



The Coal
Authority

PWA Replacement – Invitation to Tender

April 2023



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Background

The Coal Authority is an executive non-departmental public body, sponsored by the Department for Energy Security and Net Zero and our mission is to make a better future for people and the environment in mining areas.

Project Web App (PWA) or MS Project Server was installed in 2013 and is used for project and programme management and capacity planning throughout the Authority.

In the last ten years we have seen an increase in our project and programme management maturity level, and understand that our current software and ability to administer it is a limiting factor in our development. As part of our continuous improvement journey, we need a tool and the capability to manage our own configuration of it, in parallel with our process improvements, to enable us to be fit for the future.

Additionally since 2018 extended support for the system has been provided though we are aware that formal end of support for the software is in April 2023. Due to limited available options as well as to mitigate the risk of utilising unsupported software and to ensure we are fit for the future, the Authority is looking to identify a supplier that is able to achieve the following four outline scopes of requirement:

- Deployment and implementation of a new project and programme management software to replace the Authority's current Microsoft PWA software. This will either be Microsoft Project Online, Microsoft Project for the Web or a hybrid of the two
- To develop and issue a proposal for the migration of the existing data set under PWA
- To provide initial and then ongoing training and support including any system changes and development throughout the life of the contract
- To provide ongoing service management and maintenance of the replacement system

The Coal Authority Values

At The Coal Authority, our values are important to us. In this tender, our values have influenced our requirements in the following ways:

Inclusive

The Coal Authority is a Disability Confident employer, which means that we are committed to recruiting and retaining people with disabilities and health conditions. As such, we would expect any offer to meet high standards of accessibility and usability.

Progressive

As a forward thinking organisation, incorporating industry developments and best practice is key. We expect suppliers to share this mind-set when developing both technical and functional product roadmaps to ensure the tool is effective, relevant and secure.

Trusted

Environmental, economic and social sustainability is The Coal Authority's core purpose and our current [Sustainability Plan](#) details our contributions to the wider national and global effort. We are keen to work with supplier who share our ethos.

Contract Duration & Terms

The contract term will be for an initial 5 year period from the service commencement date. There will be the option to extend for an additional 2 years through 1 year extensions (5+1+1).

Tenderers are to note that the conditions of contract will be undertaken in accordance with Terms and Conditions for the Supply of Services to the Coal Authority.

Tender outline and detail:

Outlined below is the series of key documents that comprises the tender and requirements of the opportunity. In addition the following key outlines and details are provided:

- Indicative timetable
- Tender return, assessment and criteria including; Quality Scoring Assessment and Questions and Pricing Assessment
- Completion guidelines including; assessment and feedback, acceptance procedure and declaration

Key Documents:

Replacement of PWA Specification:

This document provides further detail on the outline scope of requirement provided in the "background" above.

Customer Requirements:

This document outlines the additional requirements both from a service provider and customer perspective as to how the contract will be managed throughout the life of the contract.

Information Security Requirements

Being a Government organisation, Information Security is of paramount importance to us, hence we include a detailed Information Security questionnaire as part of our due diligence process. As outlined within the questionnaire, if the requirements cannot be met by the bidder, the bid will be considered as non-compliant and will not be progressed.

Non-functional Requirements

We have defined a set of non-functional requirements to catalogue the various requirements that the application must be able to deliver. These include but are not limited to areas such as capacity, performance, scalability and accessibility of the system.

Extent to which bidders are able to meet these non-functional requirements will be assessed. Instructions on how to complete and how the document will be assessed are laid out within the “PWA Replacement – Non-Functional Requirements” document.

As outlined within the questionnaire, if the requirements cannot be met by the bidder, the bid will be considered as non-compliant and will not be progressed.

Functional Requirements:

We have defined a set of functional requirements to bring focus to our core business needs and requirements. Extent to which bidders are able to meet these functional requirements will be assessed. Instructions on how to complete and how the document will be assessed are laid out within the “PWA Replacement – Functional Requirements” document.

Service Management Requirements

As outlined within the scope of requirements and specification we require both service desk and service management support, with a dedicated account manager. This is to ensure the continued adherence to service agreements and to maintain a positive on-going relationship with The Coal Authority as outlined within the “PWA Replacement Service Management Requirements”. Instructions including assessment guidance is provided within the specified document.

Software Demonstration

Those suppliers that meet the “Information Security Questionnaire” and “PWA Replacement – Non-Functional Requirements” will be invited to provide a live demonstration.

Demonstrations are highly likely to take the form of a virtual live demonstration using screen-sharing and video if this more suitable for all participants. Suppliers will be contacted to arrange the demonstrations through the portal after submissions have been received and internal confirmation that the above criteria have been met.

Please note that the scenarios to demonstrate, usability criteria and glossary are included in the PWA Replacement Scenario Scoresheet document so that bidders are able to prepare accordingly subject to the necessary requirements being met.

Indicative Timetable –

<i>Phase</i>	<i>Process</i>	<i>Date</i>
Tender	ITT Published	16:00pm 19 th April 2023
	Deadline for Queries	16:00pm 15 th May 2023
	Tender Closing Date	16:00pm 22 nd May 2023
Evaluation	Selection Criteria / Scoring	23 rd May 2023 – 23 rd June 2023
	Demonstration	Estimated w/c 5 th June 2023
Award	Award Notification	30th June 2023
	Award	11 th July 2023
	Contract Commencement	11 th July 2023

Any changes to these timescales will be notified with the maximum possible notice.

Tender submissions received after the closing date and time will not be considered.

Failure to comply with the provisions of these Instructions or to complete the tender document in full and without alteration may also result in the disqualification of your submission.

Tender Return, Assessment & Criteria

The bid evaluation will be based on the Mandatory and Discretionary Exclusion Grounds, Technical and Financial proposals within the bids and the information set out in each compliant bid.

Bidders must accept the Coal Authority's terms & conditions.

The Coal Authority will reject any bid which is not a compliant bid.

A bid shall only be a compliant bid if the following documents have been completed and submitted via the eTendering portal:

- Information Security Requirements
- PWA Replacement Non-Functional Requirements
- PWA Replacement Functional Requirements

- PWA Replacement Service Management Requirements
- Standard Selection Questionnaire & Mandatory/Discretionary Exclusion Questions
- Quality Assessment Responses
- Deliverable Pricing

Bidders are to ensure that the registered contact details on the eTendering (InBye) portal are correct for this process. Should you have any difficulties with this procedure, please contact Joe Keir at joekeir@coal.gov.uk.

Once registered for the event, any queries and clarifications must be submitted via the messaging facility within the InBye eTendering Portal.

The tender will be awarded on the basis of the most economically advantageous tender and will be assessed based upon a **70% Quality / 30% Price** assessment

The initial evaluation of responses will be carried out based upon the Pass/Fail including Requirements Standard Selection Questionnaire & Mandatory/Discretionary Exclusion Questions. Bids meeting the project requirements in this respect will then be evaluated on the basis of the most economically advantageous tender. Your tender should be submitted on a fixed price basis and should remain open for acceptance for a period of 120 days from the closing date for the receipt of tenders.

Tenders received after the tender closing date will not be considered. Failure to comply with the provisions of these Instructions or to complete the tender document in full and without alteration may also result in the disqualification of your tender.

It is the responsibility of tenderers to ensure that submissions are accurate and as they intend. The Coal Authority will not ensure that bids are complete or correct, or allow omitted material to be submitted after the tender deadline should any errors occur.

Your submitted tender rates and prices must be exclusive of Value Added Tax.

Quality Scoring Assessment

Quality scoring will be undertaken on the basis of the approach below:

Assessment	Detail	Score
Adds Value	Response demonstrates that as well as meeting requirements in all respects, the response is comprehensive and supported by relevant evidence, which is innovative and exceeds expectations, including a full description of techniques and measurements employed that benefit and adds value for the Coal Authority.	5
Meets Requirements	Good response provided which meets the requirement and demonstrates how they will be delivered in all aspects to an acceptable standard.	4
Minor Reservations	Satisfactory response provided which demonstrates the tenderer has the ability to meet the requirement but there are some minor reservations that could have been expanded upon.	3
Significant Reservations	Response demonstrates the tenderer has the ability to partially meet the requirement, but with deficiencies apparent and generating significant concerns about the approach or solution proposed. The response falls short of minimum expectations and indicates lack of understanding of the contract requirements.	2
Requirements not met	Response fails to evidence that the tenderer understands the requirement. There are major reservations in respect of the approach, and/or the capability of delivering the requirements this could include no response to the question and/or no supporting evidence	0

The Coal Authority reserves the right to deem any submission scoring a 0 (Requirements not met) or 2 (Significant Reservations) for any scored question as non-compliant and as such may be excluded from consideration.

Full details of the assessment approach for each Quality Question are explained in further detail within the question wording and response templates.

Quality Assessment – 70%

Please respond to the ITT questions using the separate ITT Questionnaire within the procurement portal.

Offered below are the specific questions and weightings for the quality elements of this tender:

Question	Weight	Question	High Scoring Response
1. Information Security	(Pass/Fail)	<p>Please review and respond to each of the requirements in the 'Information Security Questionnaire document' (see attachments in the Portal)</p> <p>As described in the document, each response will be assessed using a RAG system. Your responses to all requirements will be considered as a collective before determining a pass or fail.</p> <p>Where a response is not an instant pass, TCA may seek clarification from bidders to ensure the requirements are understood and whether mitigating controls are in place.</p> <p>We reserve the right to exclude any submission that is determined to be a fail for this question.</p>	Suitably detailed responses with the inclusion of evidence where appropriate will increase the likelihood of a pass.

Question	Weight	Question	High Scoring Response
2. Technical non-functional requirements	(Pass/Fail)	<p>Please review and respond to each of the non-functional requirements in the 'Technical Non-Functional Requirements' (see attachments in the Portal)</p> <p>As described in the document, each response will be assessed using a RAG system. Your responses to all requirements will be considered collectively before determining a pass or fail.</p> <p>Where a response is not initially determined to represent an instant pass, TCA may seek clarification from bidders to ensure the requirements are understood and whether mitigating controls are in place.</p> <p>We reserve the right to exclude any submission that is determined to be a fail for this question.</p>	Suitably detailed responses with the inclusion of evidence where appropriate will increase the likelihood of a pass.
3. Functional Requirements	10% of available quality marks	<p>Please review and respond to each of the requirements listed in the functional requirements document (see attachments in the Portal)</p> <p>This document catalogues the functional requirements expected of any new system.</p> <p>For each requirement, please complete the 'Supplier Response' column by selecting one of the following:</p>	Suitably detailed responses with the inclusion of evidence where appropriate will increase the likelihood of a pass.

Question	Weight	Question	High Scoring Response
		<ul style="list-style-type: none"> - Not met - Partially met - Fully met <p>Please provide evidence to support your assessment in the 'Supplier Comments' column. Any response without supporting evidence will be considered as requirement not met.</p>	
4. Scenarios & System Usability	20% of available quality marks	<p>Those suppliers that meet the necessary requirements of the Technical Non-functional requirements and Information Security requirements will be invited to provide a live demonstration.</p> <p>Suppliers must not exclude any part of the scenario as listed within the "PWA Replacement Requirements Spreadsheet"</p> <ul style="list-style-type: none"> - Suppliers are expected to use the standard product/software to perform the demo and what is required for each scenario to be run effectively - Suppliers are expected to use their own appropriate test data for the demonstration - Where it is practical to do so suppliers should aim to link together results from one scenario to the next 	<p>Suitably detailed demonstration of the functionality, including any related functionality that the supplier can provide over and above that which has been specifically requested, will increase the likelihood of a high score.</p> <p>Usability along with the systems look and feel will be judged using the criteria listed in the Scenarios For Demonstration Tab.</p> <p>A high scoring response will demonstrate that all or nearly all of the criteria listed have been judged by those at the demonstrations to have been met. (See tab</p>

Question	Weight	Question	High Scoring Response
		<p>As part of the assessment the general look and feel of the system in regard to the system usability will be assessed as highlighted within the 'PWA Replacement Scenario Spreadsheet'. (see attachments in the Portal)</p> <p><u>Demo sessions will be limited to 2hrs 30mins, this includes timing for questions.</u></p>	<p>Cover Sheet & Instructions' in the PWA Replacement Scenario Scoresheet document for details of how this will be accessed).</p>
5. System Implementation	30% of available quality marks	<p>Please provide a plan, by way of a Gantt chart or similar that illustrates the timeline of your delivery of this requirement, if successful.</p> <p>Please confirm within the timeline details of the work that we as a client would be expected to complete to make for a successful implementation</p> <p>Please include details of the testing programme and any data migration that would be required if you were successful.</p> <p>Within your submission please also confirm the timing of the implementation, both start and finish dates. As well as the timescales to develop the data migration proposal.</p>	<p>A detailed and credible plan for delivery within the timescales outlined in the procurement scope with specific commitments to timescales both for the system implementation and data migration proposal will score highly</p> <p>Inclusion of details that are clear about expectations of client involvement as well as a detailed and credible testing approach will also score highly.</p> <p>It is important to us that the system is implemented by October 2023.</p>

Question	Weight	Question	High Scoring Response
<p>6. Service Management including reporting and account management</p>	<p>10% of available quality marks</p>	<p>Please review and respond to each of the requirements listed in the 'Service Management Requirements'. (see attachments in the Portal)</p> <p>Note: This document should be read in conjunction with our Service Management document ('Service Management.docx'), (see attachments in the Portal)</p> <p>For each requirement, please complete the 'Supplier Response' column by selecting one of the following:</p> <ul style="list-style-type: none"> - Not met - Partially met - Fully met <p>Please provide sufficient evidence to support your assessment in the 'Supplier Comments' column. Any response without sufficient supporting evidence will be considered as requirement not met.</p> <p>Please also include your proposed Customer service plan as part of your response. This is to support the 'Service Management.docx', but it will not be scored itself.</p> <p><u>Maximum 2 sides of A4</u></p>	<p>A high scoring response will demonstrate a high degree of compliance to the requirements. (See tab: 'Cover Sheet & Instructions' in the requirements document for details of how responses will be scored).</p> <p>A detailed and credible customer service plan in support of your completion of the 'Service Management Requirements' which gives us confidence as well as a suitably experienced team that will be supporting this contract would be welcomed.</p>

Question	Weight	Question	High Scoring Response
7. Training and Support	20% of available quality marks	<p>Please outline what training and support will be offered and in line with the specification throughout the life of the contract.</p> <p>This should include but not limited to the number of days/hours provided each year and what the training delivery medium is.</p> <p>Please also outline the timescales to develop the training plan and how this will be delivered.</p> <p><u>Maximum 3 sides of A4.</u></p>	<p>A high scoring response will include detailed plans as to how training and support that reflect the needs of different roles will be provided, alongside accessible medium, e.g. guides and videos, throughout the life of the contract.</p> <p>The response will include clear timescales as to how the plan will be developed and then delivered.</p> <p>Your response should be limited to, and focused on, each of the component parts of the question posed. You must not make generalised statements or give irrelevant information.</p>
8. Social Value	5% of available quality marks	<p>Using a maximum of <u>2 sides of A4</u> please demonstrate how you currently and will support health and wellbeing, including physical and mental health, in the contract workforce that will be utilised in the delivery of service.</p> <p>Your answer must include a method statement, this should describe the commitments of your organisation for the above and how you will achieve this using the award criteria set out</p>	<p>A high scoring response will be one that tells us what existing and/or planned commitments, and plans the bidder has which:</p> <ul style="list-style-type: none"> • Identify an understanding of issues relating to health and wellbeing, including

Question	Weight	Question	High Scoring Response
		<p>below. This should include how you will implement your commitments and how these will be monitored, measured and reported upon and the impacts these have had.</p> <p>We are also keen to know might work with the Coal Authority, through the delivery of this contract, to support our continuous efforts to improve the health and wellbeing of Coal Authority Staff.</p> <p>Award criteria: You should include but is are not limited to detailing an:</p> <ul style="list-style-type: none"> • timed action plan • use of metrics • tools/processes used to gather data • reporting • feedback and implementation <p><u>Maximum 2 sides of A4.</u></p>	<p>physical and mental health, in the contract workforce.</p> <ul style="list-style-type: none"> • Showcase inclusive and accessible recruitment practices, development practices and retention focussed activities including recruiting, managing and developing people with a disability or health condition. • Actions taken to invest in the physical and mental health and wellbeing of the contract workforce. • Methods to measure staff engagement over time and adapt to any changes in the results. • Processes for acting on issues identified. <p>Your response should be limited to, and focused on, each of the component parts of the question posed. You must not make generalised statements or give irrelevant information.</p>
9. Sustainability	5% of available quality marks	Using a maximum of 2 sides of A4 describe in a method statement the effective measures you have and/or will develop:	A high scoring response will be one that ensures that all areas outlined within the

Question	Weight	Question	High Scoring Response
		<ul style="list-style-type: none"> • To ensure that environmental and social impacts are continually reducing over the lifecycle of the Contract • To deliver additional environmental benefits including working towards net zero greenhouse gas emissions • To influence staff, suppliers, customers and communities through the delivery of the Contract to support environmental and social awareness, protection and improvement <p>This shall be in consideration and include but is not limited to how you will meet the sustainability requirements as laid out under the “specification” including sustainable data management. Maximum 2 sides of A4.</p>	<p>question are met, are well-structured, clear and demonstrate an understanding of the requirement.</p> <p>This includes but is not limited to detailing the relevant measures that are in place and what the frequency and how these are reviewed and measured. If the measures are to be developed, in addition to the above it would be welcomed to have the indicative timeline as to when these measures would be in place.</p> <p>Your response should be limited to, and focused on, each of the component parts of the question posed. You must not make generalised statements or give irrelevant information.</p>
10. Previous Experience	Information Only.	Provide evidence of two previous projects that you have delivered which are relevant and / or similar to the scope of this contract.	Not applicable.

Question	Weight	Question	High Scoring Response
		<p>Please include detailed information on the scope of these previous projects, the extent and detail of the works involved, client and value.</p> <p>Please also provide details of two client references for who you have delivered relevant projects (info only) These references will not be contacted without prior agreement, upon consideration for award as part of our due diligence process.)</p> <p><u>Maximum 4 sides of A4</u></p>	

Pricing Assessment (30%) – Details

Pricing will be assessed using the least cost differential method, for the initial five year contract period.

Pricing will be fixed for the first two years before annual indexations being available based on CPI (Consumer Price Index) for the remaining contract years.

Your submitted pricing must be inclusive of all requirements outlined within the tender documentation.

Your pricing should be submitted on the pricing template provided within the eTender portal.

You may provide details of your standard pricing structure for a service of this type in addition to your compliant pricing submission.

Completion Guidelines

The questionnaire within the Inbye Portal should be completed by a partner/director/senior manager.

Please answer each question fully. The Authority stresses the value and importance of substantiating answers with supporting documentation when requested.

The questionnaire should be completed accurately; if successful this document will form part of the contract.

The response and supporting documents must relate specifically to the organisation's policy and arrangements.

Assessment & Feedback

The tender submissions will be assessed in accordance with the assessment criteria outlined.

The Coal Authority will recognise the required standstill period when notifying all bidders of the outcome of the process.

Feedback will be provided at that time to organisations which are not successful through the issue of a letter providing debrief information on the assessment of the tender, scoring and confirmation of the successful tenderer.

Acceptance Procedure

The Authority does not bind itself to invite you to tender for the project and will not be responsible for, nor pay for, any expenses or losses which may be incurred by you in the preparation of your tender.

It is intended that the procurement process will take place in accordance with the provisions of this ITT, but the Coal Authority reserves the right to terminate, suspend, amend or vary this procurement process by notice to all potential bidders in writing.

The Coal Authority will have no liability for any losses, costs or expenses caused to bidders as a result of such termination, suspension, amendment or variation.

No tender shall be deemed to have been accepted unless such acceptance has been notified in writing to the tenderer.

Whether or not your tender is accepted, you must treat the details of all tender documents as private and confidential. If you decide not to submit a tender, you must reply stating you do not wish to respond to the tender and provide a comment why.

If you require any clarification on the details within this document, associated attachments or the tender process, a query should be submitted through the online messaging facility within the InBye eTendering portal.

Declaration

We declare that this is a bona fide tender, intended to be competitive, and that we have not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person.

We also declare that we have not done, and we undertake that we will not do, at any time before the returnable date for this tender any of the following acts:-

- (a) Communicate to a person other than the person calling for these tenders the amount or approximate amount of the proposed tender;
- (b) Enter into any agreement or arrangement with any other person that he/she shall refrain from tendering or as to the amount of any tender to be submitted;
- (c) Offer, pay or give or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the said work any act or thing of the sort described above.

In this declaration the word 'person' includes any persons and anybody or association, corporate or unincorporated; and 'any agreement or arrangement' includes any such transaction, formal or informal, and whether legally binding or not.