

Knowledge Transfer Network

**Resource Management and Portfolio and Project
Management
Software Service and Implementation Support**

Invitation to Tender Statement of Works KTN-ITT6412-01

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1. Background

KTN is the UK's innovation network; we work in support of UK businesses to accelerate innovation. We work in support of UK government, primarily funded by Innovate UK (UK's innovation agency), to connect innovators and entrepreneurs to knowledge, technology, funds and markets. We particularly seek out - and seek to support through networking - high-growth-potential innovative businesses that can make an impact on the UK economy through improved productivity, jobs safeguarded and created and GVA contribution.

We undertake a growing and broad range of services, including delivery of small to large projects/programmes. As our activities grow in scale and complexity we are keen to ensure our organisation has the right tools to support resource management in a highly dynamic environment as well as project and portfolio management.

We are reviewing resource, portfolio and project management software to assess suitability for deployment in KTN:

In Scope: Resource Management, Portfolio Management and Project Management

Out of scope:

- New Finance system - Integration is desirable but not essential. It is essential to be able to extract work hours data.
- CRM functionality

2. Services Required

The purpose of this request for quotation is to:

- I. Invite suppliers to describe the features and capabilities of software they recommend, tailored towards KTN requirements.
- II. Invite a quotation for licenses for the software presented
- III. Invite suppliers to describe their approach to supporting KTN in configuration and implementation of the tool should KTN choose to proceed.
- IV. Invite suppliers to provide a quote for the services described in III.

The following business processes have been identified that could be made more efficient by implementation of a RM / PPM tool:

- i) Resource Management;
- ii) Approval of Projects / Activities;
- iii) Delivery of Projects to agreed scope, time and budget;
- iv) Time Recording;

v) Management Information – Reporting and Dashboards.

Appendix A sets out the product features / requirements that KTN has identified for a Resource Management and Project and Portfolio Management solution.

3. Deliverables Required

Approach to configuration and implementation

The following deliverables are required in the event that KTN decides to proceed to software configuration and implementation:

1. KTN requirements and 'work flows' implemented in the system, pilot tested and ready for Go Live.
2. Delivery of Train the Trainer course (s) and supporting materials. This involves training a small number of KTN staff who subsequently train the other employees.
3. Delivery of training to a small number of staff such that the software can be maintained, adapted and configured by KTN staff after Go Live (with minimum external support)

4. Quote for Services – Fees

KTN requires the majority of staff to use all features of the system; although for most staff this will be on only a few occasions in any given year. There will be a subset of staff who use all features continuously throughout the year. This presents a potential significant cost to KTN if a conventional licence model is used, such as the supply of lower and higher licence costs depending on access to software features. We therefore expect the successful supplier to be able to demonstrate flexibility and imagination in their approach to licences to minimise the cost to KTN, taking account of KTN's use of the software by their staff.

We require quotes for annual licences for 175 staff, with approximately 60 of those accessing the full features of the system on a regular basis and 25 requiring access only for completion of timesheets. All other staff will access the full features of the system on an infrequent basis of around once per month.

We also require a quote to support KTN in configuration, implementation and training of the software.

5. Term and Expiry Date

We require the system to be configured and tested by December 2017, ready for training of all staff in January / February 2018. The new system will be populated with new and ongoing projects in March ready for use by all staff from 1st April 2018 (Go Live date).

The commencement date for the start of configuration will be upon award of contract (estimated November 2017) with full licenses being active upon completion of configuration by January 2018.

6. Submission

In response to this Statement of Works please provide the information listed below. A narrative description of how the features of your software will address the functional requirements of KTN is important. The narrative will be used by KTN as part of the selection process for shortlisting suppliers. The shortlisted suppliers will be invited to present their system to KTN before a final selection is made for placement of the contract. Scoring of submissions will be weighted as follows: Software Capability 50%, Implementation Support 20% and Cost 30%.

6.1 Software Capability

- Please complete the table in Appendix A to confirm if these features are offered by your recommended product and provide brief supporting comments.
- Please provide a narrative to describe how your recommended product addresses each of the following areas: i) System Compatibility ii) Resource Management; iii) Approval of Projects / Activities; iv) Delivery of Projects to agreed scope, time and budget; v) Time Recording and vi) Management Information – Reporting and Dashboards.
- Provide an example .xls file and .csv file of a typical 'system' download to enable us to test how this would be managed by our other systems.

6.2 Implementation Support

- Staff resources and bios (relevant experience) of the people who will undertake the work
- Evidence of past or current work. Please provide the names of two clients of a similar scale with whom you could put us in touch to understand their experiences.
- A work plan describing in detail, your approach to supporting KTN in configuration, implementation and training, with associated timings. Please include detail of the commitment you expect from KTN staff to support the configuration and implementation.

6.3 Schedule of costs

- Cost breakdown for licences, system implementation and training with reference to the guidance in section "4. Quote for Services – Fees".

6.4 Additional Information

- Any additional services you could provide to enhance the project scope

6.5 Legal information

- Your standard T&Cs

Please provide the information requested above by 31st October 2017 at the latest. Submissions will be assessed on an ongoing basis until this date.

7. Principal Contact for the Invitation to Quote

Please direct any questions or communications on this Invitation to Quote to:

Claire.Claessen@ktn-uk.org

8. Terms and Conditions

This Invitation to Quote is subject to “KTN’s Terms and Conditions of Contractor Engagement – Company Edition”, which are provided separately.

Please note that KTN reserves the right to not select any supplier if we feel none meet our requirements and budget.

APPENDIX A – Product Features and KTN Requirements

| Product Features | Comment from Supplier |
|--|-----------------------|
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| Tool Fundamentals | |
| KTN uses Apple products including OSX computers and iOS phones. The product should be compatible with the latest versions of Chrome or Safari browsers | |
| Need ability to extract work hours for import into other systems for analysis | |
| We also need to be able to capture key data for each project using a project number. The project number should be automatically generated. Key data includes start and finish dates, owner, project type, funder, portfolio, time sheet data and status. | |
| Timesheet recording per person, per project and task. Timesheets should be able to be completed in advance to cover holiday periods. | |
| A software solution which encourages collaboration. The whole team should be able to see and interact with project data and documents. | |
| Ability to set permissions so people can approve, read and write data as appropriate. | |
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| System Compatibility | |
| Access to full features on tablet / mobile devices | |
| Integration with G Suite / GoogleDrive and Microsoft Office 365 / One Drive | |
| Easy integration with other web based applications, for example, through being compliant with Zapier | |
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| Resource Management | |
| Viewing resource utilisation across teams, portfolios and the company | |
| Ability to show availability of resource as well as commitments (e.g. I'm available for projects and not yet committed). | |
| Resources - assign named individuals per task and generic role types + multiple individuals per task | |
| Is it possible to vary resource loading for a task resource in time (e.g. three days in Sept, five in Oct, one in Dec etc) or is it automatically calculated pro-rata? | |
| Google calendar integration | |

| Product Features | Comment from Supplier |
|---|------------------------------|
| Ability to put projects 'On hold' then easily move the plan when they start again? How is resource allocated to 'on hold' projects dealt with by the system? | |
| | |
| Approval of Activities | |
| Ability to do approval requests for different project stages including different sign off paths for different project types | |
| Templates for submitting project ideas / proposals - We need to be able to cater for different types of projects and have different proposal templates for each project type. This COULD also include a template project plan. | |
| e-mail notification for approvals – when approval is needed and when approval is given. | |
| Ability to attach documents – Word, ppt, pdf, Excel, jpg formats | |
| | |
| Planning and Delivery of Projects and Activities | |
| Need to be able to build a project plan (doesn't need to be a Gantt chart), including tasks and dependencies. Gantt chart could be an attached document but we need to have a representation that enables us to understand the flow of the tasks in the system. | |
| Be able to add milestones, target dates and constraint dates | |
| Save multiple versions of plan | |
| Display of resource availability as you plan | |
| Exporting to Office based packages - Excel, Word and PowerPoint | |
| Ability to do updates on project status - monthly status updates – ideally red, amber, green on a configurable set of criteria. | |
| Email reminders of tasks due | |
| Ability to include notes and journal entries - ideal if this links to timesheets | |
| | |
| Time Recording | |
| Timesheet function to ensure that time can only be charged to live projects and for some projects to ensure time can only be booked to a project if you are on the project resource list. | |
| 'Personalised' visibility of projects and tasks you are allocated to and can charge time to (within the timesheet). | |

| Product Features | Comment from Supplier |
|---|------------------------------|
| Electronic approval of timesheets by line managers for certain projects. Ability to set up a work flow where this is applied just to certain projects. | |
| Ability to set the number of hours in a working week for each staff member | |
| Ability to submit timesheets in advance | |
| Ability for Finance to have visibility of staff whose timesheets are incomplete. | |
| | |
| Management Information - Reports and Dashboards | |
| Once projects are in the system, we want the ability to view the projects in different ways - filtering and portfolio views. Tagging to pull together different views. | |
| Financial dashboard - tailored to project | |
| Ability to assign different rates to the same person depending on the project they are working on. Therefore to be able to view the cost of work as well as the hours spent (based on people time spent on the project so far). | |
| Ability to view the cost of work to date at a project, work package and task level. | |
| Ability to view time spent on the project to date at a project, work package and task level. | |
| Portfolio view of project status – red, amber, green against configurable criteria | |
| Attractive, intuitive and easy to understand visual graphics | |