

**APPENDIX B**  
**STATEMENT OF REQUIREMENTS**  
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**1. PURPOSE**

- 1.1 The purpose of this Procurement is to set-up an agreement between Her Majesty's Passport Office and a successful Supplier that will be able to provide Desktop-Based Data Visualisation Software and hardware. HM Passport Office requires access to a tool, with off the shelf standard survey software which also includes the freedom to design surveys and export results in real time.

**2. BACKGROUND TO THE AUTHORITY**

- 2.1 Her Majesty's Passport Office (HM Passport Office) is a directorate of the Home Office. It is the sole issuer of UK passports, and is responsible for civil registration services through the General Register Office. Established in 2006, HMPO provides accurate and secure records of key events and trusted passport operations. Their role is to issue passports to citizens of the United Kingdom on behalf of the Crown. They are the official Government service to British citizens at home and abroad. The General Register Office oversees civil registration in England and Wales. Prior to 2013, HMPO was known as the Identity & Passport Service.
- 2.2 Within HM Passport Office, the Customer Intelligence Team sits within the Customer Service Directorate. This Customer Intelligence capability enables HM Passport Office to influence business decision-making through timely and relevant Customer insight and intelligence.

**3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**

- 3.1 HM Passport Office has embarked on a quest towards delivering a world-class experience for their Customers. In the Customer Intelligence Team, they are working to develop more cost effective, innovative and responsive ways to identify and share insight for the business.
- 3.2 One way is to introduce touchscreen feedback mechanisms to measure their Customer Experience (CEX) at counter exits in real time. By introducing instant feedback mechanisms, they will be able to capture the customer sentiment in the moment and, where investigated, determine at which stage of the journey customers experience more challenges (both generally and regionally).
- 3.3 The Customer Experience at counters has been traditionally lower than the other channels. Surveying Customers in real time is expected to yield a higher response rate than traditional surveying. Third Party research suggests that Customer opinion collected at the point-of-experience is 40% more accurate than feedback collected, even as quickly as 24 hours later (Gartner, 2006).
- 3.4 A tablet positioned in a stand, or on the wall, at a counter exit has been determined as the most cost effective feedback device option. Specific feedback can be obtained through short customised surveys leading to detailed and fresh customer insight. Customers will be able to enter survey responses via the touchscreen device as they walk away from the counter. This information then needs to be uploaded to an online platform for real time access. The Customer Intelligence team will use the data collected in all counters, in combination with other sources, to improve HM Passport Office's customer understanding. Counter Managers can use locally collected data as part of their trend analysis to continuously improve their Customer Service performance, and to react quickly to changes.
- 3.5 HM Passport Office would like to conduct a Pilot at the Glasgow Office starting the week of 6 June 16. Should the pilot be successful a full roll out to each Area office, Durham, London, Peterborough, Belfast, Newport Wales and Liverpool by 1 August

2016. Should the pilot be unsuccessful the roll out to other offices will not take place and the contract will cease with no further costs to HMPO.

**4. SCOPE OF REQUIREMENT**

4.1 HM Passport Office want to purchase the Survey Tablets and software for a period of twelve (12) months (with an option to extend for a further twelve (12) months).

4.2 The details of their requirements are outlined below.

4.2.1 Hardware to be purchased:

4.2.1.1 8 x touchscreen Tablets . Each Tablet requires 1x Power Plug and Internet Connection. Wired internet connection is preferred and the tablet will have to support this.

4.2.1.2 8 x Support Systems to position the Tablets. These can be frames that will host the Tablets and will secure the tablet to the wall or table The support systems should be adjustable to meet requirements in the Equality Act 2010.

4.2.2 Office requirements:

4.2.2.1 Each office will have specific requirements. The Glasgow Office: 1 touchscreen tablet, 1 support system that will be secured to the wall.

4.2.2.2 Remaining office requirements; following a successful pilot the remaining sites require the following:

Durham	1 touchscreen, 1 secure table/wall mount support system...
London	2 touchscreens, 2 secure wall mount support system.
Liverpool	1 touchscreen, 1 secure wall mount support system.
Belfast	1 touchscreen, 1 secure wall mount support system.
Peterborough	1 touchscreen, 1 secure wall mount support system.
Newport	1 touchscreen, 1 secure wall mount support system.

4.2.2.3 Network links would be a broadband line per site plus router. HMPO could purchase through our current IT supplier CSC/BT.



4.2.3 Software:

- 4.2.3.1 HMPO requires each Tablet to possess the survey software, which is an off the shelf package which can be modified, that will allow their customers to give their feedback.
- 4.2.3.2 All suppliers should offer their survey software solution, including; customisation of the survey, the form and type of survey which should be as visual as possible for example: smiley faces, and include multiple choice questions, Yes/No questions and the ability for Customers to add comments etc. HMPO should also be able to change the questions when required and at no extra cost. We would like standard questions for all Area's along with some specific questions for each Area office if required
- 4.2.3.3 Major version software upgrades as well as major patches and hot fixes to be installed on the Authority's licences within 48 working hours of issue.
- 4.2.3.4 The software will need to include a personalised, online dashboard, where the data can be collected, viewed, analysed and downloaded in real time (or nearly real time) by HM Passport Office. The successful supplier will furthermore, need to be able to establish access profiles for HM Passport Office to access data collected locally in the Counter Offices and for two (2) key administrator. Details regarding access profiles are provided in point 4.2.5.2,
- 4.2.3.5 The solution will be deployed in all 7 regional offices following a successful pilot in Glasgow. Any signage and survey questions on the solution for Newport Office must also be displayed in Welsh as per the Welsh Language Act.

4.2.4 Volumes:

- 4.2.4.1 The online dashboard requires HM Passport Office to store 51,500 completed surveys per month. HM Passport Office require their customers to have the opportunity to complete the Customer Experience Survey every day during the opening hours of the UK Counter Offices, which will sum up to 1,700 responses daily (approx.) across the UK. The opening hours are outlined in point 8.1.
- 4.2.4.3 Potential suppliers should have the capability to upload online in real time, the data should locally stored on the tablet off line in case of lacking internet connection, and provide analytics on an online dashboard for up to 618,000 completed surveys each year (although the number is likely to be much lower). The supplier should retain the data securely with an annual purge. The data should be destroyed securely after this period or at the end of the contract.

4.2.5 Reporting:

- 4.2.5.1 HM Passport Office requires the successful supplier to provide an online platform that is accessible remotely, and that will store all survey replies. The supplier should provide software that allows an upload to a secure, cloud-based online dashboard in real time (or nearly real time).
- 4.2.5.2 The supplier should provide the opportunity to establish two (2) key administrators online dashboard, which will provide access to all the data collected from all eight devices. Two (2) devices will be situated at the London office. Furthermore, the supplier should provide the possibility to establish several user online dashboards, which show the information collected locally with each tablet. HM Passport Office requires two (2) main profiles to access all collected data and at least eight (8) profiles to access data collected locally. Additional profiles may be needed in due course during the time of the contract. Training of the software and dashboard will be required for each user and additional contingency staff.
- 4.2.5.3 All dashboards should be remotely accessible from any geo-location and provide some basic analytics functions, such as the possibility to view results in form of visualisations (graphs, statistics and league tables). All dashboards should provide the possibility to download data at no additional cost and with no restrictions to the certified user.
- 4.2.5.4 In case of temporary internet loss, the software should be able to store data on the tablet locally and automatically upload results once an internet connection is re-established.

**5. ADDITIONAL DETAILS**

- 5.1 The content of surveys, results obtained, and any other material generated by the software should be owned by HM Passport Office, and therefore cannot be extracted, distributed and used by Third Parties without HM Passport Office's explicit consent.
- 5.2 Evaluation of the contractor's Experian Credit Search will be carried out by Crown Commercial Service's "Commercial Intelligence" department, and any risk will be identified and referred to the Procurement Lead.
- 5.3 If there is any risk to the delivery of this contract being identified through this exercise Crown Commercial Service reserves the right to remove any bidder from this Procurement process.
- 5.4 Tender responses will be evaluated in two stages, outlined in Appendix D. The stages are summarised below for information only; suppliers must refer to Appendix D for response criteria and guidance.
  - 5.4.1 Stage 1: Suppliers to supply credentials to demonstrate expertise and a track record that meets the requirements as outlined above.
  - 5.4.2 Stage 2: The top 3 ranking supplier's will be shortlisted following evaluation of stage 1 will be asked to present their proposed solution against the criteria as outline within Appendix D – Response Guidance.

**6. SERVICE LEVELS AND PERFORMANCE**

- 6.1 HM Passport Office require one commercial point of contact, as well as one technical point of contact, to provide continuous customer support, for both the hardware and the software, throughout the contract duration at no additional cost.
- 6.1.1 The support is required to be online/telephone support, with the option for engineers to come to the site to resolve IT issues if necessary.
- 6.1.2 The response time is required to be 24 hours from receipt of an issue being raised.
- 6.2 The successful supplier should be open to present new ways of working to the Contracting Authority during quarterly Contract review meetings.
- 6.3 Changes to the way in which the services are to be delivered must be brought to the Contracting Authority's attention and agreed prior to any changes being implemented.
- 6.4 The Contracting Authority requires the supplier to provide a sufficient level of resource throughout the duration of the contract in order to consistently deliver a quality service to all parties.
- 6.5 The supplier's staff assigned to this contract shall have the relevant qualifications and experience to deliver the contract. This means specifically:
- 6.5.1 That the Supplier shall ensure that staff understands the Contracting Authority's vision and objectives, and will provide excellent Customer Service to the Contracting Authority throughout the duration of the Contract.
- 6.5.2 That the successful supplier should be accredited by the Market Research Society, or similar accrediting organisation such as AQR.
- 6.5.3 That the successful supplier should have significant and provable experience of several years in successfully consulting on, and designing of, customised surveys tailored to the Contracting Authority's needs.

**7. KEY MILESTONES**

- 7.1 HMPO require a pilot to take place at our Glasgow office and be in place and ready-to-use week commencing 6<sup>th</sup> June 2016
- 7.2 Following a successful review of the pilot a full staggered roll out to the remaining offices from 27 June 16 to 30 August 16.
- 7.3 Potential Suppliers should also note the following milestones that are required to be met:

<u>Milestone</u>	<u>Description</u>	<u>Timeframe</u>
1	Delivery of the Hardware (Tablets and Tablet mounts) to the Glasgow office.	Within 10 (ten) days of the Contract award.



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2	Installation and set-up of hardware at the Glasgow location, and going live with the Tablets and Software.	Within 10 (ten) days and two (2) weeks of the Contract award.
3.	Delivery of the Hardware (Tablets and Tablet mounts) to all locations	Within 1 week of the Pilot approval for full roll out.
4.	Installation and set-up of hardware at all locations and going live with the tablet and software.	Dates for a staggered roll out will be agreed following the Pilot and approval for a full roll out.

**8. LOCATION AND OPENING HOURS**

8.1 The Services will be carried out at HMPO’s Counter Offices in the following locations, during the following hours:

8.1.1 3 Northgate, 96 Milton Street, Glasgow, G4 0BT.

8.1.1.1 Opening hours: Monday – Friday 08:15 – 17:00 and Saturday 09:00 – 15:00.

8.1.2 Freemans Reach, Durham, DH1 1SL.

8.1.2.1 Opening hours: Monday – Friday 08:30 – 17:00 and Saturday 09:00 – 15:00.

8.1.3 Aragon Court, Northminster, Peterborough, PE1 1QG.

8.1.3.1 Opening hours: Monday – Friday 08:00 – 17:00 and Saturday 09:00 – 15:00.

8.1.4 Globe House, 89 Eccleston Square, London, SW1V 1PN.

8.1.4.1 Opening hours: Monday – Friday 07:45 – 21:00 and Saturday 09:00 – 17:00.

8.1.5 Law Society House, 90 – 106 Victoria Street, Belfast, BT1 3GN.

8.1.5.1 Opening hours: Monday – Friday 08:15 – 17:00 and Saturday 08:15 – 15:00.

8.1.6 101 Old Hall Street, Liverpool, Merseyside, L3 9BP.

8.1.6.1 Opening hours: Monday – Friday 08:00 - 18.00 and Saturday 09:00 – 15:00.

8.1.7 Nexus House, Mission Court, Newport, NP20 2DW.

8.1.7.1 Opening hours: Monday – Friday 08:00 – 17:30 and Saturday 08:00 – 15:30.



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**9. PAYMENT PROCESS**

- 9.1 A Purchase Order will be raised of which the supplier will be required to submit an invoice upon receipt of the Contract.
- 9.2 All invoices need to be sent to Home Office Shared Service Centre, HO Box 5015, Newport, NP20 9BB Prior to this, a copy of the invoice should be sent to the Customer Intelligence team to approve processing the payment.

**10. SECURITY REQUIREMENTS**

- 10.1 The successful Supplier needs to be certified to ISO 27001 (equivalents will not be accepted).
- 10.2 All Surveys should be conducted in line with the Market Research Code of Conduct.
- 10.3 Data traffic should be encrypted using AES256bit, or similar encryption, during transfer between the touchscreen device and the secure Cloud server.
- 10.4 Data collected through the supplier's touchscreens would be owned by HM Passport Office. The Supplier is required to hold it on HM Passport Office's behalf and never share it with Third Parties.
- 10.5 The server used by the supplier should; sit behind a managed, and ISO 27001 certified, firewall, run Anti-Virus Software and receive regular updates and patches to maintain security. All communications with the server should run via the TLS/HTTPS protocol.
- 10.6 Server storage should be configured appropriately to provide immediate resilience to data loss.
- 10.7 Secure backups should be taken to several locations to provide redundancy. It should be possible to recover data rapidly, on a wholesale or individual file basis.
- 10.8 All supplier maintenance staff must be CTC security cleared prior to installation of the equipment and software, and for the duration of the contract for maintenance purposes.