Cyclists Welcome

Site development

Request for Proposal

June 2021

Contents

1   Introduction

1.1   Confidentiality Clause

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Tenderers must seek the approval of Cycling UK before providing to third parties any information provided in confidence by Cycling UK or its professional advisers and must maintain a register of all employees and third parties who have or have had access to such information. If so requested by Cycling UK, tenderers must make such a register available for immediate inspection by Cycling UK or its duly authorised representatives. The sharing of this information with any third party sub-contractor is also bound by the provisions.

1.2   Intellectual property

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Cycling UK reserves the right to change any aspect of, or cease, the tender process at any time.

The information contained in this ITT is subject to constant updating and amendment in the future and is necessarily selective. It does not purport to contain all of the information which a tenderer may require. While Cycling UK has taken all reasonable steps to ensure, as at the date of this document, that the facts which are contained in this ITT are true and accurate in all material respects, Cycling UK does not make any representation or warranty as to the accuracy or completeness or otherwise of this ITT, or the reasonableness of any assumptions on which this document may be based. All information supplied by Cycling UK to the tenderers, including that contained in this ITT, is subject to the Supplier's own due diligence. Cycling UK accepts no liability to tenderers whatsoever and however arising and whether resulting

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Cycling UK may exclude any tenderers from the tender process who have been found to be in breach of confidentiality or intellectual property rights and may pursue any remedy or take any other action for breach as it considers appropriate.

Cycling UK shall have the right, at its request, to require unsuccessful respondents immediately to return or destroy all documents and other materials and working papers relating to this project and all copies thereof and to destroy all electronic copies. The respondent shall, at Cycling UK's request, be required to confirm in writing that all such information has been returned or destroyed.

Cycling UK may use the information included in a tenderer's response for any reasonable purpose connected with this ITT. In particular, once a tenderer has been excluded, Cycling UK reserves the right to use any ideas contained in that tenderer's bid in any ongoing discussions with other tenderers but undertakes not to reveal the identity of the provider of such ideas.

Respondents should note that any quantities or volumes contained in this ITT are indicative only and any future quantities or volumes may vary from those stated.

It is the responsibility of suppliers to obtain for themselves, at their own expense all additional information necessary for the preparation of their response to this ITT. No claims of insufficient knowledge will be entertained.

Any supplier who directly or indirectly canvasses any employee of Cycling UK, whether they work for the representational arm of Cycling UK, or any member of their respective committees or working parties concerning the award of the contract will be disqualified.

All suppliers are recommended to seek their own financial and legal advice.

2 Context and project requirements

2.1 Background to the Client

Cycling UK is a membership charity who have championed the cause of Cycling for more than 140 years. For 125 years this was as the Cyclists Touring Club (CTC) and from 2012 as Cycling UK. They currently have around 71,000 members and 8,000 volunteers with a diverse range of stakeholders including activists, educators, employers, community groups and the wider cycling community to connect, equip and facilitate the cycling movement.

This is operationally delivered by 100 staff based across the country and from their Headquarters located in Guildford.

Their five-year strategy has a mission to enable millions of people to cycle through their Key Strategic activities:

- Organisationally we will grow and diversify our income and develop our organisation
- Grow a bigger, more diverse volunteer network
- Improve the way we engage with groups
- Expand our behaviour change programmes
- Collaborate more
- Influence a wider range of people
- Be more responsive to the needs of different places

Cycling UK's digital presence in primarily through their website, https://www.cyclinguk.org/ which is a Drupal 7 based site which is developed and updated in-house. Currently the organisation is undergoing a digital transformation which will include an upgrade to Drupal 9 on the main website. Cycling UK is also implementing a new CRM system which the site will need to integrate with, the first phase will be completed in July 2021 and includes the sales pipeline process referred to, the second phase is due to be completed in October 2021 and includes supporters and members. The Cyclists Welcome site be a subsite of the main Cycling UK site sharing content including routes, events, groups and users.

2.2 Background to the Project

EXPERIENCE Project

Cycling UK is one of fourteen partners collaborating on EXPERIENCE, a four-year tourism project across six pilot regions in England and France (Norfolk, Kent, Cornwall, Compiegne, Morlaix and Pas-De-Calais), running to June 2023. The €23.3 million project is funded by the European Regional Development Fund (ERDF, €16 million) through the Interreg France (Channel) England Programme and will deliver an innovative, sustainable and year-round tourism strategy, by developing sustainable tourism products, equipping local businesses to market themselves to generate 20 million new off-season visitors and delivering sustainable economic growth across the Channel region by June 2023.

Experiential tourism connects visitors with the essence of a place and its community. It engages people through a combination of memorable travel adventures, revealed over time, that are inherently personal, engage the senses, and make connections on an emotional, physical, spiritual or intellectual level.

Cycling UK's activities within the EXPERIENCE project are:

- Cycle Hubs in Norfolk, Kent and Cornwall – destinations combining high quality cycle routes with Cycle Friendly accommodation and hospitality businesses. Cycling UK is working with regional partners to develop routes, train businesses and develop itineraries to boost visitor numbers and increase length of stay and spend in local businesses.
- Cycle Friendly Places – a new accreditation programme for accommodation and hospitality providers, recognising excellent facilities and a warm welcome for anyone arriving by bike or cycling during their trip. Businesses will apply for accreditation, access benefits, and list themselves on the site.
- Events – showcasing the hubs, routes and businesses during the off-season to increase visitor numbers and encourage cycle tourism.

EXPERIENCE is a pilot project in which Cycle Hubs and Cycle Friendly Places will be tested, with a long-term view to scaling up across the UK and further afield in future.

Cyclists Welcome

Cyclists Welcome (https://www.cyclistswelcome.co.uk/) has existed since the Cyclists' Touring Club was formed in 1878, initially as a paper guidebook recommending businesses which welcome cyclists, and later developing into a website listing accommodation, cafes, cycle suppliers and attractions. Cyclists across the UK have contributed knowledge of businesses and routes, and Cycling UK has a history of developing and promoting routes and county guides. Cyclists Welcome currently has 1200 listers but individual listings require updating and reengaging. The site attracts an average of 5,000 page views monthly (August 2019-August 2020).

As part of the EXPERIENCE project Cycling UK are developing the Cyclists Welcome website into engaging and credible user-centred website offering pre-visit inspiration and interactive travel planning, through listing accommodations, cafes, cycle suppliers as well as information about local attractions, routes, things to do.

We are looking for a partner to additionally develop the site in two main areas for:

- Business and groups to apply for and manage accreditations and grants
- User registration via a single sign on service (not yet decided) and user profiles.

The solution is required to be user friendly and have a modern user interface. There is also a requirement to integrate with Dynamics CRM so that the application status can be tracked and user account details are synchronised.

Scope and requirements description (Full Scope in Appendix 1)

Main requirements:

- We require a Drupal experienced web agency or developer as this project involves creating the application and accreditation process alongside Cycling UK's wider digital transformation from Drupal 7 to Drupal 9. There is also a requirement to be able to integrate with our Dynamics 365 CRM via API calls or using Webhooks so a good work knowledge of API's preferably with experience with Dynamics 365 is critical.

- At least 33% of all EXPERIENCE activities must be accessible by those with sensory and mobility issues, so the site should achieve WCAG2.1AA access standards.
- The solution must be full responsive to fit within a custom bootstrap theme created by Cycling UK.
- Compliance with data collection and storage requirements.

Project scope:

To create the user registration/login utilising a SSO service, business application and accreditation management portal and the user profile/portal for business and end users within the new site that is fully integrated with our Dynamics 365 CRM.

More specifically:

- Initial enquiry form with related email confirmation and creating a Sales lead in Dynamics via API or Webhook.

- Registration process via a SSO service (we are looking for advice on this by the delivery partner) and for this information to be passed to Dynamics CRM via API or Webhook.

- Sign-up process for businesses who want to apply for the Cycle Friendly Places accreditation and be assessed by Cycling UK, including API/Webhook update of Dynamics

- Self management platform for businesses so they can track progress and provide updates on current applications.

- Access to training materials and content to accredited businesses.

- Process on completion of accreditation to update or create a public business profile (reusing relevant data already supplied) and for the business to be able to edit and update the page. (Note the public profile page build and design will be supplied).

- Renewal and re-accreditation processes.

- Engaging user profile pages for business and members of the public, with quick access to update their personal information and showing recently viewed and bookmarked pages. Additionally, for business owners to access their applications, business listings and related training materials.

- Integration of analytics to allow to review process and assess user journey and interaction with the platform for continual improvement.

The successful delivery of the new site will be measured by:

- Successful implementation of a SSO service that can later we used across Cycling UK platforms, providing a unified user experience.
- User to be able to register and updated their personal information and this to flow into the Dynamics CRM to allow tailored user journeys.
- Number of business listings and accreditations
- Number of bookings/enquiries at businesses
- Feedback from Cycle Friendly Places/standard listers

Hosting, maintenance and marketing will be covered elsewhere so should not be included.

The **maximum** budget allocated for this phase of work contained in this RFP is £40,000.

3   Project timeline

The site redevelopment should begin no later than August 1st 2021 with delivery before the end of September 30th 2021. Detailed timeline to be agreed with the successful agency. The EXPERIENCE team (Project Manager and Project Officer) will be responsible for site content until the project ends in June 2023.

4   Criteria for selection of successful company

Responses to this brief will be scored 0-4 on the following criteria:

- Drupal 9 capability
- Experience of working with API's and Webhooks
- Quality of outline, key techniques and methodologies
- Quality of project management plans
- Relevant background of delivery team
- Cost/value for money
- Governance documents
- Quality of references
- Experience working with charities
- Engagement meetings

5 How to respond to this Request for Proposal

5.1 The Request for Proposal Process and Schedule

Cycling UK is happy to answer questions and/or provide clarification to interested suppliers prior to submission of proposals, and actively encourages such dialogue.

Please contact Wynand de Jager (Digital Product Owner) wynand.de.jager@cyclinguk.org, referring to the dates provided below regarding availability for a discussion, as well as directing any other questions to them by email in the first instance.

Following an initial review of submitted proposals a shortlist of suppliers will be selected to go forward in the process.

The shortlisted suppliers will be invited to engagement meetings to meet (some or all of) the client project team. This meeting will have an open agenda and is an opportunity for you to meet the individuals involved in the process, to ask any questions you have, to verify anything you've picked up from this brief, and to ensure you know what the client is expecting to see in your subsequent presentation.

A revision of your proposal or additional documentation can be submitted prior to the final presentation.

Please note also that once Cycling UK has reviewed the proposal documents submitted and the presentations/demonstrations have taken place, it intends to select a preferred supplier.

Cycling UK aims to confirm its selection of the preferred supplier/solution and to notify them of their plans to commence the project shortly after.

The dates relating to this RFP are shown below and are pre-booked in relevant diaries, and therefore cannot be altered.

Date	Details	Relevant Notes
2nd June 2021	RFP advertised on website	
11th June 2021	Deadline for Confirmation of Interest	Send confirmation of interest by email to Wynand de Jager wynand.de.jager@cyclinguk.org
18th June 2021	Deadline for clarification questions	
25rd June 2021	Deadline for written responses (to be received electronically)	Refer to section 5.2 for details of what to submit. Please send this information by email to Wynand de Jager wynand.de.jager@cyclinguk.org

28th -2nd June 2021	Internal review and shortlisting	
5th- 9th July 2021	Engagement meetings with Project Team	45 minutes
16th July 2021	Deadline for submission of: • Governance Information • Reference Information • Revised Proposal • Additional documentation	Refer to section 6 for details of this initial response Please send this information by email to Wynand de Jager (Digital Product Owner) wynand.de.jager@cyclinguk.org.
20th July 2021	Internal review	To review written responses, references, governance info, feedback from meetings, then to prep for the presentations
21st July 2021	Final appointment	
26th July 2021	First kick off meeting	

5.2   Cycling UK Format of Response

All responses to the RFP should be made in electronic format only, no hard copies are required.

Cycling UK would like the following information from prospective suppliers:

5.3   Proposal

1. An outline of the proposed approach including a description of the key techniques and methodologies to be applied
2. A breakdown of the project deliverables and their content
3. An outline project plan with phases, review points, milestones and timescales for the project
4. Details of the delivery team, their background and where and how they will be involved
5. An overview of your initial assumptions and risks (with mitigations)
6. Full costs including:
   a. Professional Services broken down by phase and their associated costs
   b. Details of which costs are required, and which may be optional
   c. Costs for any third-party products or services
   d. Any expense and travel costs
7. Dependencies, including estimated involvement of Cycling UK staff and stakeholders
8. Validity period. State for how long the quotation is valid.

5.4   Governance and Reference information

Where the proposal is shortlisted, suppliers are required to submit governance pack and details of reference clients whom Cycling UK can contact directly, in line with the tender process schedule.

The **governance pack** must include:

1. Company profile, brief history and organisational structure
2. An up-to-date copy of your company organogram
3. A sample contract or standard terms & conditions of business
4. A sample payment schedule for a project of this nature to show whether payments are based on milestones, time periods etc., together with a clear statement of payment terms
5. The past three years of filed company accounts
6. Detail of organisation business growth: previous two years and projected two years
7. A copy of your GDPR, Data Protection and Information Security policies
8. A copy of your Equality and Diversity Policy

With respect to **reference clients**, these are of specific interest to Cycling UK and will play an important part in their decision -making. They should be organisations you have carried out similar projects for, whom you feel will reflect the approach and strengths of the proposition you can offer Cycling UK.

Cycling UK is particularly interested in references from membership and charitable organisations of similar size, scale and complexity.

Please provide at least three references:

1   At least one reference client should have completed a project within the past 3 – 6 months if possible
2   At least one reference client should have completed a project less than 18 months ago if possible

For each reference provided, please indicate what has been delivered, and why this is relevant to Cycling UK.

Two or more references will be taken up for all companies shortlisted, prior to the final presentation.

Please provide full contact details of individuals at each organisation, who can be contacted directly by Cycling UK:

-   Name, Job title, email address and the role they played in the project you delivered.

6   Appendix – Full Specification

6.1   User Registration

Cycling UK and the Experience project are looking to implement a Single Sign On (SSO) login/registration system. Cycling UK currently does not use a SSO service and will be looking for advise from the chosen partner on the best service/model to use. Once selected Cycling UK would look to the partner to implement the registration and login for the site using the selected SSO model.

6.1.1   Registration

6.1.1.1   Site Registration via a link

Users should be able to register from a link within the menu structure or via a link on the login page. The registration should require the following minimum details to register.

- First Name
- Last Name
- Email Address
- Password (the related minimum length and logic should be set by Cycling UK)

The registration form should validate to make sure the user does not have an existing account (via the email address).

The registered user should be sent an email to complete the registration using a one time link that should take the user to the user profile set up page.

6.1.1.2   Registration as part of an application process

Users should additionally be able to register as part of an application process, at the end of the application process the applicant should be sent an email to complete the

registration process. Thought needs to be given of what should happen if the user already has a registered account with the site to make it as seamless process as possible.

6.1.1.3 Dynamics Integration for registration

Once a user has completed the registration process the user should be created in Dynamics unless they already exist via Cycling UK's standard deduplication logic. The website profile should store the related Dynamics GUID against the user for future updates.

6.1.2 Login

User should be able to log into the site using as SSO service or via their email address and password. The login should be compatible with a user being able to access additional Cycling UK sites enabled for SSO.

6.2 User Profile

Cycling UK and the Experience project require user to be able to self service their profile and mailing preferences from the user profile.

6.2.1 User Profile Structure

The user profile structure should include the following field: (* = required, +=not synced with Dynamics CRM)

- Title
- First name*
- Last name*
- Email*
- Date of Birth
- Address
- Phone
- Mobile
- User profile picture+
- User statement (plain text and limited characters)+
- Multi select profile fields including
    - Types of Cycling
    - Accommodation preference
    - Dietary requirements
- Single select profile field including
    - Experience
    - Gender

6.2.2 Mailing Preference Centre

The mailing preference centre is part of Dynamics 365 Marketing and thought is required into how best to integrate this into the user profile section of Cyclist Welcome.

6.2.3   User Profile View/Edit – Current User

The current user profile should show an overview of the details held for the user and enable to user to easily edit their detail and confirm via an update button. It should also give the user access to any application processes and related resources.

6.2.4   User Profile View - Public

The public user profile view should include only the user image and statement and related publicly accessible content.

6.2.5   User Profile Synchronisation with Dynamics

Syncronisation with Dynamics should be two way:

6.2.5.1   On viewing the current user profile page

When a user logs in or views the current user page a rule should run that queries Dynamics for the latest personal details relating to the user profile fields above. If CRM profile field is different to the website profile field then the website profile field should be updated from the CRM. The user should then be shown the updated information on the profile page.

6.2.5.2   On updating the current user profile

If the user updates their profile on the website this should be reflected in the CRM, thought need to be given of what happens if the CRM is unavailable at the time of update, in this case the update should be made to the website profile and queued to update the CRM when it is next available.

6.3   Application and Accreditation Specification

Cycling UK and the Experience project required the ability for business and groups to apply for accreditation and grants. Cycling UK are developing a new Drupal 9 site and are looking for a partner to creating a fully managed application process to work on the new site.

The project has the following main elements:

1. Initial enquiry
2. Application
3. Accreditation
4. Renewal

The solution is required to be user friendly and have a modern user interface. There is also a requirement to integrate with Dynamics CRM so that the application status can be tracked.

6.3.1   Initial Enquiry

The initial enquiry would ask for minimal details and would need to log the applicants name, email, phone and appropriate subscription elements. Once complete the details would need to be passed to Dynamics to control the user journey. At this stage the user would not be required to create an online account. It is envisaged that this is a webform that then fires a rule on completion to pass the details to Dynamics.

6.3.2 Application

The applicant would be sent an email with link to the application or would apply directly from the website.

The applicant would be required to register at the start of the application process in order to be able to return to the application later. The registration should not require the applicant to confirm the registration by email before continuing to the application.

The application would be made up of:

- Application information
- Application questions
- Application qualification criteria

It is envisaged that this based on a modified webform content type to hold the application information and criteria, with the application questions via webform elements.

6.3.2.1 Application information

This would be based on standard content type elements create by Cycling UK development team and would include banner image, text and HTML element that may be stand alone or within Paragraph bundles.

6.3.2.2 Application questions

Application questions would be created via webform elements and include

- Standard Webform elements
  - Basic details about business or group making the application.
    - including Name, Address, Contact details
  - Application specific questions
    - A mixture of multi choice and free text responses
- Accreditation criteria
  - These would be fieldsets and would require the following fields.
    - "Criteria met" status with options of "Yes" and "No/Unsure". Required field.
    - "Free text" option
    - "Supporting evidence" via file upload, these would need to be save to a private files area. The user should be able to upload more then 1 supporting file. The administrator should be able to set what file formats are accepted. Required if Cycling UK checked (see below), with option to not display.
    - "Applicant Comments" which should be a plain text box. The administrator should be able to set if this is required.
    - Cycling UK Staff only
      - "Required", set if the criteria is required for qualification, tick box
      - "Criteria Description", free text with limited formatting to be shown via information icon hover (or similar)
      - "Criteria Help", free text with limited formatting to be shown once the application has been completed
      - "Criteria Help Link", link to another page or video with full help

- "Confirmation status", confirmed by Cycling UK with options of "Confirmed", "Need further evidence" this field should only be editable by Cycling UK staff
- Criteria comments log, to be able to be added to by staff or the applicant.
- Terms and declarations
  - Tick boxes and signatures
    - Option to include a signature for the application in either image upload or via an onscreen signature area controllable by the administrator

6.3.2.3   Application qualification criteria

Here the administrator would set the qualification criteria, the main elements would be:

- If the application is self-certified or it be validated by Cycling UK staff
  - For self-certified, if the criteria is met the application is automatically given.
  - For Validated by Cycling UK staff, here there will need to be additional validation by a staff member before the application is confirmed as successful
- "Qualification criteria", the administrator should be able to set how many or a percent of the optional criteria questions that need to be set to "Yes" to pass as qualified, all required criteria questions would be excluded from this calculation and be required to be "Yes"
- Comments log for staff members and applicant to be able to update and message in.

6.3.2.4   Workflow

The applicant should be able to save the application in a draft/incomplete status and be able to return to the application later. Once completed the applicant should be able to view an overview of the application (see 1.3)

6.3.3   View and update application

Once submitted the applicant should be able to view an overview of the application and be able to edit sections and see advice on areas that are not met.

6.3.3.1   Application summary view

The application summary should have the following sections

- Links to:
  - Print application, this should provide the applicant a printable or PDF version of the application that is professionally formatted (see example application report in appendix).
  - Edit submission, this should enable to applicant to go back to the original submission and to continue the application, this option should only be visible if the application is in the draft status.
- Application summary, this should show
  - Basic details
  - Number of questions answered
  - Application overall status ("Qualified", "Awaiting Confirmation", "Awaiting Further Information", "Incomplete")
- Criteria

- o Application criteria, this should show the criteria question, the met status and the confirmation status, if the application is set as requiring confirmation it should show "Awaiting confirmation" if blank, or the confirmation status ("Confirmed", "Need further evidence") if set.
  - o Application criteria further information, the applicant should be able to view additional information, this should include the Criteria Help and Criteria help link (if added), thought is needed on how best to display this, it could be via a drop down, lightbox or other mechanism, but it should ensure the user is not moved away from the summary page.
  - o Application criteria evidence, the viewer should be able to easily view the supplied evidence, initially via thumbnail and the open in lightbox for a larger view.
  - o Application criteria edit, the applicant should be able to edit the individual criteria elements "in page" and changing the "met" status or add additional evidence. The user should save to complete the update.
  - o Application criteria comments log, view comments relating to the criteria in timeline view and be able to add additional comments
- Application Terms and Declaration, the applicant should see the application terms of a link to the terms and if they have completed the declaration.
- Comments log, viewing any existing comments in timeline view and be able to add additional comments

6.3.4   Publicity page

Once a business has been accredited the system should create a publicity page if it does not already exists. The publicity page structure will be created by Cycling UK, but we would want to add the following:

6.3.4.1   Automatically create publicity page

We would want to automatically create the publicity page from the details provided in the application including name, website address and location. The system should then send an invitation email to the applicant to take ownership of the page and add additional images and description.

6.3.4.2   Image checking

We would want to investigate ways we can check automatically if images uploaded are copyrighted, indecent or show acts of violence

6.3.4.3   Cross check google locations to see if the business exist

We would like to be able to cross reference the google locations library to see if the business exists and if so cross reference to it, this should also help in stopping duplicates being created.

6.3.5   Grant Application

If an application is within a location that is flagged as a grant giving area then the applicant should be shown/sent information about the available grant. This areas needs more investigation.

6.3.6   Renew application

The applicant would be sent a renewal notice from Dynamics. To renew or redo apply the current application should be copied except any terms and declarations and then the applicant should be able to update and then redo terms and declaration. Confirmation should as per initial

application. There should also be a quick reconfirm, where the applicant can not change any details on the application but can just reconfirm terms and declaration, in this case it would automatically reconfirm.

6.3.7 Staff member administration centre

Staff member should be able to see a view of applications that can be filtered by Application Type and status, default order should be most recently updated but options for alphabetical and renewal date.

6.3.8 Examples

Example screens that have simular functionality that we are looking to recreate for our application process

6.3.8.1 Application Summary Page

6.3.8.2 Further details and edit for individual accreditation points