**Project ICT system : ICT Escalator**

**Project Overview**

ICT Escalator is a 3 year ERDF project from the 2014-2020 programmes which is being led by the University of Bedfordshire. The project provides a first connection between SME businesses and Universities to support businesses to trade online. It will operate across the South East Midlands, an area which covers Aylesbury, Banbury, Bedford, Bicester, Daventry, Kettering, Leighton Buzzard, Luton, Milton Keynes and Northampton.

The objective is to provide 150 businesses across the geography with a short, expert intervention looking at how a business might use online trade as a way to access new markets or offer new products or improve productivity. A second element of the project is the grant element whereby a business may apply for a grant of between £1-15,000 at a 30% intervention rate to deliver the plan laid out in stage 1. Businesses will be supported to deliver new to market and new to business products and services. Additionally 55 new businesses will be helped to start up from scratch.

The University of Bedfordshire is the Accountable body and is responsible for the delivery of outputs, project management and financial accounting and compliance with ERDF regulations. Any contract resulting from this enquiry is issued under the University’s terms and conditions including payment terms.

**System requirements**

*Overall*

The University needs to have a system in place to track and manage the delivery of the project. This brief is to procure this system. The purpose of the system is to automate as much of the processes as possible, providing an auditable, low-carbon method of managing approximately 300 small-data-volume users. It is unlikely that the system would have to cope with more than 15 concurrent users.

The system will be a web based application with role-based restricted access to many areas of the site. Our preference is for an open-source content management system such as Drupal or Wordpress operating through a cloud hosted environment. This must be compliant with CESG Cloud principles found here: <https://www.gov.uk/government/publications/implementing-the-cloud-security-principles/implementing-the-cloud-security-principles>

There will be at least 6 levels of user and they will all be involved in some form of workflow –

* Client SMEs
* Graduates
* Academic Experts
* Project administration staff
* Project Strategic Partners
* Project auditors

Content Types will include Text, Date, Time, Geolocation, File attachment (Word/Pdf), articles, webforms, “Events”, books, online course delivery (format to be agreed,likely to be mix of video and text), actions, triggers, taxonomies.

*Tracking and Monitoring*

We require a system that allows workflow actions to be taken within the system rather than recording the actions after the event. We would therefore look to be able to set forms which can be completed in the system and then tracked. E.g. we would like to be able to receive a business registration and then refer to a university member of staff directly within the system rather than needing to track it after the event.

The customer journey and process map (Appendix to this document) set out the stages of the customer facing and internal project management that need to be delivered through the system. All aspects of the customer journey and process map should be covered by the system. It also needs to include the feedback and communication loops indicated.

*Access*

The registration of the businesses online via a publically accessible website is an essential first element of the site. The public element will be a marketing tool of the site with an individual domain name (e.g. www.ictescalator.org) which people can access to find out about the project and register.

The bulk of the system has to be accessible to each delivery partner and the University but not more widely. This will comprise the management of the project and the businesses through the project to track and manage progress against key performance indicators upon which the funding depends.

These fields which are essential for reporting and tracking are contained in Appendix B. All business enquiries need to be managed and tracked as they move through the customer journey of triage, expert assistance, innovation action plan, graduate placement, grant and outputs. At Appendix B, we attach the outputs and fields that we need to monitor throughout the project and collect information and report to management teams and senior steering group.

*Reporting*

We need to be able to monitor closely by geography and delivery partner by quarter to ensure progress against forecasts with regular reports to project teams and steering groups. This includes managing leads into the projects right to the final attainment of outputs and outcomes which may occur 6 months after completion of a piece of business facing work. The web application must be accessible from anywhere with an internet connection.

The system needs to include business customer contact data as well as the tracking data. The system must include a mail-server setup with a single outgoing email address. The system needs to include a file storage system which allows all related paperwork e.g. triage forms, grant application, funding agreement – which may be in word or scanned in from hard copies. This also needs to be accessed remotely.

It needs to be capable of regular and easy reporting on progress by geography and delivery partner by quarter. It needs to be able to track the stages of the process and specifically allow grant management and tracking. It needs to include systems to flag underperformance and prompt action. Appendix B indicates critical priorities for reporting. The brief covers the preparation of reporting templates for the project in Excel and word format.

The system needs to have clearly defined forms and fields with drop down boxes for each field to prevent non-standard answers been added and to allow consistency and ease of reporting.

*Security*

The system will be hosted by you or a service you nominate, therefore you must ensure adequate security behind firewalls. Any arrangements and proposals for hosting and security will need to be signed off by the University partners.

*Responsive / Mobile Friendly*

The website should be fully optimised for mobile devices.

*Resource/File Management*

Applicants will have their own storage area on the server for documents relating to their application, and they should be able to upload and manage their own documents at any time during the process, be able to attach them to form submissions etc.   Permissions will be that no applicant should be able to see any details of any other applicant other than that outlined in the geolocation section below.

*Message/Alerts*

Officers should be notified when new applicants have registered, alerts should be issued if deadlines are not met or stagnation is highlighted....there will be dozens of reasons to issue automated messages or alerts which will keep the system flowing. This should be achieved using Cron, Triggers, Events and Calendars/ Dates. System supervisors will require training to create their own events/triggers if required.

*Timeline Visuals for PMs and Administrators*

Timesheets should be a function of the system – a template is available.   All users of the system should be able to create a timesheet per month.  Times should be linked to individual SME projects, and potentially a visual dashboard could be created, subject to budget.  This should not be available to applicants.

*Export Forms & Reports*

There will always be a large proportion of users who will want to download and print forms and reports. The system should offer a one-click option to do this, including an option to email to another person/s.  Exports should be in .xls or .csv format

*Geolocation/ Maps Integration*

The system should include a single page pin map to geolocate the SMEs that register as users of the system.

*Testing*

The timetable has provided for 4 weeks testing. We will require all systems elements to be tested by delivery partners and the accountable body prior to going live. We will need to include public facing testing, administration testing and academic testing. The system will not go live until full testing is complete and system requirements have been met. After any corrections we will require system retesting.

*Training*

We would also require that guidance and training is provided to all partners to ensure the effective use of the system. We would look for 2 days of training split into 2 or 4 sessions delivered at the University of Bedfordshire. Training rooms and refreshments will be provided by University of Bedfordshire.

*Maintenance*

After design, we will require that the system is updated and maintained to protect full functionality, especially with installing security updates to modules as they become available. We will require contact within 24 hours and a fix within 48 hours of any system failure. This support will be available until 31 December 2019.

*Non-disclosure*

We will require the successful bidder to sign a non-disclosure agreement for the length of the contract.

*Additional resources*

There may be occasions on which we need to procure additional support. Within your quotation, please indicate your day rate for these commissions. We will assume a flat rate with RPI uplift each year on the anniversary of the contract.

*Payment schedule*

Subject to the terms of the funding agreement for the ERDF funds, we will pay in the following payment pattern subject to formal contract negotiations:

* 80% of the contract value will be paid in 2016/17:
  + 20% at contract start
  + 20% at testing stage
  + 20% at live system stage
  + 20% after 4 months of operation
* 10% at beginning of year 2 – anniversary of live date
* 10% at end of year 3 when the entire application and website is archived onto an external hard-drive and this is received by the project manager.

The systems need to be in place from 15 January 2017 and the project lifetime is until end of 2019. All records will need to be available for audit until 2030. This will be achieved via archive onto hard drive which will be stored by the University of Bedfordshire project manager.

* Procurement live: 16 Nov 2016
* Closing date: 30 Nov 2016
* Contract appointment: 16 Dec 2016
* Design and build of system: 17 Dec 2016 – 14 Jan 2017
* Testing: 20 Dec 2016 – 14 Jan 2017
* First stage live date: 15 Jan 2017
* Fully working system: 28 Feb 2017

Review and update meetings : fortnightly and weekly updates with the project manager – mostly e-meetings, but minimum of 3 face-to-face meetings at initiation/ First live/ Full System for sign off.

Ongoing support period: Jan 2017 - December 2019 – this should include installing routine updates to Drupal/ Wordpress/ Server as required, storing an automated backup (1 backup to be stored every 24 hours, only one backup required at any one time) and restoring the system should it be compromised.

**Budget**

There is a budget of £18,000 including VAT for the procurement of a system to deliver this and any procurement must be ERDF compliant. The £18,000 covers both the design and the maintenance but does not include hosting. There is a budget of £1,000 including VAT for hosting costs. Please indicate clearly if your business is VAT registered.

**How to Tender**

*Please complete the pricing grid below and send with your tender return.  This tender will be evaluated on price 80% and supplier’s proposal.*

*It is a mandatory requirement to submit the information required in this tender.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Description** | **Year 1** | **Year 2** | **Year 3** | **Year 4** | **Year 5** |
| *Year 4 & 5 are outside of the budget scope & may not be required as per tender documentation* | **Price ex VAT** | **Price ex VAT** | **Price ex VAT** | **Price ex VAT** | **Price ex VAT** |
| System development including workflows, email server, reporting tool |  |  |  |  |  |
| Hosting |  |  |  |  |  |
| Maintenance and security |  |  |  |  |  |
| Testing |  |  |  |  |  |
| Training |  |  |  |  |  |
| Additional Resources |  |  |  |  |  |
| Additional costs |  |  |  |  |  |

Tenderers are asked to submit their proposal by 30 Nov 2016 and should include:

* their full registered business/company name, main office address and contact details
* brief details/background of the organisation and financial standing
* an indication of how you would approach the project to ensure both timely delivery and an outstanding, friendly resource for the public
* Where the web application would be hosted
* How data will be secured, referring to the choice of contributed modules and themes of an open-source system and the hosting environment
* a project timetable for delivery, and project management plan (including identifying any risks in meeting the proposed timescales, and how these could be mitigated)
* Cost according to the table above
* details of the proposed project team, and their background, including evidence of previous experience
* contact details of the proposed delivery team and their availability
* two references from previous clients

Please send your submission via the Intend website. From these responses a selection of bidders will be invited to discuss their proposals in person at the University’s campus in Luton (90 minute maximum slot) – please keep Wednesday 14th December free for this purpose.

All correspondence must be sent through the Intend system for audit purposes.