DIGITAL SERVICES RM1043ii CUSTOMER REQUIREMENTS
DS02-012 Innovation Funding Service

CONTENTS

WHATS INCLUDED

Customer Requirements (this document)
Appendix A — Award Questionnaire (template to be completed)
Appendix B — Supplier Pricing Matrix (template to be completed)
Appendix C — Call-Off Contract (Part A&B) (Customer specific terms)
— Call-Off Contract (Part C) (Standard Terms and Conditions)
Appendix D - Supplier Capability List for Partnering Possibilities
Appendix E - Beta planning requirements Sept15

Any supplier invited to tender who has NOT returned their signed framework agreement for RM1043ii Digital Services 2 will NOT pass compliance check post-bid for this project and therefore their response will NOT be evaluated. Should any supplier have any questions regarding their status, please contact CCS via the eSourcing suite.

OVERVIEW

CCS Project Lead:	Amy Retallack
Customer:	Innovate UK
Delivery Location:	North Star House, North Star Avenue, Swindon SN2 1UE
Phase(s):	Beta
Project:	DS02- 012
Required Capabilities:	Include, but are not limited to: (mark those that apply) ☒ Software engineering and Ongoing Support ☒ Agile Product Design & Delivery ☒ User Research (UX Design)
Subcontracting Permitted?	Yes
Supplier Partnering Permitted?	Yes
Contract Charging Mechanism (Beta Phase):	Hybrid
Tender Publish Date:	18/09/2015
Tender Submission Deadline:	12/10/2015
Proposed length of phase:	8 months
Proposed Commencement Date of Project:	26/10/2015

LOTTING STRUCTURE

The Customer has structured this procurement as follows:

Lot 1	Software Engineering and Ongoing Support Agile Product Design and Delivery
Lot 2	User Research

TIMESCALES

The Customer or CCS may change this timetable at any time. The Potential Provider will be informed by email if there are any changes to this timetable.

It is the Potential Provider's responsibility to monitor the online messaging facility (e-Sourcing).

TIMESCALES		
DATE	**WHO**	**ACTIVITY**
18/09/2015	CCS	**Publish requirements to Potential Providers:** Clarification period starts
25/09/2015	CCS, Customer & Potential Providers	**Clarification Webinar 14:00:** Invite to webinar will be issued via the CCS eSourcing Suite. All questions and responses will be published via eSourcing Suite.
30/09/2015	Potential Providers	**Clarification Question period closes** Please submit all clarification questions by 23:59hrs Please note that we aim to publish all response to Q&A within 24hrs
12/10/2015	Potential Providers	**Submission Deadline** Potential Provider must upload submission to the eSourcing suite by 12:00noon
21/10/2015	Potential Providers & Customer	**Presentation** Details within Appendix A Award Questionnaire - AQB8
22/10/2015	CCS	**Award Notification** Publish Successful and un-successful Potential Providers.
26/10/2015		**Expected "Commencement Date" for Call-Off Contract/s**

KEY DELIVERY DATES (TBC, based on an Alpha assessment date of 8th October 2015)

PROJECT PHASES	START DATE	COMPLETION DATE
Beta	26/10/2015	30/06/2016
Beta – application and assessment	26/10/2015	26/02/2016
Beta – due diligence	26/10/2015	10/06/2016

CURRENT SITUATION / BACKGROUND INFORMATION

We are seeking a supplier to deliver the technical expertise for a Beta phase of our Innovation Funding Service, a user-centred accessible digital service.

Following a successful Discovery and Alpha phase and working within Governments Digital by Default Service Standard, we are looking to establish a technical team who will take the Alpha 'thin slice' version of our Innovation Funding Service and help work with us through a Beta phase with the aim of putting the service online by February 2016. Alpha code has been developed as 'Beta ready product' and so we will expect to re-use these built components within our Beta product.

We would expect the team to consist of (but are not restricted to) a UX researcher, Front-End Developer/s, Back-End Developer/s, Business Analyst and Tester with the potential for an architectural and environments team member/s. This procurement has been divided into two separate lots and so if a bid is received to Lot 2 only (User Research), the supplier should indicate how they would interact and work with Suppliers from Lot 1 (Software Engineering and Ongoing Support AND Agile Product Design and Delivery). As the time-line for a Beta product is aggressive, we would envisage suppliers suggesting the running of parallel working teams however Innovate UK does not want to be prescriptive about how a supplier should set the team up in order to meet this ultimate goal. It is expected that members of the Innovate UK team will work as part of the delivery team with the ultimate aim of moving the expertise in-house. With this in mind, knowledge transfer is an essential part of the supplier remit. Co-location within the Innovate UK offices is also essential.

Longer-term, the Innovation Funding Service is intended to support the digitisation of all other types of funding that Innovate UK offer.

Innovate UK is the new name for the Technology Strategy Board – we're the UK's innovation agency, accelerating economic growth.

Innovators whether small, medium or large, see the world as full of problems - they have the ideas and talents to fix society's challenges. We know that taking a new idea to market is a challenge. We fund, support and connect innovative businesses through a unique mix of people and programmes to accelerate sustainable economic growth.

As Innovate UK has grown in strength and maturity, we have developed a range of highly effective tools, products and services to support business and accelerate innovation. However, a significant number are still dependent upon legacy systems with outdated and awkward functions and operation, or via a combination of applications, e.g. MS Word, MS Excel and MS Access. This situation impacts our ability to scale -up our operations efficiently.

In response, Innovate UK has launched the Innovation Funding Service work-stream with the aim of moving all of our end-to-end transaction services on-line. We aim to operate a "Digital by Default" business model designed to meet the government Digital by Default Service Standards, leveraging the benefits of cloud computing, in line with the Government's digital strategy.

The first end-to-end service to be migrated under this work-stream relates to the application process for Collaborative Research and Development (CR&D) funding projects. It forms a large part of Innovate UK's grant funding and is currently not on-line. This represents operational inefficiencies and a poor customer experience.

Business Scenario

Collaborative research and development (R&D) encourages businesses and researchers to work together on innovative projects in strategically important areas of science, engineering and technology – from which successful new products, processes and services can emerge, contributing to business and economic growth. Each £1 we invest in collaborative R&D typically returns around £7 in GVA (Gross Value Added).

By co-funding projects involving partnerships between businesses and between business and academia, collaborative R&D reduces financial and technical risk and encourages knowledge exchange, supply chain development and parallel working on complex challenges.

We hold frequent competitions for collaborative R&D project funding, in a wide range of areas covering specific technical or societal challenges.

Business Process 'As Is'

The current business process is represented in the following diagram:
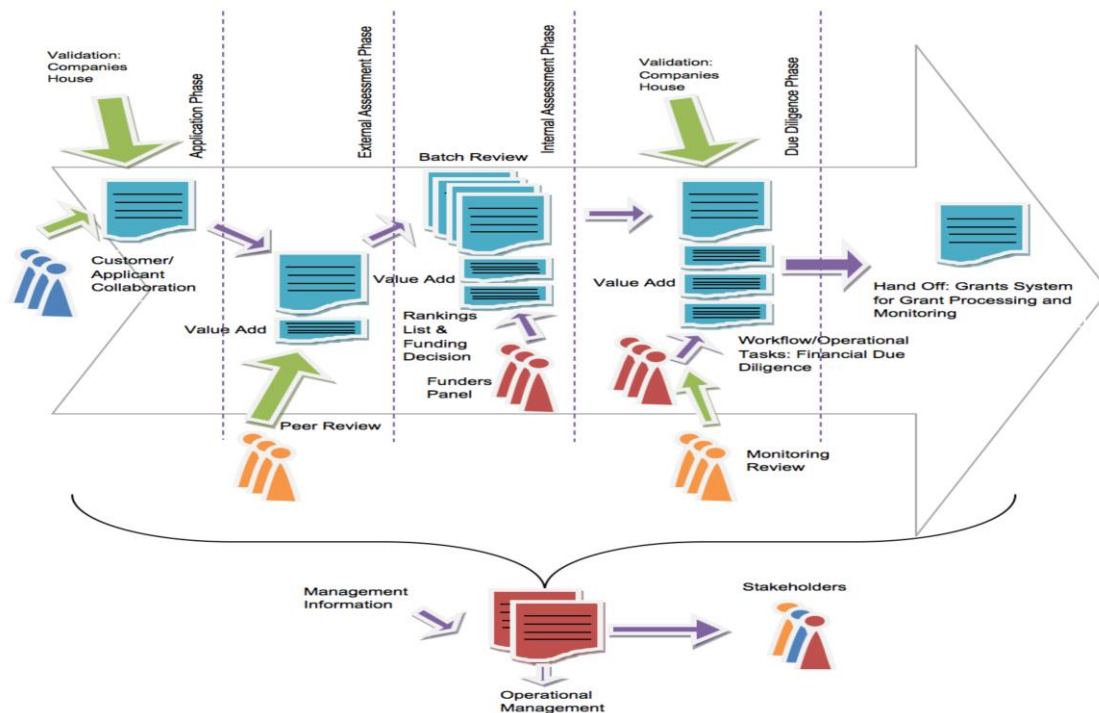
This is described in more detail below:

Application Phase

1. The lead or single applicant registers for a Competition in order to receive a username, password and a unique application ID and form.

2. Once registered for the Competition, they receive an email containing an application form, a username, password and a secure URL.

3. They upload their completed documentation to our upload secure site.

External Assessment Phase

1. Once the Competition submission deadline is reached, all applications submitted to the competition are sent for assessment. Applications are assessed independently by experts taken from both business and academia (known as Assessors).

2. Each application is assessed by up to five Assessors and against the same set of gateway and criteria questions.

3. Each Assessor is required to complete and submit a score-sheet with comments for each application they are assigned to assess. If the Assessor has a conflict of interest they must notify our Competitions Team who will reallocate the application to another Assessor.

4. A report is compiled to identify ranked order of all applications. Within this ranked list are all the Assessor comments and score given to each question.

5. Where there is a second stage to the Competition, successful applications are invited to the second stage of the Competition in strict order from the top of the ranked list as recommended by the Assessors.

6. At the final stage of a Competition an assessment panel is convened to discuss any applications that require clarification around scope, quality, feasibility or fundability. The assessment panel recommends a ranked list of applications to be funded by Innovate UK.

Internal Assessment Phase

1. The final recommended panel list is presented to the Funders Panel of Innovate UK to obtain final approval for funding.

2. Once all applications have been assessed and checked for completeness, the applicant or the lead applicant will be informed of the decision by email.

3. Feedback from assessors who reviewed the application is collated. The applicant or the lead applicant can access the feedback from the assessors who reviewed the application by logging on to the secure website where they uploaded their application documents.

Due Diligence Phase

1. The applicant or the lead applicant is sent a Conditional Grant Offer Letter following the email notification. They are asked to accept and return all required documentation within the stated timeframes.

The following are examples of documents that may be requested in the Conditional Offer Letter:
- Collaboration Agreement, for collaborative projects, duly signed by all participants.
- An initial Financial Forecast for each project participant / consortium member showing the anticipated spend split quarterly throughout the life of the project.
- A letter on company headed paper confirming BACS details for payment purposes.
- A detailed Project Plan splitting the original project proposal into individual work packages.
- A Milestone and Risk Register for the whole project showing key milestones with an allocation of the project costs assigned to each milestone, the key risks and how these will be managed during the project.
- An Exploitation Plan for your project, containing further information where possible from that provided in the original application, setting out how the project team will exploit the results of the project.

2. After the Conditional Offer Letter has been sent, Innovate UK will undertake costs review and financial checks on each of the project participants:

- The cost review is to ensure that the project costs comply with the rules for the Competition and the State Aid requirements. A member of the finance team may contact applicants for further information on the detail in the finance forms; the project will not be able to start until this review has been completed satisfactorily.
- The financial viability checks are based on the latest accounts filed at Companies House, but we may ask for additional financial information if a participant has not filed accounts recently. If an organisation fails one or more of the financial viability test criteria, or if specific funding ratios cannot be ascertained because of limited information or abbreviated accounts, or if they are not required to file accounts with Companies House, then additional information may be requested directly from them.
- Once all checks are completed and passed, and all the required documentation received, Innovate UK will issue a Grant Confirmation Letter detailing the contract between Innovate UK and the recipient organisation(s). This must be signed and returned to us before the grant for the project can be claimed.

3. They are required to attend a new project workshop and if they are in a consortium one representative from each partner will need to attend with them. This workshop is compulsory before the project starts as it provides them with an opportunity to:

- Find out about the project start-up process.

- Understand our expectations of you once the project is underway.
- Meet their project assigned Monitoring Officer who will attend project meetings as well as report progress and issues to Innovate UK. Like Assessors above, Monitoring Officers are not employees of Innovate UK. Monitoring Officers also assist in the 'start up' phase of a project, helping them with all key documentation and ensuring the project starts off smoothly.

Hand Off: Grants System for Grant Processing & Monitoring

- Participants can only claim for eligible costs incurred AND paid between the project start and end dates. Any costs incurred or paid outside the project dates are ineligible.
- Depending on the size of grant awarded, claims will be subject to an independent audit to confirm that the costs claimed are in line with the terms and conditions of the offer. The audit requirement will be stated in the Conditional Offer Letter.
- All grants are claimable quarterly in arrears (unless otherwise stated in the grant confirmation letter) and will only be paid once the necessary reporting and audits have been completed. Claims are paid directly to each participant. It is important that you plan your cash flow requirements to ensure you can accommodate the funding required for the project.

Web flow 'As Is'
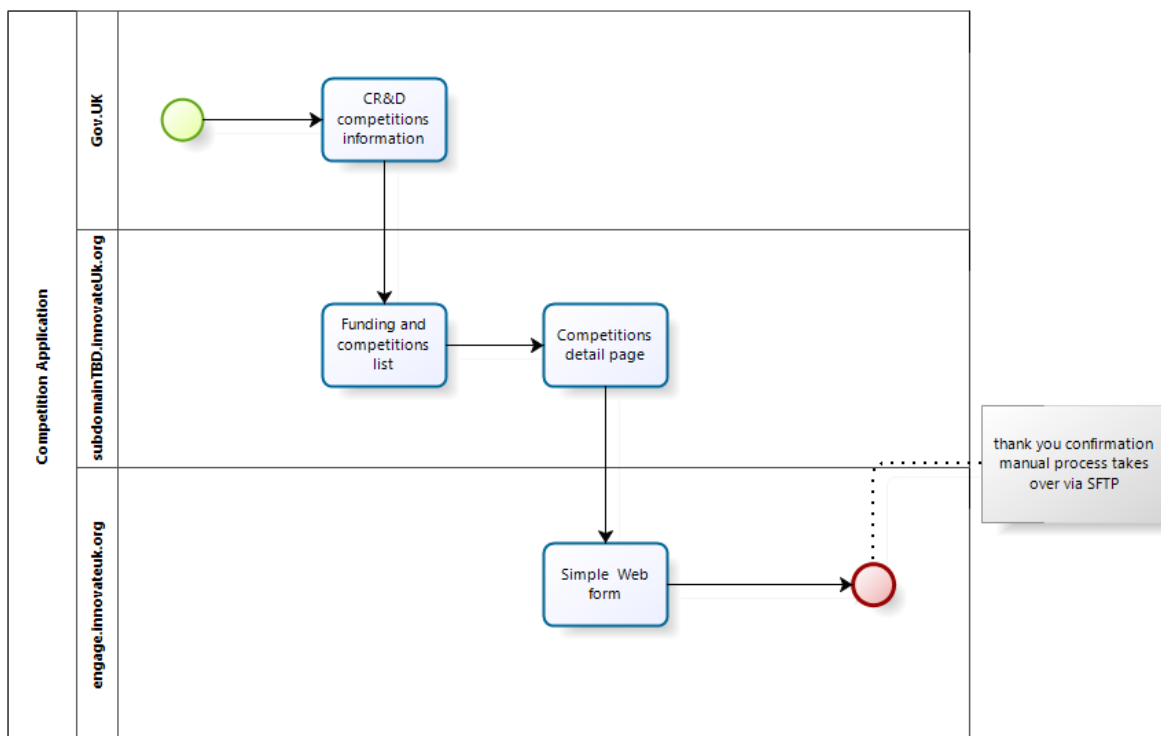
Technology 'As Is'

The existing business process is run via a combination of applications:
- Secure FTP
- MS Word
- MS Excel
- MS Access

- Email

There is some limited automation to migrate/import data between MS Access and Excel.
We aim to migrate our existing disconnected process into one, integrated web-application.

PROJECT SCOPE

The scope of the overall project is to create a digital service for the application process from the point of initiation of the application to the transfer of information into the grant system to enable grant claiming. We need to consider the wider business context when designing this service however, as it must co-exist with other Innovate UK services to enable a seamless user journey across all our services.
A Discovery and Alpha phase of this project have been successfully completed where a 'thin slice' of the technology and user experience has been proven to work with the technologies selected. It is now the role of the Beta phase to complete the backlog tasks associated with Alpha and complete the entire user experience.
The scope of this specific engagement covers the Beta phase of our Innovation Funding Service Project.

Please see Appendix E – Beta planning requirements Sept15 for full information.

CURRENT ROLES AND RESPONSIBILITIES OF THE CUSTOMER

Role	Responsibilities
Service Manager – ▮	Overall responsibility for the project.
	To interpret user insight and performance data to drive service design and iterative operational improvements for digital and assisted digital service channels. Will engage with the supplier's technical staff to define the best system and platform configurations to achieve business/user objectives.
Delivery Manager – ▮	To run the project on a day to day basis. Will manage the customer side of the engagement and the interfaces with the supplier on a day to day basis. This includes ensuring user input and existing collateral are available to the supplier as per the agreed schedule.
Technical Architect – ▮	Provide hands-on technical leadership, in the development, operation and ongoing improvement of complex, transformational digital services serving millions of users.
Development Manager - ▮	To provide assurance of the low level technical design.
Test Manager - ▮	To provide assurance of the testing process and transition to UAT.
Business Analyst – ▮	To support the project by analysing propositions and defining and mapping requirements. Will validate and maintain requirements internally.
Business Improvement Specialist – ▮	To ensure any new processes developed are fully aligned to the meet all business requirements. Will lead on any business process re-engineering required to implement the new service and on the implementation of change management within the business.

CURRENT TECHNOLOGIES AND LANGUAGES

Through our Alpha phase, a portion of our service has already been designed. This has been developed with re-usable code to allow us to test the target architecture and high level requirements listed above.

HTML5/CSS/Javascript has been selected for the frontend supported by the Spring framework and a MYSQL database at the backend using stateless REST interfaces throughout the technology stack. Please see 'High Level Requirements' for full information.

REQUIRED OUTCOMES

To establish a technical team who will take the Alpha 'thin slice' version of our Innovation Funding Service and help work with us through a Beta phase with the aim of putting the service online by February 2016.

Beta

The purpose of Beta is to:
- Complete the backlog tasks from the Alpha phase with the aim of achieving an online service that can be launched as a private Beta from January 2016.
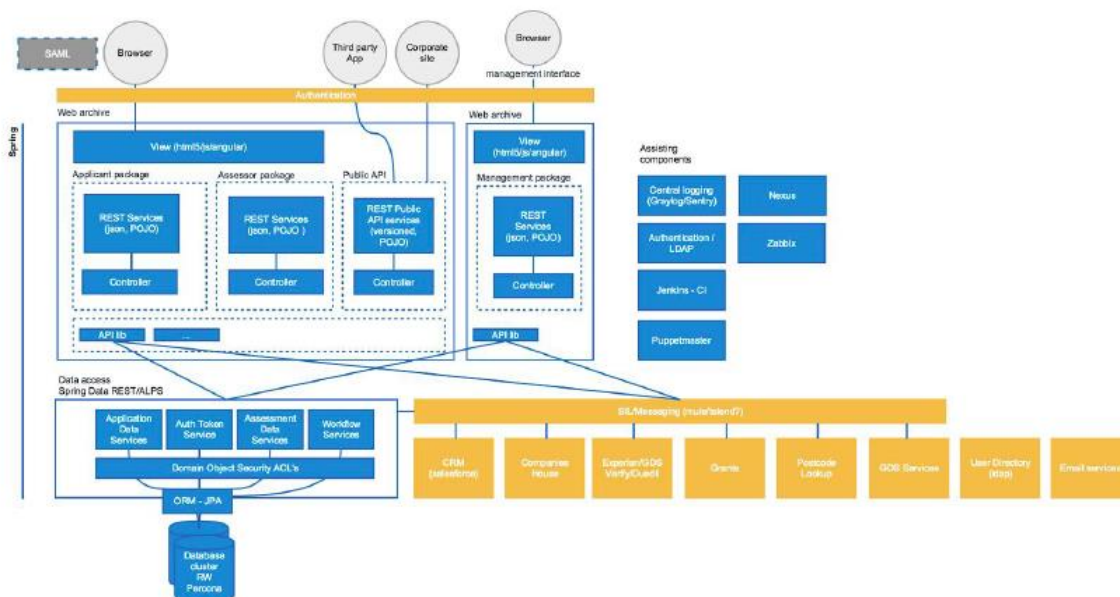- Establish the basis for measuring the success of the new service

HIGH LEVEL REQUIREMENTS

We have some high level business and technical requirements as inputs to the Discovery phase. These are outlined below:

Target Architecture

The following information explains the higher level design we are looking to achieve:

Development View, Module level

Key elements in the development view
- The top layer of the application will be deployed in one archive, containing multiple packages.

- The management interface will be developed as part of the same system, but will be prepared for deployment separately from the other services.

- We will package controllers and rest services in a logical way together. Some shared libraries will be packaged separately so they can be used by all other packages. An example of this is the API library which is used to contact the data access and SIL services.

The controllers will receive a user interface call like 'getApplicationStatusOverview(…)' and will pass this on to multiple calls to the backend to retrieve the needed data. The data will be combined to then include competition deadlines and application progress into one set of data that is returned to the client.

- The database will be exposed to the rest of the system by a set of REST services. This decouples the database from the other application modules and allows us to implement domain object security ACL's at this level.

  Using REST services to access the database in a stateless environment has an impact on the performance, we advise to include load tests to assess the impact.

- We recognise there will be a set of devops components that are not part of the 'system' but do delivery the day-to-day deployment, testing, build and continuous integration environment (shown on the right side of the diagram).

Technology decisions
- Innovate UK has a working setup for SSO based on Open AM. This SSO system can be used in front of the IFS system to authenticate. We do not introduce new authentication mechanisms or user database with the introduction of IFS.

  Since the system consists of stateless services, we plan to work with a token based system where the end user holds a security token that gives access to the required data (token service). The details of the SSO process and the combination with the LDAP repository needs to be included in the detailed technical design when this feature is delivered.

- We have selected Spring framework to deliver the custom Java based modules in the system. The Spring system framework provides a big part of the needed security features. Spring is a proven enterprise ready framework with a good track record and userbase, and delivers the needed REST and microservice modularities.

- For the frontend we have selected an HTML5/CSS/Javascript based setup. These components will deliver the one page application feel for the end user and we are also able to deliver the required accessibility standards.

- We use an out of box ORM layer like JPA/Hibernate to access the database.

- Email services will need to address anti-spam features like SPF records and backlist prevention techniques. We foresee an external email service to handle email sending and managing bounces and anti-spam.

- The java application will run on Apache Tomcat.

- The workflow service will expose methods to the application to update the state of the process of objects in the system (like an application).

Workflow

The applications are running through several processes before they become actual projects. There are several steps where different parties have to perform actions e.g. submitting of the application, assessing, etc. This process for CR&D is predefined and will not change.
The workflow solution will be positioned centrally and close to the data layer, such that the different components can make use of this module if necessary. For the current CR&D application process the following requirements should be met in terms of the workflow process:
- It should accommodate in following the process and step through the process, by transitioning from one state to another.
- During the process the different tasks should be able to be assigned to a certain role.
- Only certain users can perform certain transitions, permissions must be evaluated.

- Transitions are not only initiated by users, but can also be triggered by batch processes or set moment by an event mechanism.
- The different state changes should be logged.
- Longer processes during the transition (e.g. mailing many people or processing documents, etc.) should take place asynchronously.
- Workflow elements should be reusable and flexible.
- The workflow component needs to be able to be configured up to a certain level – for instance switch on or off steps for a competition.
- Preconditions for certain workflow transitions are part of the business logic of the application and need to be enforced to ensure data integrity.
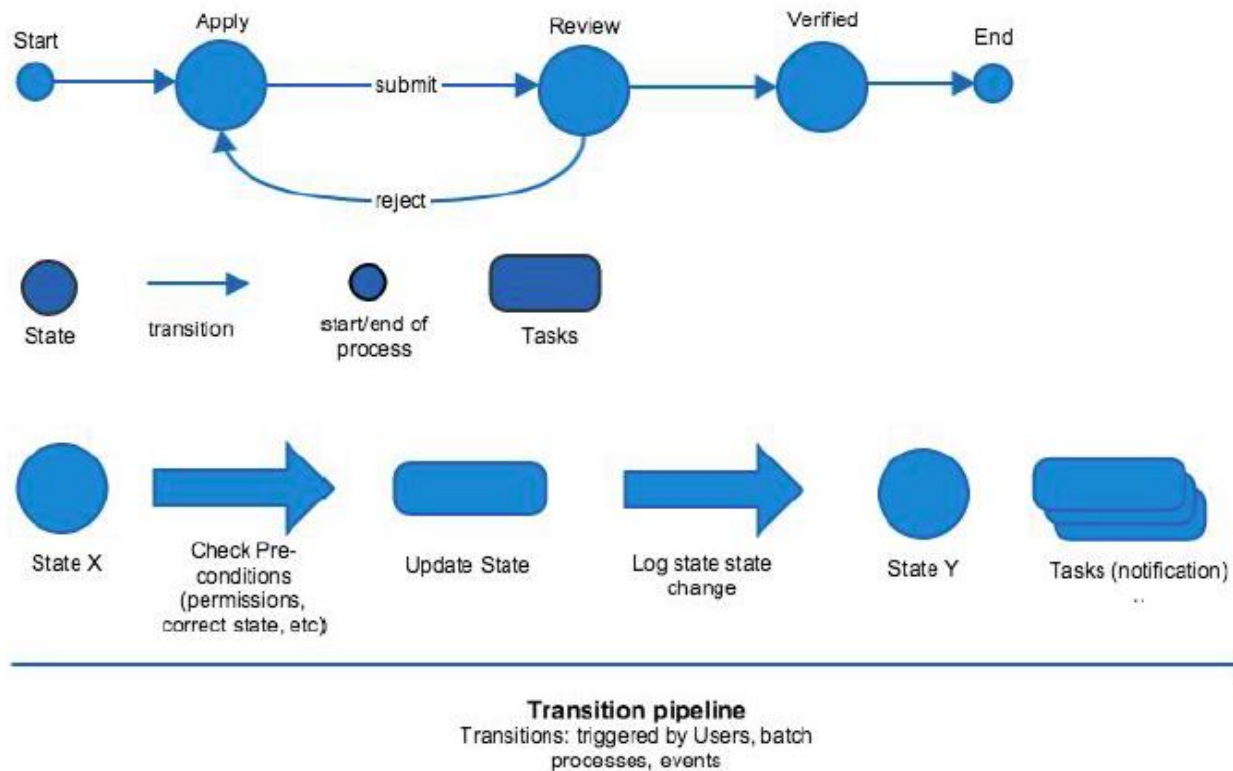
At this moment these are just basic requirements and therefore we have not chosen to start with an off-the-shelf workflow engine like JBPM or Activiti. The following has been considered for when you do need to consider using a workflow engine:

- The workflow needs to be able to be changed by the business.
- Visualisation of the workflow / modelling is required.
- If you expect the workflow to change often, and want non-devs to be able to make the adjustments – go workflow engine.
- If you need rich workflow features later in the applications lifecycle, you can have all of these out of the box in the engine (like forking, merging, rule based decisions etc.)

The reasons not to choose a workflow engine is that it is quite a large component to introduce where it does more than (in this case) we need, which might result in issues that are not easily resolved and a steep learning curve.

The following elements will be introduced for the CR&D process:
- Workflow supertype, with CR&D Workflow as one variant.
- It consists of transitions and states and tasks.
- States are stored in the domain object concerned (application, or competition or assessment invite).
- Tasks are reusable units like informApplicant, updateState.
- Transitions have preconditions which check if the object is allowed to make the transition, the right user is requesting the transition etc. At the end of the transition, the state has changed.
- Transitions have permissions. Only certain users can perform certain transitions.
- Transitions are running in a transaction – so they are atomic.
- Transitions are logged in the audit log.
- Transitions can be triggered by end users (with the right permission), by batch processes or triggered at set moments by an event mechanism.
- If a transition is dependent on multiple preconditions, we listen to these events to execute the preconditions.
- Longer running processes may run asynchronously so the user does not have to wait for these to finish while his request runs.

Start Apply Review Verified End

submit

reject

State   transition   start/end of process   Tasks

State X   Check Pre-conditions (permissions, correct state, etc)   Update State   Log state state change   State Y   Tasks (notification)

Transition pipeline
Transitions: triggered by Users, batch processes, events

Due to the flexibility of the workflow, the different states are not calling each other, since you may want steps to be reused multiple times in different combinations. The workflow holds decisions which way to go. Based on states, certain actions are enabled. We define a limited set of states per object.

For the CR&D process the following workflows are currently identified:
- Project setup (a set of tasks to be completed by one or more parties) – per application. (Listener on save event for a certain object – evaluate if an automatic transition is needed).

- Competition timeline (adjusts the state of the competition – driven by set timelines and data in the competition) (con process driven which may run a transition at set times) – alternative is a logical order, all previous states have been completed.

- Application state workflow (previously submitted, submitted, in progress, open, awaiting assessment (waiting for deadline to pass, precondition), successful, unsuccessful) (user interface might trigger the transition)

- Assessor allocation (invited, accepted)

We have considered various issues around locking, concurrent updates and race conditions in the workflow:
- We do not use locking on a database level.

- We use transaction for workflow transitions. A check of the current state of the workflow during the state change will be part of the transition. If two people transition the workflow at the same time, only one will succeed and the other will be rolled back.

- We don't expect concurrent updated to be a significant issue, due to the fact that only one user can change application state at a time.

Integrating with systems outside of the IFS (System Integration Layer)

- One of the modules might need to retried data from one of the systems connected to the SIL – to do a postcode lookup for an end user to auto-fill an address. The module will get in contact with the SIL by means of an API/SIL library that is included and provides the methods to do so.

- It is also possible that a process where no users are involved directly needs to get data from the SIL. It can do so by contacting the SIL through the same library by the process.

- Sharing data with the SIL can be done on a data level (with every crud operation) if the SIL is interested to subscribe to these events.

Application Security

Security is a big topic and to be effective it needs to be addressed in all layers of the solution stack – not just in the application. For example: datacenter, network and OS security needs to be addressed as well, but is not in the scope of this document.

Main security risks identified

Security starts with identifying the risks involved.

- Logged in users of the system being able to access data that they should not have access to.

- Anonymous users getting access to confidential data

- An individual getting access to someone else's user account (potentially an assessor or someone with extended permissions).

- An individual making changes based on unauthorised access.

Application security

- No local password storage, we use a central login facility providing SSO / SAML. The application will use a token provided by the central facility.

- We secure data access as close to the data as possible – in the model. The data layer is called using a usertoken that only gives access to the required items.

- We limit the attack surface by making sure there is a separate management interface. The other interfaces will only have access to a small portion of the data in the system.

- We use ACL security level for domain object security, implementing Spring Security.

- We apply the Spring security module providing (among other) CSRF protection.

- Spring SAML plugin for authentication and central user management.

- We did consider encrypting whole filesystem, db or fields. In those situations the system would need to store the key to get access to the data, which defeats part of the purpose. For now we have decided against encryption of the whole database or filesystem.

Secure coding practices

- We advise using a security checklist for web development like:
  https://www.certifiedsecure.com/checklists/cs-web-application-secure-developmen.pdf

- We advise using OWASP tooling to check the application for security flaws.

- Escape at the leafs. We escape in the places it is necessary, for instance on the output for XSS prevention, or on the query for injection prevention. All types of XSS will be covered.

- The spring data binding needs to be configured correctly to prevent security issues. We advise to implement specific automated tests to ensure this sensitivity does not cause issues.

Authentication

We envision the final solution to be placed behind a proven authentication solution like CAS, Shibboleth, OpenAM or a central government authentication solution. We plan using Springs SAML plugin to allow authentication and central user management.

For special roles (roles that give access to multiple applicants' data) we foresee two factor authentication.

For Public API Access, we implement that OAUTH2 mechanism that Spring Security supports.

Authorisation

We will apply Springs Security framework to implement interceptor that do pre-invocation authorisation on methods, and domain access security control before accessing objects.

In some cases also post-invocation security methods can be applied to filter data before it is returned to the end user.

For the support purposed special security controls may be applied that allow support users to get access to end users records for a limited amount of time. The authorisation checks are set up on a deny by default basis – access is only granted when this is explicitly done in the required methods and domain ACLs.

Data validation

Data will be filtered for malicious activity:

- Escaping, injection of SQL/JS. This will limit XSS risks.

- We will use Spring Security CSRF protection to include random security tokens in form submissions, file uploads and ajax requests. This will ensure the request is coming from the trusted application.

- File uploads will be checked on data type and will be virus checked.

Data will be validated on three levels:

- On a domain object using Springs annotations, making sure the users data that has been entered is valid.

- In the controllers, checking if the user input and activity is valid in the context of the object.

- On a state change in the workflow, checking if the object has a consistent state. This will ensure an application only get to a certain state (for instance 'accepted' in the case it complies with all the rules that have been set for the state.

Auditing and Logging

We foresee using a Spring aspect to apply audit logging to all relevant methods logging date/time, user, access permission, IP address, and the object involved. This way it is possible to trace back changes that have been made. In the case of a compromised user account, the changes made can be traced back to the account.

Application exception Management and Monitoring

Application exceptions are logged and this log is monitored. Suspicious activity if often started with trying to do invalid things which can be logged and spotted by monitoring the logs.

Data protection in storage and transit

- Domain Object Security – Spring ACL

- When an application is completed (either accepted or rejected), access permission on sensitive data will be removed, limiting the access to archived data completely.

- User Passwords will not be stored in the solution, but in the central authentication system. This solution will ensure the password complexity requirements.

Since the SIL is still in development, security in combination with the SIL is not yet designed.
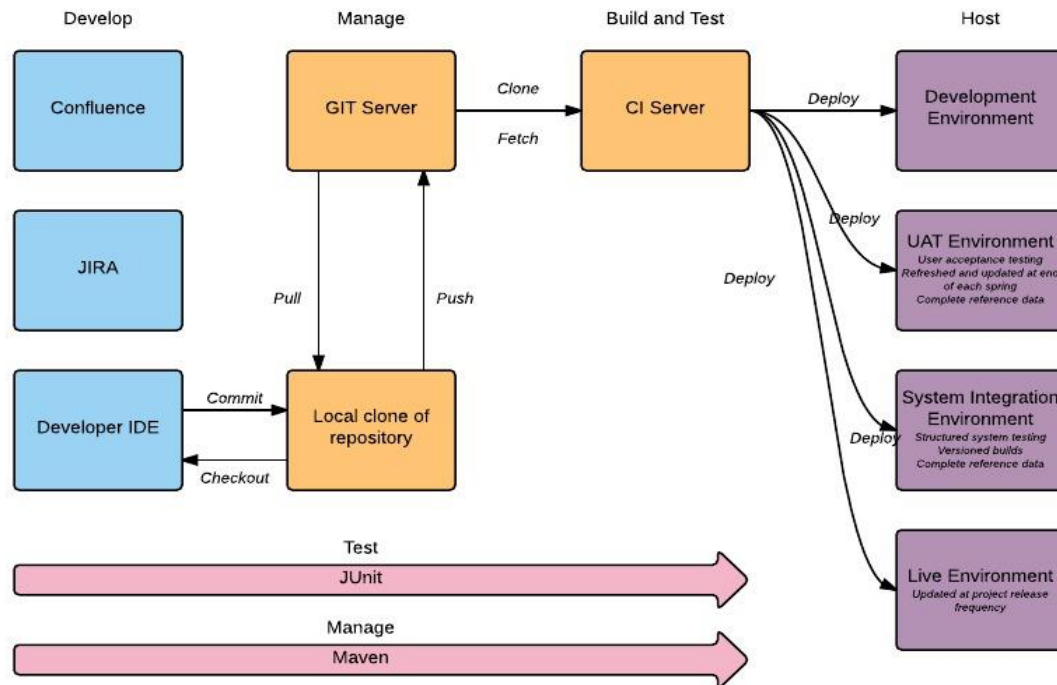

TEST & DEVELOPMENT REQUIREMENTS

To develop a test strategy to describe the following:
- Test org – roles and responsibilities
- Test objectives
- Test Methodologies
- Testing lifecycle – What testing is done and why – covering different test phases, test types and techniques, generic entry/exit criteria, typical inputs and outputs, environments, test data; how testing contributes to the overall lifecycle including quality and acceptance gates, testing ownership and responsibilities between Innovate UK and Supplier for unit, component integration, system, system integration, performance, security, operational acceptance and user acceptance.
- Test Design Inputs
- Test Deliverables
- Test Measurement
- Test Process Improvement
- Assumptions and dependencies
- Risk and Issue Management
- Communications and Reporting
- Test Environment Strategy
- Test Data Strategy
- Test tool Strategy
- Configuration and Change Management
- Release Management
- Constraints

DevOps and Environments:

Innovate UK will provide DevOps tools and hosting platform for the application and we envision our complete hosted environment as below:

The supplier is expected to use our DevOps tools and hosting platform and define the required environments to support the development lifecycle. An agreement will be reached collaboratively as to how these environments are shared within the various teams working for the project within the lifecycle.

All environments should be documented with respect to logical and physical setup, hardware, software used etc.

REQUIRED CAPABILITIES AND OUTCOMES OF THE SUPPLIER

Required Capabilities and Outcomes of the Supplier	
Capabilities	**Outcomes**
Agile Product Design & Delivery	Scrum-master and project management skills (to be able to answer resourcing based questions and understand planning)
Software Engineering and Ongoing Support	Developer to work alongside User Researcher and turn UX design into Front-end code. Back-end developers also required. Understanding of different testing environments, code deployment and maintenance.
User Research (UX Design)	Ability to work with Front-end developer to turn sketches into real-life code that can be tested with users. User testing skills essential.

THE METHODOLOGY

We would expect Supplier to work within an Agile Methodology as per the GDS Service Design Manual.

GOVERNANCE

Expected meetings/reporting:
Daily scrums
Sprint checkpoint reviews
Sprint reviews
Sprint retropectives
Sprint planning sessions
Highlight reports – TBC (frequency TBC also)
Senior Stakeholder team meeting if required, to discuss high level progress and mitigate any risks/issues.
BIS assessment – checkpoint review required ahead of moving into private beta in February 2016.

TERMS AND CONDITIONS

Please note that Customer specific Terms and Conditions apply to this agreement. Please refer to the Call-Off Contract Part A, for further information. Please note that these terms will supersede the standard terms within Call-Off Contract Part C Call-Off Terms and Conditions

EVALUATION STAGES, MINIMUM PASS MARKS & PRICE EVALUATION

Evaluation will follow the approach below:

- Technical & Cultural evaluation
- Demonstration, Testing and Scrutiny
- Pricing evaluation

MINIMUM PASS MARKS

In order for Potential Providers to progress they must achieve or exceed the Minimum Pass Mark, as defined in the Award Questionnaire.

Stage 1: Technical & Cultural evaluation	All Potential Providers who achieve the required Minimum Pass Mark for a Lot will be added to the Short List, and will be eligible to continue in the Further Competition.
Stage 2: Practical Demonstration, and Scrutiny of the resources proposed by the supplier	Suppliers who meet the Minimum Pass Marks specified for Part A Supplier Confirmation, and Part B1 Written Submission; will be required to complete Part B2 Practical Demonstration of a particular skill (specified within the Award Questionnaire) in order to evidence capability. Supplier resources will be required to respond to the Scrutiny questions stipulated within the Award Questionnaire. Each shortlisted Supplier must achieve the Minimum Pass Marks identified in the Award Questionnaire to continue in the Further Competition.
Stage 3: Pricing evaluation	For each Further Competition the Customer has a choice as to how they wish the pricing to be evaluated. In this instance the Customer has specified Combined Evaluation as their chosen price evaluation method. For more information please see the Evaluation Guidance document held on the e-Sourcing suite. Please note that pricing will only be evaluated for those shortlisted suppliers that have met the Minimum Pass Marks for the preceding evaluation stages