21 October 2019

Dear Supplier

**INVITATION TO TENDER FOR PROVISION OF SERVICES: CRM Platform Replacement: ITT REF: 459**

**1. Introduction**

1.1 You are invited by The Royal Societyto tender for the provision of services: CRM Platform Replacement.

1.2 The Royal Society is a self-governing Fellowship of many of the world’s most distinguished scientists drawn from all areas of science, engineering, and medicine. The Society’s fundamental purpose, as it has been since its foundation in 1660, is to recognise, promote, and support excellence in science and to encourage the development and use of science for the benefit of humanity.

1.3 Drawing on the expertise of our fellowship, we provide expert, independent advice to policy-makers and the general public, championing the contributions that science can make to economic prosperity, quality of life and environmental sustainability. Recent policy studies have covered topics such as ocean resources, machine learning, school-business collaboration and synthetic biology.

1.4 We also provide a forum for debate, bringing together diverse audiences to discuss the impact of science on current and emerging policy issues.

**2. The Services**

2.1 The Services specifications is summarised in the document titled “Brief ITT 459 CRM Platform Replacement” at Attachment 1. This is supported by a more detailed breakdown of requirements as set out in the Business Requirements Matrix at Attachment 3.

**3. Technical offer**

3.1 In order to respond to this ITT you must respond to the selection criteria set out in section 5.3. This should be in a document of no more than 20 pages length. In addition, you should fill out the requirements matrix at Attachment 3 setting out how your proposed solution will meet the specified requirements.

**4. Financial offer**

4.1 The Society is not bound to award the contract to the cheapest tender. We will however, use this process to establish a preferred supplier list based on suitability of responses for future year activities for the same services.

4.2 The maximum available budget for this project is £145K including VAT, to cover phase 1. This is our allocated budget for this work, but please get in touch if you have any concerns or feedback on the budget. Please note we are a registered charity.

4.3 Tenderers shall complete the **Pricing Schedule** at Attachment 5 detailing your proposed project cost (including VAT), which should include all project, equipment and travel costs.

4.4 We will also accept consortium bids.

**5. Tender selection criteria**

5.1 Proposals will be evaluated against the criteria at **Item 5.3** of this ITT, which Suppliers must respond to clearly and separately. The Selection Panel may separate criteria amongst themselves to score so please structure your proposals accordingly

5.2 Tender proposals should outline how a supplier would approach the provision of the services. The proposal should be no more than 20 pages (excluding any appendices) and use the following headings, listed below together with the selection criteria.

5.3 The selection criteria are as follows:

|  |  |  |
| --- | --- | --- |
|  | **Mandatory Criteria** | **Yes/No** |
| 1 | The implementer has a referenceable track record of delivering similar projects using the proposed software (please include an outline of similar projects you have undertaken for charities, learned academies, or similar organisations) |  |
| 2 | The proposed technology platform has the flexibility to meet current and future needs (please include a summary of the principal technology platforms that make up your proposed solution) |  |
| 3 | The implementer has the size and resources to be able to successfully implement the project and support the Society over the long term (please include a profile of your organisation including a breakdown of head count by department) |  |
| 4 | The implementer has clearly articulated an achievable implementation approach (please outline your implementation approach including: key stages, deliverables, documentation, and milestones. Please specifically detail out how you would approach any further requirements definition/design activity) |  |
| 5 | System must be live by November 2020 (please provide a high-level project plan setting out the key stages of the project and associated delivery dates) |  |
|  | **Other Key Criteria** | **Weighting** |
| 6 | Meeting of Capability Framework for Contacts and Organisation Management (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 7 | Meeting of Capability Framework for Fellowship Management (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 8 | Meeting of Capability Framework for Committee Management (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 9 | Meeting of Capability Framework for Fundraising (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 10 | Meeting of Capability Framework for Medals Grants & Awards (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 11 | Meeting of Capability Framework for Communications (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 12 | Meeting of Capability Framework for Events (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 13 | Meeting of Capability Framework for Targeting & Segmentation (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 14 | Meeting of Capability Framework for Volunteers (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 15 | Meeting of Capability Framework for Performance Reporting and Metrics (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 16 | Meeting of Capability Framework for the Technical Scope (please summarise how your solution meets the requirements set out in this section of the requirements matrix (attachment 3)) | 7% |
| 17 | Experience of the proposed team (please provide CV’s for key team members) | 6% |
| 18 | References (please provide up to four reference sites and associated contact details) | 7% |
| 19 | Ease of use (please note this will be assessed during the short-list stage) | 6% |
| 20 | Training (please include an outline of your proposed training approach in relation to this project) | 2% |
| 21 | Proposed Tenderer terms and conditions (please summarise any key terms and conditions and append a copy of your standard contract in your response) | 2% |

5.4 The following scoring regime will be used to evaluate bids:

| **Description** | **Score** |
| --- | --- |
| Very high standard with no reservations at all about acceptability | 5 |
| High standard but falls just short of 1st point above | 4 |
| Good standard | 3 |
| Generally of a good standard with some reservations | 2 |
| Basic compliance only | 1 |
| Fails to meet the minimum requirements. (Bid rejected) | 0 |

5.5 The Royal Societyis not bound to accept the lowest priced or any tender and shall not be bound to accept the supplier as sole supplier. Prices quoted shall remain firm for the duration of the contract. Value Added Tax (VAT) should be shown separately and the VAT registration number given

## **6. Timeline**

The following dates will apply to the tender and contract award process

|  |  |  |
| --- | --- | --- |
|  | **Tendering Stage** | **Dates** |
| 1 | Tender Open | Monday 21 October 2019 |
| 2 | Tender Clarification Questions | Up to 11am, Monday 18 November 2019 |
| 3 | Tenderer briefing session | 9:30AM-12:30PM Monday 4 November 2019 |
| 4 | Tender Closes | 2PM, Thursday 21 November 2019 |
| 5 | Notify Tenderers of shortlisting | By 4pm Tuesday 3 December 2019 |
| 6 | Tenderer Presentation meetings | Tuesday 10 - Wednesday 12 December 2019 |
| 7 | Contract Award | Mid-January 2020 |
| 8 | Contract Start Date | 1 February 2020 |
| 9 | Implementation of phase 1 | 1 February 2020 to December 2020 |
| 10 | Start of a potential phase 2 | January 2021 |
| 11 | Ongoing support and development | From December 2020 |

**7. Instructions to Tenders**

7.1 Suppliers are invited to:

1. Fill out the **Registration Form** at Attachment 2, and email to the Royal Society Procurement Manager
2. Provide responses to the criteria set out in 5.3, being careful to structure your responses in line with the individual questions as evaluation of tenders may be undertaken in sections of responses
3. Fill out columns E,F and G, in the Excel Business Requirements Matrix at Attachment 3
4. Complete **Pricing Schedule**, and
5. Email tenders to procurement@royalsociety.org by 2:00PM on Thursday 21 November 2019

**8. Enquiries and clarification questions**

8.1 Enquiries and clarification questions regarding this Invitation to Tender should be emailed to [procurement@royalsociety.org](mailto:procurement@royalsociety.org) and using reference “***ITT 459******CRM Platform Replacement****“* in the email subject field and be made attention of the Procurement Manager

8.2 All clarification questions will be registered, answered and shared with all Suppliers with an aim to respond within 3 business days.

8.3 Last clarification questions must be received by 11am, Monday 18 November 2019 and The Royal Society’s responses will be sent to *all registered tenderers* no later than 5pm on Tuesday 19 November 2019

8.4 Suppliers are invited to attend a briefing session about the project, including the opportunity to ask questions, at the Society’s Carlton House Terrace office at 9.30am on Monday 4 November 2019.

**9.** **Registering your participation in ITT process**

9.1 All interested suppliers must complete, sign and scan the **Tender Registration** form at Attachment 2 and email to [procurement@royalsociety.org](mailto:procurement@royalsociety.org) to receive all associated tender documentation

9.2 Correspondence about the tender, including clarification question responses, will only be sent to registered suppliers so please ensure that you complete your registration as soon as possible.

**10. Submission of Tenders**

10.1 Your tender must be received by **2:00 PM** on Thursday **21 November 2019**.

10.2It is the responsibility of all suppliers to ensure that their tender response is received no later than the appointed time. The Royal Societymay undertake not to consider tenders received after that time

**11. Attachments**

**Attachment 1** – Briefing document CRM Platform Replacement (specification)

**Attachment 2** – Tenderer Registration Form

**Attachment 3** – Business Requirements Matrix

**Attachment 4** – Tender Declaration Form

**Attachment 5** – Pricing Schedule Template

The Royal Society hopes your company decides to tender for this service and we look forward to receiving your registration form and your proposal.