
- Cultivation**
 - Optional activity before starting programme (e.g. engaging with pre-content before course)

Deliver programmes and services

- Deliver curriculum/content for programme**
 - Events e.g. 1:1s, conferences (source venue and speakers, logistics, registration, attendance & absence requests etc, content delivery, event surveys)
 - Online
- Assess and monitor trainee/programme member progress**
 - Scheduling and performing assessment (e.g. observation, reviewing modules, survey etc, [on going](#) support)
 - Risk rating
- Support at-risk/under achieving programme members/trainees**
 - Support plan
 - More informal extra support
 - School transfer, deferral, withdrawal
- Monitor external support**
 - Mentors, coaches, tutors
- Trainee/Programme Member Ambassador transition**

Strategic Relationships

Build school partnerships

1. **Market to targeted schools**
2. **Assess school/Multi-Academy Trust (MAT) relationship**
 - School requirements
 - Suitability assessment (includes risk)
 - Supply and demand (e.g. targets)
3. **Manage school/MAT relationship**
 - Access to programme/or product (e.g. application/requests for trainees, handovers)
 - Programme/product preparation (e.g. assigning in-school support, agreements, further assessing risk and giving extra support where needed)
 - Relationship monitoring (e.g. point of escalation for issues, maintaining relationship if not requested any support)
4. **School Finance**
5. **Track school improvement?**
6. **Account Management Escalation**

Support external networks* and ambassador value

1. **Manage Leads/Opportunities**
 - Marketing approaches (e.g. social media, events, meetings)
 - Expression of interest (for setting up a network or joining a network)
 - Eligibility check
2. **Managing network stages**
 - Structure & planning
 - Marketing approaches (e.g. social media, events, meetings)
 - Supporting network delivery
 - Financial support (bidding process)
3. **Monitor ambassador data and engagement**
 - GDPR compliance (e.g. marketing preferences, data management etc.)

Secure charity funding and Manage external relationships

1. **Secure voluntary funding**
 - Manage Leads/Opportunities (identify)
 - Cultivate (school engagement and events)
 - Ask
 - Donate
 - Steward
 - Fundraising events
2. **Manage government relationships**
3. **Manage relationship with Board of Trustees**
4. **Manage public relations and communications**
5. **Manage legal and ethical**
 - Create ethics policies
 - Manage corporate governance policies
 - Develop and perform preventive law programmes
 - Ensure compliance
 - Protect intellectual property

Enablers

Develop & Implement Strategy

1. Define the Theory of Change and long-term vision
2. Develop business strategy to deliver impact and customer experience
3. Execute and measure strategic initiatives
4. Develop and maintain business model

Manage People, Technology, Finance and facilities

1. Develop and manage human resource planning, policies, and strategies
2. Recruit, source, and select employees
3. Manage onboarding, development and training
4. Manage employee relations
5. Reward and retain employees
6. Redeploy and retire employees
7. Manage employee information and analytics
8. Manage employee communication
9. Develop and manage Technology customer relationships
10. Develop and manage Technology strategy
11. Develop and manage Technology resilience and risk
12. Manage information
13. Develop and manage service solutions
14. Deploy service solutions
15. Create and manage support services/solutions
16. Perform planning and management accounting
17. Perform revenue accounting
18. Perform general accounting and reporting
19. Manage fixed-asset project accounting
20. Process payroll
21. Process accounts payable and expense reimbursements
22. Manage treasury operations
23. Manage internal controls
24. Manage taxes
25. Plan and acquire assets
26. Design and construct productive assets
27. Maintain productive assets
28. Dispose assets

Manage Capabilities, Compliance and risk

1. Manage enterprise risk
2. Manage compliance
3. Manage business resiliency
4. Manage business processes
5. Manage portfolio, program, and project
6. Manage enterprise quality
7. Manage change
8. Develop and manage enterprise-wide knowledge management
9. Measure and benchmark
10. Manage environmental health and safety
11. Develop, Manage and Delivery Analytics