

**Quotation for**

**Business Intelligence/Power BI roll out**

**Contract Ref No. S&R/2022/38**

**COMPANY DETAILS**

|  |  |
| --- | --- |
| Organisation Name: |  |
|  |  |
| Address: |  |
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|  |  |
|  |  |
| Telephone Number (office): |  |
|  |  |
| Telephone Number (mobile) if applicable: |  |
|  |  |
| Point of Contact in Relation to this Quotation: |  |
|  |  |
| E-mail address of Point of Contact : |  |
|  |  |
| Name of Project Lead : |  |

**REQUIREMENTS/SPECIFICATION**

**Background and introduction**

* As with many other local authorities, one of Stoke-on-Trent City Councils’ key strategic objectives is to ‘Improve the use of data in decision-making and service improvement.’
* The Local Authority’s current approach to performance reporting and analytics is both dated and inefficient and does not take advantage of developments in data science and tools available.
* Reporting is primarily focused on past events, with limited self-service for managers to access real time data to understand how their service is performing to drive continuous improvements.
* A multitude of systems exist within the Council and current reporting platforms have very limited reporting and dashboard functionality.
* The Council has recently approved its Digital Strategy. This describes our ambition to become a digital first, data driven council. The foundation to this will be a review of our infrastructure, focusing on Cloud hosting as a way of achieving the agility and flexibility we need to meet our objectives

**Power BI**

* A business intelligence options appraisal was undertaken in 2020 to compare the available products on the market and Microsoft’s Power BI was selected as the preferred analytics tool.
* We already have in place a P1 SKU with several workspaces’ setup as Premium per capacity.
* An initial pilot approach was agreed for Power BI – with the development of six key Use Cases (reports) to better understand the benefits and help inform the future roll out.
* Three of our six Use Cases are already live. These reports (which are packaged within Power BI apps) utilise our own on-premise data warehouse via our Power Bi gateway and are refreshed daily.
* The development of Use Cases has been managed by a small Project team – who have effectively provided support around BAU activities but it is acknowledged that the current process we are utilising in order to get data into Bi and build reports is not scalable and will lack the resources necessary to move at the pace the Council require.

**Next Phase**

* We now need to start considering the next phase of the roll out to scale up the production of reports and develop a roadmap/implementation plan that is ready to commence early in 2022.

**Requirements**

1. Develop an understanding of the Local Authority’s existing data sources/systems and assist with the development of a data strategy/protocol.
2. Support the creation of a robust and realistic Business Intelligence/Power BI roadmap. Giving consideration of (but not limited to) the following: -
   * Data storage requirements and associated costs
   * System requirements and associated costs
   * Resource requirements
   * Timescales – ideally based on the previous experience of other Local Authorities
   * Phasing – ideally based on the previous experience of other Local Authorities
   * Opportunities in relation to Machine Learning and AI (Long Term)
3. Best practice guidance around the most effective way to transition existing reports into Power BI. Giving consideration of (but not limited to) the following: -
   * Getting data into BI (utilising direct queries / Large ‘Trusted’ data sets)
   * Enabling specified users from around the Authority to build reports (and not limiting this to the existing data team)
   * Access levels & permissions
   * Changing organisational culture regarding data/self-serve
   * Prioritisation of reports

**Key Deliverables**

1. Data strategy/protocol
2. Business Intelligence/Power BI roadmap
3. Power BI best practice guidance

**CONTRACTUAL ARRANGEMENTS**

Please find attached a template for our standard consultancy agreement.

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**EVALUATION (max 100%)**

**Assessment of responses to this invitation to quote are broken down as follows:**

1. **Technical Evaluations (60% of marks) broken down between:**

|  |  |  |
| --- | --- | --- |
| **Question** | **Weighting** | **Total % available (out of 60%)** |
| Method Statement | **20%** | **12%** |
| Relevant Experience | **60%** | **36%** |
| CV’s of staff engaged in this commission | **20%** | **12%** |

The technical responses will be evaluated using the following matrix:

Score 5 marks – if all requirements are met and response provided is excellent.

Score 4 marks - if most requirements are met and response provided is good.

Score 3 marks - if some requirements are met and response is average.

Score 2 marks - if answer provided is not comprehensive and below average.

Score 1 mark – if answer provided is poor.

Score 0 marks - if no information provided.

1. **Commercial Evaluations (40% of marks):**

* Total Price - 40% of marks

The commercial score will be calculated using the following formulae: Lowest Total Price divided by Bidders Total Tendered Price multiplied by 40% = marks awarded.

**TECHNICAL RESPONSE**

**1. Method statement (Total % available = 12%)**

Please provide a method statement for how, in the role of Technical Consultant, your organisation would provide the services outlined within the specification.

This should:

* demonstrate how you will deliver all services contained within the specification
* breakdown of allocation of work between staff and time in days allocated to each workstream

Please limit your answer to 500 words.

**2. Relevant Experience (Total % available = 36%)**

1. The specification is provided as a guide to the requirements of the project. Tenderers are required to indicate with a tick (🗸) in the ‘YES’ column for the items they comply/meet the requirement. Where tenderers provide an alternative to the requirements these should be identified by placing a tick (🗸) in the ‘NO’ column. Further information/detail should be provided in the comments section for either selection. Any alternative must then be acceptable to the City Council and may fail if deemed not a suitable alternative.

|  |  |  |  |
| --- | --- | --- | --- |
| **ESSENTIAL REQUIREMENT** | **Fully Compliant (🗸)** | | |
| **Yes** | **No** | **Comments** |
| 1. Produce a data strategy document for the authority |  |  |  |
| 1. Produce a Business Intelligence/Power Bi roadmap for the authority |  |  |  |
| 1. Power BI advanced implementation experience. Ability to provide best practice within our own environment currently P1 capacity, running for 12 months. |  |  |  |
| 1. Knowledge and advice on capacity management/future growth. Future cost assessment/projection |  |  |  |
| 1. Knowledge and advice, including but not limited to Power BI administration, policy and configuration. |  |  |  |
| 1. Advice on setup of version control |  |  |  |
| 1. Creation of procedures/workflow for requests of new applications/reports |  |  |  |
| 1. Create decision flow document, to guide report requests, to define how data should be stored/refreshed. |  |  |  |
| 1. Review of existing staff numbers/capacity in each area to create and maintain power BI. Forecasting based on end position to predict potential staffing increase, based on experience of other authorities. |  |  |  |

1. Please can you provide details of how you have helped an organisation create a data strategy (preferably an equivalent sized local authority)? Are you able to provide an example of the data strategy document?
2. Please can you provide details of how you have helped an organisation develop a Business intelligence/Power Bi roadmap (preferably an equivalent sized local authority)? Are you able to provide an example of the roadmap?
3. Please can you provide a list of examples of ***Power Bi Premium*** implementations (containing many data sets and varying data sources) that you have supported?
4. We’ve started our Power Bi journey and we are looking to understand best practice (based on your experience) of how to scale quickly in an organised, flexible and sustainable manner. Please confirm how you can help us achieve this?

Please limit your answer to 2,000 words.

1. **CVs of staff engaged in this commission (Total % available = 12%)**

Please provide an overview of the key people (team) you will put forward to work with customers, their experiences and competencies. To support this answer please provide CVs of your team (minimum of 1).

**COMMERCIAL RESPONSE**

Please complete the following pricing schedule:

**NOTES: The price quoted must include all disbursements and costs but be exclusive of VAT. No additional costs will be accepted by the City Council.**

**The Total Price will be used when assessing the Commercial Submissions.**

**Please complete the total price**

**(which will be used to assess the commercial submissions)**

|  |  |
| --- | --- |
| **TOTAL PRICE** | **£** |

**Should you provide any information beyond what we have requested within this quotation we will NOT take this information into account when assessing your proposal.**

**RETURN INFORMATION**

Please return a completed quotation to:

e-mail: CentralPMO@stoke.gov.uk

**by no later than 5pm on 11-Feb 2022.**