



Intellectual
Property
Office

RECRUIT, DESIGN AND RUN USABILITY SESSIONS

IT-2016-106

Table of Contents

1. INTRODUCTION	3
1.1. Intellectual Property Office (IPO).....	3
1.2. Concept House	3
2. BACKGROUND TO THIS PROCUREMENT	4
2.1. Background.....	4
3. DESCRIPTION OF THE REQUIREMENT.....	5
3.1. Recruitment Of Customers To Take Part In The Usability Study	5
3.2. Design And Run The Usability Study	5
3.3. Design Of The Customer Sessions	5
3.4. Accessibility Audit	6
3.5. Report Of The Exercise And Outcomes	6
3.6. Timing	6
3.7. Information required from Suppliers	7
3.8. Bid Preparation	7
4. CHARGES.....	8
4.1. Purpose.....	8
4.2. Composition	8
4.3. Instructions.....	8
4.4. Expenses	8
4.5. Procurement Timetable.....	9
5. TERMS AND CONDITIONS	10
5.1. Contractual Approach	10
6. ACHIEVING TRANSPARENCY OF PUBLIC SECTOR PROCUREMENT	11
6.1. Requirement to Publish Contractual Information.....	11

1. INTRODUCTION

1.1. Intellectual Property Office (IPO)

1.1.1. IPO (an operating name of the Patent Office) is an Executive Agency of the department of Business, Innovation and Skills (BIS). It aims to stimulate innovation and enhance the international competitiveness of British industry and commerce. It offers customers an accessible, high quality, value for money system both nationally and internationally, for granting intellectual property rights.

1.1.2. The IPO is a highly successful organisation which, over its history, has adapted its approach and services to meet changing demands. Its core business and products deliver high quality, cost effective Intellectual Property (IP) rights to customers and its success in these core areas is tied to a much wider range of activities, such as awareness-raising and enforcement. Its customers operate within both the UK and global economies. Further information about the IPO can be found on its website at: www.ipo.gov.uk

1.1.3. The number of people currently employed by the IPO is approximately 1000. It is based at three sites: Newport, South Wales; a front office at Abbey Orchard Street, London and a file repository at Nine Mile Point, Cwmfelinfach, South Wales. It is primarily located at the following site.

1.2. Concept House

1.2.1. The headquarters of the IPO is located at Concept House, Cardiff Road, Newport, South Wales, NP10 8QQ. The office is approximately 3 km south-west of the city centre.

2. BACKGROUND TO THIS PROCUREMENT

2.1. Background

- 2.1.1. The IPO currently processes approximately 58K trade mark applications per year, with 99% of applications completed online via the Gov.uk website: <https://www.gov.uk/register-a-trademark>
- 2.1.2. The IPO customer base may be segmented at a very high level by their level of Intellectual Property knowledge into 2 discrete groups: IP Professionals and Occasional users.
- 2.1.3. The majority of applications are submitted by private applicants i.e. businesses and individuals, who account for 64% of applications (year to date 2015/16). The remaining 36% are submitted by IP Professionals primarily Trade Mark Attorneys.
- 2.1.4. IPO previously usability tested the trade mark application service in March 2016 to baseline the current online user experience and has since undertaken changes to refresh the user interface.
- 2.1.5. The IPO wishes to benchmark these findings with the current user experience of the refreshed trade mark application service to ensure no additional service issues have been introduced and any changes have delivered improvements to the customer experience.
- 2.1.6. The IPO wishes to undertake an accessibility audit of the service, with the testing aligned to WCAG 2.0 AA level.

3. DESCRIPTION OF THE REQUIREMENT

3.1. Recruitment Of Customers To Take Part In The Usability Study

- 3.1.1. The supplier will be required to recruit IPO customers to take part in the usability study.
- 3.1.2. At this stage we envisage recruitment of a maximum of 6 customers with the following sample profile:
- i. 3-4 IP professionals (e.g. 2 x trade mark attorneys and 1 formalities or administration staff) either a sole trader or working for an attorney firm;
 - ii. 1 small business/SME who has recently filed an application for a trade mark over 12 months ago independently of an agent;
 - iii. 1-2 small business owners / individuals who would be interested in applying for a Trade Mark.

3.2. Design And Run The Usability Study

- 3.2.1. The supplier will be required to design and run the usability study. As a minimum the IPO anticipates this should include:
- i. Determining whether customers can successfully complete a range of scenarios for the trade mark application form using the live service;
 - ii. Gathering feedback on design, language and usability issues found and suggestions for improvement.
- 3.2.2. Tenderers must include any other aspects of the usability study that they anticipate will be required to gain maximum value from the session.
- 3.2.3. Tenderers may also include any other issues that it feels would be appropriate for the IPO to consider in this work.

3.3. Design Of The Customer Sessions

- 3.3.1. The IPO will provide input to the design of the customer sessions in order to gather the feedback in a constructive and usable format.
- 3.3.2. The testing will be carried out on the test service and IPO will also provide a recommended list of tasks for customers to attempt.
- 3.3.3. We anticipate this will involve ■■■ days of usability testing and the tenderer is invited to recommend a suitable location.

3.3.4. The IPO anticipates that at the end of the usability session the facilitator will analyse the feedback and then, based on that, prioritise the changes that we need to make to resolves key issues that emerge.

3.3.5. The IPO would like the facilitators to share best practice with the group.

3.3.6. Up to 8 stakeholders from IPO would like to observe one of the [REDACTED] days of testing. The other [REDACTED] may be conducted unobserved.

3.4. Accessibility Audit

3.4.1. The IPO would like to conduct a separate accessibility audit following the usability in order to identify accessibility issues that do not conform with WCAG 2.0 AA level.

3.5. Report Of The Exercise And Outcomes

3.5.1. The usability report that will be produced by the successful Tenderer as a result of this exercise must be written in a way that can be used by IPO Business Managers, Product Owners and additionally that can be understood by senior IPO managers.

3.5.2. We would therefore expect the usability report to:

- i. Report on successful and unsuccessful task completion by customer type;
- ii. Explain the problems identified;
- iii. Recommend solutions to overcome the problem;
- iv. Reference any applicable standards or best practice.

3.5.3. An accessibility report will be produced by the successful tenderer containing:

- i. A summary of the key issues and level of accessibility;
- ii. Details of the accessibility issues and recommended solutions.

3.6. Timing

3.6.1. We require the usability session to be run during week commencing 9th January 2017 with an interim report being issued within 3 working days of the completion of the usability session. This is to be followed by the final report within 7 working days.

3.6.2. We would expect the accessibility report within 7 working days following the completion of the audit.

3.7. Information required from Suppliers

3.7.1. With the above information in mind Tenderers must provide the following information as part of their proposal:

- i. A proposal on how the usability study will be undertaken, with a timetable and format of the day;
- ii. Charges (see section 4 below);
- iii. CV of the proposed candidate(s) who will work with the IPO.

3.7.2. If Tenderers feel any other information will be of use to the IPO this may be included also.

3.8. Bid Preparation

3.8.1. Given the short timescales allowed for response to this ITQ and the relatively straightforward nature of the requirements, Tenderers should note that the IPO are not expecting excessively large or detailed proposals in response to this ITQ.

3.8.2. The IPO does however consider this an important piece of work and Tenderers should still aim to satisfy the requirements within this ITQ as fully as possible.

4. CHARGES

4.1. Purpose

4.1.1. The purpose of this Section is to define the information that Suppliers must supply in respect of their proposed charges.

4.2. Composition

4.2.1. Charges must be detailed for the requirement specified in Section 3 above.

4.2.2. These charges must be provided as follows:

- i. Daily rates in respect of every grade of personnel you foresee would be involved in the provision of the User Testing;
- ii. The number of days required detailed by each individual grade to complete the requirements detailed in Section 3 above;
- iii. Any other costs you foresee arising;
- iv. An overall fixed price cost for testing and reporting.

4.3. Instructions

4.3.1. Expenses, if any, should be detailed at IPO standard rates, shown in section 4.4.

4.3.2. To avoid doubt, all costs not listed within your bid will be deemed to have been waived.

4.3.3. Any improvements you propose that are additional to our stated requirements, and any additional service options being offered, must be separately costed if applicable.

4.3.4. You must confirm that all charges submitted are exclusive of VAT.

4.4. Expenses

4.4.1. Tenderers must detail what travel and accommodation expenses you would apply to a contract (if any).

4.4.2. For the avoidance of doubt, any expenses paid under the contract must only be reasonably and necessarily incurred as a result of carrying out the contracted services, with due regard to economy. They will only be paid on proof of occurrence and will be paid at the IPO's standard rates which are as follows:-

Recruit, Design and Run Usability Sessions
OFFICIAL: SENSITIVE

- i. Overnight accommodation: London – maximum £150.00 (inc. VAT) per night, B&B. Elsewhere maximum £85.00 (incl. VAT) per night B&B;
- ii. Car mileage rates at 0.45p per mile. This is for round trips of up to 150 miles. Journeys in excess of that must be undertaken by public transport;
- iii. Rail fare at standard (or advanced or off-peak) fares;
- iv. Flights at economy class;
- v. Taxi fares will only be reimbursed where public transport or use of a private car is unsuitable or inappropriate;
- vi. Parking fees / and toll charges, necessarily incurred may be claimed where supported by a valid receipt;
- vii. No other form of expenses will be payable by the IPO.

4.5. Procurement Timetable

4.5.1. The overall timetable for this procurement can be seen below:

ACTION	DATE
Issue of this Invitation to Tender	Thursday 8 th Dec 2016
Deadline for return of tender	2pm, Monday 19 th Dec 2016
Award Contract	On or before Friday 23 rd Dec 2016
Contract Commencement	w/c Monday 9 th Jan 2017

5. TERMS AND CONDITIONS

5.1. Contractual Approach

5.1.1. Any contract subsequently awarded will operate in accordance with IPO's standard terms and conditions of contract for services contained below:



BIS Standard Terms
and Conditions of Cor

6. ACHIEVING TRANSPARENCY OF PUBLIC SECTOR PROCUREMENT

6.1. Requirement to Publish Contractual Information

- 6.1.1. Government has set out the need for greater transparency across its operations to enable the public to hold public bodies and politicians to account. This includes commitments relating to public expenditure, intended to help achieve better value for money.
- 6.1.2. As part of the transparency agenda, Government has made the following commitments with regard to procurement and contracting:
- i. All new central government ICT contracts over the value of £10,000 to be published in full online from July 2010;
 - ii. All new central government tender documents for contracts over £10,000 to be published on a single website from September 2010, with this information to be made available to the public free of charge;
 - iii. New items of central government spending over £25,000 to be published online from November 2010;
 - iv. All new central government contracts to be published in full from January 2011.
- 6.1.3. Suppliers and those organisations looking to bid for public sector contracts should be aware that if they are awarded a new government contract, the resulting contract between the supplier and government will be published. In some circumstances, limited redactions will be made to some contracts before they are published in order to comply with existing law and for the protection of national security.
- 6.1.4. With the above in mind Tenderers must confirm that, except for any information which is exempt from disclosure in accordance with the provisions of the FOIA, the content of any subsequent Contract is not Confidential Information.
- 6.1.5. The IPO shall be responsible for determining in its absolute discretion whether any of the content of the Contract is exempt from disclosure in accordance with the provisions of the FOIA. Notwithstanding any other term of the Contract, the Tenderer hereby gives consent for the IPO to publish the Contract in its entirety, (but with any information which is exempt from disclosure in accordance with the provisions of the FOIA redacted) including from time to time agreed changes to the contract, to the general public.
- 6.1.6. The IPO may consult with the successful Tenderer to inform its decision regarding any exemptions but the IPO shall have the final decision in its absolute discretion.

Recruit, Design and Run Usability Sessions
OFFICIAL: SENSITIVE

- 6.1.7. The successful Tenderer shall assist and cooperate with the IPO to enable the IPO to publish this Agreement.
- 6.1.8. Tenderers must confirm their acceptance of the above or their bid may not be considered further.