

**HM REVENUE & CUSTOMS**  
**REQUEST FOR QUOTE – PART 1**

<b>Title:</b> Name of project / requirement / role	Customer Lab Research Capability
<b>HMRC Reference:</b> To be quoted in all correspondence	SR250751493
<b>Date issued:</b>	07/11/2019
<b>Deadline for Responses:</b>	28/11/2019

1. Contact Details			
<b>Issued to:</b>		<b>From:</b>	HM Revenue and Customs
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2. Details of Project / Requirement / Role
<p>The aim of this assignment is to support and build the longer term development and capability of researchers working within HMRC's Customer Lab function.</p>
3. Specification of Requirements
<p><b>3.1. Introduction</b></p> <p>The aim of this assignment is to support and build the longer term development and capability of researchers working within HMRC's Customer Lab function.</p> <p>Key objectives include:</p> <ol style="list-style-type: none"> <li>1. To develop a capability building approach that builds ongoing and advanced skills and confidence in delivering in-house research in a proportionate, fit-for-purpose way that is cleared with the Head of Customer Research.</li> <li>2. To design and deliver formal training packages that build capability, ensuring that appropriate tools and techniques are developed to help maintain capability over time.</li> <li>3. To fulfil the ad-hoc training needs of the Customer Lab as it grows in functionality</li> <li>4. To provide ongoing 1-2-1 coaching and support to help individual team members proactively apply</li> </ol>

their learning to ongoing research projects

### 3.2. Background

HMRC has a long-standing commitment to ensuring its operations and policy decisions are informed by high quality, timely research. This research is largely delivered through external contractors who deliver externally commissioned, independent research for the Department. To complement this approach, HMRC has now built its capability and capacity to deliver small-scale, fast turnaround qualitative research in-house, through a 'Customer Lab'. Delivering this work in-house saves time and cost for small-scale projects, and helps ensure HMRC staff retain the knowledge gathered from delivering the research internally, rather than this knowledge being held by external research contractors.

HMRC has already launched two Customer Labs, in Canary Wharf (London) and Shipley (near Leeds). They are due to relocate to Manchester and Stratford (London) respectively by 2021. The Labs are considered to be in line with industry best practice – both include space for the delivery of a range of different qualitative research methods, both also include viewing facilities, video-relay equipment and allow for visual and audio recording for the rapid generation of data for analysis.

Customer Lab projects are resourced by existing HMRC research specialists. Most HMRC researchers are experienced in research design, procurement and the management of externally commissioned research, rather than the design and delivery of primary qualitative research themselves, in-house. However, all researchers have gone through a package of foundation level training. This was delivered through specialist support from a highly experienced qualitative researcher who worked with our team to build our capability in designing, delivering and analysing qualitative research with our customers.

We would now like to expand our in-house qualitative research skills and therefore require specialist support to help build the longer term development and advanced capability of researchers working within HMRC's new Customer Lab function. Foundation training of new recruits to the team will also be required.

### 3.3. The Requirement

The first phase of this assignment would include a period of orientation and briefing to ensure the successful contractor understood the nature of the Department's requirement and the desired outcome(s). We would envisage this including an inception meeting with the Head of Customer Research and several Principal Research Officers in the team to ensure an accurate understanding of HMRC's vision in this area, the internal research work undertaken to date, the intended pipeline of internal research and how we plan to develop the Customer Lab function over time.

We envisage that the successful contractor will deliver two overall packages of work, as outlined below:

#### **Work package 1: Design and deliver advanced level qualitative training**

This work package would involve building on the foundation level of the capability building training (delivered

last year) to include more advanced level training to support the growth of the Customer Lab function and the HMRC staff who will be delivering the research. We would expect the successful contractor to fully scope, design and deliver advanced level training modules on:

- Co-design and co-creation techniques
- Deep-dive: collaborative analysis and best practice
- Advanced facilitation skills
- Deep-dive: managing in-house fieldwork teams and best practice
- Insight generation and ideation techniques
- Workshop techniques and industry-leading methods linked to the development of customer journeys

We are happy for the potential contractor to propose other topics on advanced qualitative research practice for inclusion (and this can be discussed with and agreed by the Head of Customer Research). We would also require the successful contractor to be able to work flexibly to scope, design and deliver ad-hoc research training as and when training gaps are identified in the team.

This formal training should be delivered through a mix of theoretical training and applied, practical sessions. It should also draw on real examples from projects the team has worked on, or draw on exercises that the contractor uses that replicate real world research projects (ideally in a tax-specific context) that are similar to those that the team are likely to deliver.

We would expect this formal phase of training to be delivered through up to five whole day training sessions with the team, at HMRC premises in central London. Any materials used should be made available to HMRC to keep and re-use for further in-house refresher sessions. HMRC premises would include facilities for delivering PowerPoint presentations (or similar) and space for breakout groups. We envisage these training sessions being delivered to team members face-to-face.

The training materials must be tailored to our specific requirements and will be used by us for future training. HMRC require the Intellectual Property Rights of all training and guidance materials produced for, and delivered to, our staff in this phase of work in accordance with D8.3 of the draft contract included as an attachment to this tender exercise.

## **Work package 2: Maintain and deliver foundation level of training**

This work package would include the maintenance and delivery of an adequate foundation level of training for new starters who join the team. The previous foundation level training took place in 2018 and the training materials are in place in the form of three PowerPoint presentations for the successful contractor to redeliver to new starters and anybody in the team who missed the original training. **These PowerPoint**

**presentations are available to view on request.** The successful contractor may also decide to re-scope, design and deliver new foundation level training if this is preferred. The foundation level consists of the following modules delivered across 3 days:

- What is good customer qualitative research?
- Research methods
- Customer relationships, co-creation and co-design
- Sample design and recruitment
- Research ethics
- Fundamentals of interviewing
- Conducting focus groups
- Dealing with emotions
- Developing stimulus and projective/ creative evaluation techniques
- Fundamentals of discussion guides
- Principles of analysis
- Reporting
- Action planning workshop

As well as the work packages described above we require the successful contractor to provide ongoing support and coaching to help individual team members apply their learning when delivering in-house primary research projects. This may involve talking through the opportunities that will exist to apply learning, what support they think they will need and how they will reflect on their future experiences constructively to draw out what is working well and how they can continue to build their experience. We would expect the successful contractor to act as a 'critical friend' at certain points during a project such as observing focus groups and providing feedback, and taking part in collaborative analysis sessions to help apply learnings and embed best practice.

### **Deliverables**

The key deliverables required include:

- Scoping / kick-off meetings - progress meetings before the start of each work package (although some work packages may run simultaneously), in addition to the scoping / kick-off meeting. All to be held at HMRC's London offices in 10 South Colonnade, Canary Wharf.

- A scoping note proposing a clear approach to delivering bespoke training and coaching for the two work packages to help plug gaps and develop advanced skills and experience in in-house primary research
- The delivery of draft advanced level training materials for review by our Head of Customer Research and our Customer Lab lead, to ensure any proposals are aligned with Government protocols around the delivery of research, HMRC-specific processes / parameters and HMRC's customer base.
- The delivery of:
  - Foundation level qualitative training for the new team members – likely through several day-long training sessions.
  - Advanced level qualitative training for all team members – likely through several day-long training sessions

### 3.4 Key Performance Indicators (KPI)

KPIs will be confirmed with the successful contractor at point of award.

### 3.5 Procurement Timeline

The timings given below are desired.

Ariba event opening	7 <sup>th</sup> November 2019 – 12pm
Submit clarification questions	7 <sup>th</sup> - 18 <sup>th</sup> November 2019
Deadline for HMRC to answer clarification questions	22 <sup>nd</sup> November 2019
Deadline for Ariba submissions	28 <sup>th</sup> November 2019 – 12pm
Contract awarded / Phase 1 – Orientation and briefing	December – February 2019/2020
Phase 2 – Understanding Capability	December – February 2019/2020
Phase 3 – Design and delivery of formal training	December – February 2019/2020
Phase 4 – Coaching / 1-2-1 support and development of training materials	December – February 2019/2020

### 3.6 Contract Length 12 Months.

The contract would start on 17<sup>th</sup> December 2019 and end on 16<sup>th</sup> December 2020 (To be Confirmed). There is also an option for a 12 month extension.

## 4. Tender Responses

## Weighting Requirements

The high level criteria that will be used for this procurement are as follows:

- **Quality – 80%**
- **Cost – 20%**

## Scoring

The following criteria will be used to evaluate your proposals.

- Understanding of objectives (10%)
- Appropriateness of proposed approach to delivering the two work packages (30%)
- Relevant experience of individual or project team and ability to deliver the work (28%)
- Social, Environmental and Security Criteria (2%)
- Risks, mitigation and quality assurance processes (10%)
- Cost (20%)

Tenders will be evaluated using the scale below:

Score	'Open' Question Criteria
100	The response is excellent and completely relevant. The response is comprehensive, unambiguous and demonstrates an excellent understanding of, and meets, the requirements in all aspects, with no clarification required. The response is well thought out and/or provides <ul style="list-style-type: none"> <li>• highly credible examples;</li> <li>• benefits; or</li> <li>• innovation</li> </ul>
80	The response is good and highly relevant. The response indicates a good understanding of the requirements and provides sufficient detail across all areas. The response demonstrates how the requirements will be met in the main, which may require minor clarification only.
60	The response is satisfactory and relevant. The response indicates a satisfactory understanding of the requirements in most aspects, although may lack detail in certain areas. The response suggests that the requirements would be met satisfactorily, but may require some clarification.
40	The response is limited and partially relevant. The response indicates partial understanding of the requirement. The response contains ambiguities which suggests that the requirements would not be met unless significant revisions were made to the proposal.
20	The response is poor and only partially relevant. The response addresses some aspects of the requirements but contains insufficient/limited detail or explanation. The response demonstrates only limited understanding of the requirement. The response contains deficiencies which suggest the requirements would not be met.
0	The response is not considered relevant. The response is unconvincing, flawed or otherwise unacceptable. Response fails to demonstrate an understanding of the requirement.

## Tender Proposals

The proposal should be no longer than 20 pages including appendices with a font no lower than size 10. It should specify who will be responsible for delivering this project and, if more than one person, should provide detail of the input into the project that will be provided by each named person. The proposal submitted should include:

### Background:

- Understanding of the training contract needs
- Evidence of your understanding of the business area and knowledge and expertise in relation to the project's objectives

### Your suggested approach/method:

- Your suggested approach for each work package

### Project Management:

- Details of all individuals who will be working on the project and evidence of their ability to deliver the aims of the project (including detail of the input into the project that will be provided by each named person if more than one person will be responsible for project delivery)
- Whether any part of the project will be subcontracted and if so to whom.
- Evidence of capacity to deliver the requirement in the specified timeframe
- Timetable for delivering the work including key milestones
- Details of main risks to the project as you see them and the contingencies you will use to manage them

### Costs Proposal:

- Please provide a full breakdown of costs, to be presented as a resource profile, giving a breakdown of the resources in person days to each task (see **Appendix A** which is provided as an attachment at *Award Criteria – Schedule E Pricing Schedule (3.3.1)* in the tender event)

The successful tenderer will be awarded a fixed price contract for the project. HMRC observes the general practice of paying only for work satisfactorily completed. We anticipate payment terms to adhere to the following schedule. These will be invoiced separately.

- 30% on commission
- 40% on the commencement of work package 1

- 30% on the commencement of work package 2 and completion

When costing proposals it would be helpful to ensure we can see costs for the two work packages. **Bidders should also provide two separate costs for work package 2** – the first cost to redeliver our existing foundation materials and the second cost to fully scope, design and deliver the work package:

- Work package 1: scoping, design and delivery of advanced level qualitative research training
- Work package 2: (scoping, design and) delivery of foundation level qualitative training

Please also include a day-rate for any individuals who may work on other ad-hoc training modules as yet unspecified that the team will be interested in over the period of contract.

Please let us know on receipt of this brief whether you think there will be any conflict of interest in your submitting a proposal.

#### **5. Documents required in response to this Request for Quote**

**As part of the E-Sourcing event suppliers are required to answer all of the questions contained within the questionnaires.**

Tender or ITT responses should be submitted electronically using the Client's eSourcing tool. Accessibility needs, which cover a range of disabilities, should be highlighted to the Client at the earliest opportunity if it felt that they may hinder the Tenders' ability to provide a response.

**6. Further information**

Travel to and from the Primary Location will be met from the day rate.

Expenses are payable where travel to other locations is required as part of the assignment forming part of this agreement. Where an overnight stay is required HMRC will pay for actual bed and breakfast costs within the current maximum limits detailed below. Any other subsistence or incidental expenses are not payable. Receipts must be provided.

<b>Short-term Night Subsistence Allowances Bed &amp; Breakfast Capped Rates Effective from 01/04/17</b>	
<b>Location</b>	<b>Maximum Nightly Rate</b>
London / within M25	£130 per night
Bristol, Heathrow airport	£100 per night
Oxford, Portsmouth	£95 per night
Elsewhere	£90 per night
<b>Travel</b>	
Mileage Allowance	25 pence per mile
Rail Travel	Standard Class
Air Travel	Economy Class

Hotel Reservation and Tickets shall be booked via HMRC's travel and hotel booking service. Further information will be provided by the HMRC Work Manager. Bookings should always be approved by the HMRC Work Manager.

All other expenses will be payable at the discretion of HMRC. The Contractor shall not incur any such expenses without the prior approval of the HMRC Work Manager. Any expense incurred by the Contractor without prior approval shall not be reimbursed.

Costs should include all fees and expenses but exclude VAT.

**SAP Ariba:**

Please can you ensure you are registered with the HMRC SAP Ariba to gain access to the procurement tender documentation when it is released.

The registration link is: <http://hmrc.supplier-eu.ariba.com/ad/register/SSOActions?type=full>

As part of the registration process you will receive a system generated email asking you to activate your SAP Ariba supplier account by verifying your email address. Once you have completed the activation process you will receive a further email by return confirming the 'registration process is now complete' and providing you with 'your organisation's account ID' number.

If an email response from HMRC is not received within one working day of your request, please re-contact [sapariba.hmrcsupport@hmrc.gsi.gov.uk](mailto:sapariba.hmrcsupport@hmrc.gsi.gov.uk) (after first checking your spam in-box) notifying non-receipt and confirming when your registration request was first made.

Once you have obtained 'your organization's account ID' number, please email [e.procurement@hmrc.gov.uk](mailto:e.procurement@hmrc.gov.uk) with your account ID number.

Once you have complied with the foregoing you will receive an e-mail confirming access to the procurement event.

Further information about HMRC's procurement tool SAP Ariba, a Suppliers Guide and general information about supplying to HMRC is available on the HMRC website:

[www.hmrc.gov.uk/about/supplying.htm](http://www.hmrc.gov.uk/about/supplying.htm)

If you have already registered on SAP Ariba then you may also need to re-register on HMRC's SAP Ariba in order to be added to the event.

## **7. HMRC minimum requirements**

7.1 This requirement will be carried out using HMRC Standard Short Form Contract which is attached in section 1 (1. Attachments) of the event.

7.2 As a result of government policy to achieve greater transparency in public procurement and help deliver improved value for money, HMRC is obliged to publish tender documents for all contracts with a whole life value of over £10,000. There is a further obligation to publish all contracts with a whole life value of over £10,000 with effect from January 2011. It is a condition of bidding for this work that applicants accept these obligations and agree to the subsequent publication of the contract once awarded.

7.3 By submitting a response to this Request For Quote the Client will deem that you accept the above HMRC minimum requirements.