PlanX – User Research and Content Design Project Brief

Lambeth Council are procuring the services of up to two User Researchers (UR) and one Content Designer (CD) with expertise in testing/research/analysis to work on the PlanX digital project. PlanX is one of the lead projects of MHCLG’s Open Digital Planning initiative, further details of which are available from here - [PlanX](https://www.google.com/url?q=https://opensystemslab.notion.site/Plan-Resources-6b896f88be4c4b4c8ec8474a34c70d7c?pvs%3D4&sa=D&source=docs&ust=1740051167274452&usg=AOvVaw0zry8ZVgSwALDSFoiBxt29).

The successful supplier will lead the User Research function of the PlanX project and work with the project software developers Open Systems Lab (OSL) on content design.

Knowledge of town planning and the planning application process, experience of working on digital improvements and experience of agile working would be beneficial. Collaborative working skills is essential.

The successful supplier will work closely with both the team at Lambeth Council, our 20 Council partners and OSL, and engage with the other major stakeholders who form part of the overall project.

A “work plan” will need to be developed and agreed with Lambeth and OSL as part of the initial engagement at a “kick off” (or similar) session; there will need to be an ability to work flexibly so that the workflow matches the development ups and downs of the development of the PlanX product. The successful supplier will need to attend the team’s fortnightly sprints.

The UR(s) will need to work to an agreed (flexible) plan alongside Lambeth and OSL so that their input is managed in an effective way to gain the best insights and analysis from testing and workshops. The successful supplier will be expected to deliver a User Research Report, with findings and recommendations, after each round of user testing.

The CD will be expected to be available flexibly throughout the duration of the project allowing for peaks and lulls in the workflow. The CD will be expected to report regularly on work completed and changes/recommendations made to PlanX.

Deliverables/outcomes of the project

* Fortnightly reporting meetings and updates to Lambeth council on progress of stake holder and user testing, keeping Lambeth fully up to speed with all relevant communications with other parties involved in the project.
* Work in an Agile way; plan and agree as part of the fortnightly sprints a programme of input that will allow effective use of time allocated throughout the duration of the segment employed to run testing/analysis etc and input into the final report.
* Attend and input into fortnightly project meetings as required and Show and Tell meetings throughout
* Attend and input into workshop collaborations at the fortnight meetings as required (these are not part of the Show and Tell).
* Input, draft and produce (final segment only) the Beta output for the User Research report, the format and content are to be agreed with Lambeth Council and partners.
* Run stakeholder sessions to seek out key goals for the Beta phase.
* Find participants for user research sessions. Note: if you will use an external company to find participants, please provide cost estimates as part of your bid.
* Working with OSL to set up and manage a group of “critical friends” that can be asked for input on product and services at pace.
* Run User Testing sessions to test the prototype as the project progresses.
* Reviewing and analysing testing results from each iteration throughout the Beta phase.
* Provide regular user feedback to OSL so these can be incorporated into their design developments and discussions.
* Engage with other councils and encourage users from across the country to participate to avoid the information/results being too London-centric.
* Contribute to material for working in the open such as blogs in conjunction with Lambeth Council and partners to raise awareness of PlanX and the wider digital programmes nationally.

Guidance notes

The successful supplier will be expected to demonstrate the following skills and experience:

* Experience of leading user research and creating the testing/analysis environment and conducting interviews and obtaining relevant consents
* Past experience where you had lead testing for a similar (beta) stage of project
* Experience of setting up and carrying out moderated usability testing
* Knowledge of how to best engage with users and stakeholders as well as how you would go about testing for user/stakeholder feedback
* A recognised expertise in user research/testing methodologies
* Excellent communication skills
* Experience of involving a team in user research and helping them develop a deep understanding of their users
* Expertise in reviewing and analysing the results
* Ability to present clear findings in writing and report format so that they are easily understood
* Experience of undertaking research/testing with a broad range of users, including those with limited digital access and confidence and people with a range of visual, hearing, motor and cognitive impairments.
* Modelling insights gained from user research into formats - such as personas, user journey maps - and providing final project reporting

Tender Evaluation

The Council would like potential suppliers to:

1. Provide responses to the questions listed under the heading Evaluation Criteria, and
2. Provide daily rates for roles specified under the heading Price Evaluation.

Evaluation Criteria (50% weighting)

Note: all questions and responses will be weighted as indicated in the table and should be no greater than 250 words per question unless specified otherwise.

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| **QUALITY – Weight 40%** |
| **Item** | **Evaluation Criteria** | **Sub- weighting %** |
| 1 | We are developing software to help people understand and use the English town planning system. How will you gain an understanding of the subject matter to amplify the effectiveness of your user research and content design services? | 5 |
| 2 | How will you approach the project to ensure a collaborative approach between all partners? Provide examples of times you have worked in a multi-disciplinary multi-partner team. How have you collaborated with service teams, project owners, subject matter experts and other stakeholders? | 5 |
| 3 | Please detail how this contract will be resourced (to ensure workloads are effectively managed and the required expertise is provided), including how you will ensure consistent staffing over the entire contract period. This should include a brief list (**no more than 1 page of A4**) of the professionals for this contract with a short sentence on the technical expertise & experience of the professionals who will be assigned to this project. | 5 |
| **(Questions 4-6 are UR related only)**4  | UR only: What is your approach to sharing insights with stakeholders? You will be working with multiple partners and a software development company. How will you ensure your findings and recommendations are communicated effectively and boldly to the wider project group and incorporated into decision making processes?  | 5 |
| 5  | UR only: Describe your UX research process and what methods you follow and tools you use. | 5 |
| 6 | UR only: How do you approach analysing and drawing conclusions from a large amount of data? | 5 |
| 7 | UR only: When do you choose qualitative, quantitative, or mixed research methods? How do you know you’re asking the right questions and how do you account for bias? | 5 |
| **(Questions 8-11 are CD related only)**8 | CD only: How do you engage stakeholders and subject matter experts in the content design process? What approaches do you take when a subject matter expert is unhappy about their content being changed | 5 |
| 9 | CD only: How do you approach designing inclusive content? What are some important considerations for inclusive design? | 5 |
| 10 | CD only: How would you approach introducing content quality standards across a large site?What processes and methods can support content quality?How would you make it easier for remote, devolved editing teams to adopt content quality standards? | 2.5 |
| 11 | CD only: How have you shown the value of content in a previous role? What measurements and indicators have you used to show uplift in user satisfaction with content? | 2.5 |
| **Total Quality** | **Total sub-weight criteria to total**  | **50%** |
| **SOCIAL VALUE – Weight 10%** |
| **Item** | **Evaluation Criteria** | **Sub- weighting %** |
| 1 | Experience of developing content inclusivity – understanding what important considerations exist for inclusive design. Demonstration of approach to engaging with a diverse group of stakeholders, and establishing appropriate mechanisms for testing and feedback   | 2.5 |
| 2 | Experience working in a blended team with people from other partner organisations and awareness of digital innovation in a Local Authority context.  | 2.5 |
| 3 | Please detail your sustainability credentials, including net zero targets and emissions reduction plans.  | 5 |
| **Total SV** | **Total sub-weight criteria to total**  | **10%** |

Price Evaluation

Please provide daily costs for each specialist assuming the following number of days will be billed each week:

* Lead user researcher – 4 days per week (192 days per year)
* Second user researcher – 2 days per week (96 days per year)
* Content designer – 3 days per week (144 days per year)

Up to 12 participants will be needed each month for user testing. The successful bidder will be expected to find and recruit these participants. If you will use an external company to find participants (i.e. if recruitment costs are in addition to the daily rates above), please provide cost estimates as part of your bid.

Please specify any other costs likely to be charged.

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| The following price evaluation model will be used.  |
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Project Start and End:

This contract will cover the entire 2025/26 financial year.