# general

All proposals and questions should be sent electronically to tenders@ukces.org.uk and must arrive by the closing date and time detailed in the Timetable below. Tenders sent by any other method or route will not be accepted. It is the responsibility of the tendering organisation to ensure that their proposal *reaches* the UK Commission by the deadline date and time, **any tenders received late cannot be accepted.**

# Background

Since 1991 Investors in People (IIP) has set the standard for better people management. Our internationally recognised accreditation is held by 14,000 organisations across the world. The IIP Standard defines what it takes to lead, support and manage people well for sustainable results.

Investors in People launched a new CRM system, built within Microsoft Dynamics 2013, back in October 2013. Phase 1 of this build was to install MS Dynamics and configure CRM so it could take lead information from the Investors in People website and assign these leads to our seven Delivery Partners based on region. We also installed ‘Click Dimensions’ as an automated marketing platform, using the information within Dynamics, to capture and score leads.

Phase 2 of the build was focused around building integration with our seven delivery partners, who all use their own systems in order to store account information on whether a client is accredited or working with Investors in People.

Phase 3 of the build brought our Northern Ireland and International Delivery Partners onto using the national CRM rather than using their own systems.

Phase 4 of the build helped support the development of the new processes and functionality to support the launch of the refreshed framework of Investors in People, released in 2015.

In addition to MS Dynamics 2013, we use a system call SCRIBE which acts as middleware between our CRM and the Delivery Partner systems. A custom developed API (managed by our incumbent web supplier and incumbent CRM supplier, built with .NET) also acts as the middleware between the current Investors in People website and the national CRM system.

This Invitation to Tender (ITT) sets out our requirements for further developing the CRM system, the customer journey and increasing integration with our website

# specification and requirements

Our current supplier has delivered all CRM development in 15/16. Any new organisation would require a familiarisation/onboarding period.

Our requirements for Phase 5 of the CRM build are focussed around the following:

### Continued Development of CRM for the new Framework

The Investors in People framework is our core product. All accredited organisations are assessed against the framework and the associated assessment ‘journey’. The new standard has now been live for the better part of a year; IIP accredited organisations and new IIP customers are beginning to migrate from version five to version six of The Standard or be newly assessed against version six.

Development carried out within this phase must take into account our objective of moving towards a Centralised CRM. As a result, we have 7 end user delivery partners and our supplier will need to work with both IIP National and our Delivery Partners in order to ensure the build is fit for purpose. IIP National will be the primary client and will take the lead in co-ordinating the involvement of Delivery Partners.

 **Continued Integration between National CRM and IIP Website**

As part of the new framework, there is an evolving requirement to pass information to and from our website, [www.investorsinpeople.com](http://www.investorsinpeople.com) and the CRM. The method of information transfer has been developed via a web service. The successful bidder will be responsible for the continued development of the existing web service for any new exposure of fields or entities from CRM, or responsive builds of new submit methods for form captures on the Investors in People website. Any successful bidder would be expected to work to specs produced based on user stories and develop and test in line with the sprints agreed with our web development team on this workstream.

### Data fixing/Operational Stability Investigation

The large amounts of data that are transferred daily between delivery partners and our systems is mostly handled by Scribe, but significant amounts of data are also generated by tools such as ClickDimensions. Sometimes data integration issues are spotted that require new functionality to be built in Scribe to support correct data. In other rare cases, expertise in Scribe may be required to apply system rules to update data en masse in CRM. We require the successful bidder to address all issues re operational stability not covered by our existing support arrangement, which covers bug fixing and support for live code.

## Key deliverables/outputs

This phase of development is focused on continuing development based on the foundation laid by previous phases, to provide a strong user experience in relation to the success of the new framework and the associated customer journey. Successful bidders would be responsible for the following outputs:

1. **Customisation/Development of CRM**
	* Amendment of the customer journey within CRM in accordance with continuing changes being made as part of the new framework/assessment process and in line with reviewed definitions
	* Development of automations under the existing developed automation framework for the different project types we run on both version five and version six of The Standard – the majority of the existing automations are developed in a framework using .NET but supported by data on ‘automation’ records in CRM and CRM workflows.
		+ This may include but is not limited to maturing or developing processes for:
			1. Staged Reviews
			2. Internal Reviews
			3. Advisories, Diagnostics and Workshops
			4. De-accreditations (and those companies we are no longer working with)
	* Creation of new screens within CRM that take the end user through the process in stages, depending on where the organisation is within the customer journey
		+ This may include but is not limited to development or modification of business process flows or new entities linked to existing core entities, where expertise or resource is beyond our internal capacity. For example, as part of developing our reporting capability on workshops we may seek to create a new entity for ‘homework’ records and link that to our project entity which runs all our project types, dependent on solutions advice.
	* Support in change management (and deployment) of releases (basic additions such as new processes, additional or removed fields) configured by internal IIP staff to ensure parity between production, User Acceptance and Development environments. Such methods are designed both as cost saving measures for Investors in People but also to allow the maximum possible flexibility for simple but often valuable change.
	* Changes to user interfaces such as the site map in CRM e.g:
		+ Remove buttons, rearrange them, add buttons, either by using a sitemap editor tool or directly editing the XML.
	* Minor usability or date calculation improvements typically using JavaScript. In some cases, these scripts may be supplied to you by Investors in People for deployment when internal resource is insufficient.

Developments would largely revolve around technical advice on existing functions, including out of the box customisations (including processes) and any dependencies they may have on code or other functions. There would also be continued development and expansion of our complex automations framework (largely built in .NET) which reduces user data entry significantly and supports many of our business rules and processes. It is expected that UKCES (IIP) internal staff will develop most of the more basic customisations (such as new fields, rearranged layouts on forms etc). The successful supplier will therefore need to demonstrate their ability to provide effective change management and ensure strong communication with the internal team and this should be considered in any estimate of project management time.

All source code that is updated or developed as part of these works should be uploaded as a copy into a github repository that we use for IIPs technical documentation purposes. It is a requirement that all source code developed for the CRM will be owned by IIP.

1. **Continued integration of CRM and the IIP website.**

The successful supplier will need to work closely with our web developers and the internal IIP team, who use a SCRUM approach.

The typical data to be transferred may include but is not limited to:

* Lead/Marketing information between the CRM and the Website
	+ Often the website is the first port of call for new clients interested in learning more about Investors in People. The Marketing team at Investors in People are constantly looking at new ways to improve this and there is likely to be further two-way integration work in relation to the better capture and management of leads.
* Expose of fields in CRM to the existing web service
	+ As online product development requirements evolve and mature around benchmarking needs or data collection, new sets of data need to be made available on the web service. It is likely this would be achieved by utilising the existing API, but the design of new APIs to support product and platform solutions may also be in scope. Online product developments will be led and managed by the IIP Product Team and web vendor.
1. **Data Fixing**
	* Updates and additions to Scribe data integrations where not covered by existing support arrangements.
	* This may include but is not limited to new fields created as the new journey matures and the need to form/coordinate these mappings with our delivery partners to improve overall reporting and data integrity.
* Methods to stabilise or improve performance on our SQL server/CRM e.g.
	+ Pinpointing expensive queries, code or processes that could be made more efficient or deactivated
	+ Applying Microsoft best practices/white papers for CRM and SQL Server
1. **Specifications/Documentation**
	* Where appropriate, especially when working in collaboration with our web vendor on API integration.
	* Documentation should be clear, concise and accurate for user stories with technical implementation detail

Given the aim for agile delivery of the deliverables above, can you please indicate how you would approach this and what you would need from us up front in order to bring you up to speed as quickly as possible.

# cONTRACT AND TENDER PERIODS

You agree that the contents of the tender will remain valid for a period of 6 months from the closing date for submission of the tender.

# About the supplier

The current supplier has delivered all CRM development in 15/16 and an on-boarding period would be required for any new supplier.

**Agile development**

The supplier will respond at pace to the demands of our customers, will test hypotheses, and will create minimum viable products ready for live testing and feedback using an agile approach.

Your proposal will include details of the team you will provide and their experience in full-service CRM design and development. Suppliers will demonstrate a sound understanding and examples of developing quality, responsive CRM systems.

**Ways of working**

The successful supplier will work as an extension to the core team within Investors in People, who are responsible for creating and developing new and enhanced functionality, testing and optimising our CRM, with the primary objective of delivering fantastic user experience for our customers who use CRM daily. The supplier will also be able to work well with our current web vendor, who works in sprints.

The way we work has historically been aligned more with a waterfall methodology – this tender supports a wider shift in business strategy towards a much faster turnaround in small minimum viable product functionality that is requested regularly by our users and stakeholders. Suppliers should be wholly familiar with the methodology of agile software development and will work with the IIP Product team as a cross-functional, self-organising team. The team will be prepared to work according to SCRUM, and the supplier is expected to fulfil the ScrumMaster role, working closely with the Product Owners within Investors in People to understand the vision and priorities and effectively support the Development Team to achieve objectives.

Work is scoped in user stories, and delivered according to agreed acceptance criteria. A schedule of back-to-back sprints (tentatively scheduled as two weeks per sprint) will be agreed upon supplier award. Open communication and collaboration within such timeframes is therefore key. Weekly meetings, sprint planning sessions and, in busy or crunch periods, daily standups are to be expected and should be considered in respect to the amount project management effort of the vendor to support this.

Due to the agile nature of this contract we seek weekly or fortnightly reports on resource usage and what has been delivered against a user story. Resource used against any particular sprint would be covered as part of a sprint planning session. We use Pivotal Tracker as a project management tool for this purpose and any successful supplier would be given access.

Given the nature of this approach to working, we would like to purchase call-off days to support the continued improvement of the system and our ability to plan sprints in an agile manner. This will require at least one developer/consultant day per week plus a smaller (15-30% or less) effort for project management. Please submit a rate card for how much it would cost per day for such work.

As part of our intended development, the supplier will also need to be proficient in the following:

- Responsive design and development

- Complex systems third party integration, including Drupal, Scribe

- Extensive experience in development across multiple languages and platforms, in particular the Microsoft CRM Development Stack: REST, SQL, JavaScript, .NET

The supplier will also be a recognised and active member of the Microsoft community.

**System Support**

##### We currently have a support contract for maintaining the system and fixing bugs which runs to January 2017. The successful supplier will be required to coordinate with the Support Contractor where appropriate.

# budget

There is a maximum budget of £60,000 ex VAT to cover delivery to end of March 2017.

As per the timetable below, inception is planned for September. With approximately 26 weeks of our financial year remaining, it is expected that this should easily cover a single full time developer/consultant and 15-30% project management effort for one day a week dependent on quoted day/market rates.

The estimate of one day per week consultant/developer time plus project management effort is to assist both parties to understand and deliver the required resource. However, it is also expected that with appropriate forward notice, both IIP and the successful supplier will be able to provide additional resources where workload increases or reduces (e.g. Christmas).

# TIMETABLE

The following timetable will apply for this tender

|  |  |
| --- | --- |
| **Activity** | **Planned Completion**  |
| Invitation to tender (ITT) sent out | 19 August 2016 |
| Closing date for questions on the ITT | 1000, 25 August 2016  |
| Closing date for response to questions to be published | 1600, 25 August 2016 |
| **Closing date for submission of tenders**  | **Noon, 05 September 2016**  |
| Shortlisting | 5 to 7 September 2016 |
| Shortlisted tenderers invited for interview | 7 September 2016 |
| Unsuccessful tenderers notified via e-mail  | 7 September 2016 |
| UK Commission Panel interviews | 13-14 September 2016 |
| Award made & unsuccessful interviewees notified | 14 September 2016 |
| Inception meeting | 19 September 2016 |
| **Commencement of delivery** | 19 September 2016 |
| **Completion of delivery** | **31 March 2017 or when £60,000 is reached** |

In the event that contractual terms cannot be finalised with the Tenderer selected, the UK Commission reserves the right to select an alternative.

##### format of tenders and guidance on content

##### please prepare your tender following the format of sections below.

# TABLE OF CONTENTS

You will produce an index to aid navigation through the tender document. The table of contents will refer to the following sections and sub-sections and the main tender document will address all of the points required below.

# MANAGEMENT SUMMARY

You will produce an overall statement, of approximately 1 page, which concisely brings together all of the key points made throughout the detailed tender documentation.

# Basic details of your organisation

*Please complete this section and include it within your tender.*

|  |  |
| --- | --- |
| Company Name |  |
| Address  |  |
| Post Code |  | Website  |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | Contact 1 | Contact 2 | Contact 3 |
| Contact Name / Job Title |  |  |  |
| Contact Telephone |  |  |  |
| Contact e-mail |  |  |  |

Please put an ***x*** against one box in each section that most closely describes your organisation.

|  |  |  |
| --- | --- | --- |
| **Supplier Type** |  | **Company Status** |
| Sector Skills Council |  | Government Statutory Body |  |
| Standard Setting Body |  | Limited by Guarantee Charity |  |
| Supplier |  | Limited Guarantee Non-charity |  |
| **Company Size** | Limited Liability Partner |  |
| Small - Up to 50 Employees and less than £5.6m turnover |  | Partnership |  |
| Public Limited Company  |  |
| Medium - 51 to 250 Employees and less than £22.8m turnover |  | Private Limited by Shares |  |
| Sole Trader |  |
| Large - Over 250 Employees |  | University |  |

|  |  |  |
| --- | --- | --- |
| **VAT Registration Number** | **Company Registration No.** | **Charity Number** |
|  |  |  |
| **Date of Registration** | **Date of Registration** | **Date of Registration** |
|  |  |  |

Bank Details

|  |  |
| --- | --- |
| Bank Name |  |
| Contact Name |  |
| Branch Address |  |
| Post Code |  |

Ultimate Parent Company (if applicable)

|  |  |
| --- | --- |
| Name |  |
| Address  |  |
| Post Code |  | Website  |  |

# financial and commercial Criteria (Pass or Fail)

*Please complete this section and include it within your tender.*

|  |  |
| --- | --- |
| How many years have you been trading? |   |
| What was your actual turnover in the last 2 financial years? | y/eturnover | y/eturnover |
| What was your actual trading result in the last 2 financial years? (profit/loss) | y/eprofit/loss | y/eprofit/loss |
| What were your balance sheet total reserves in the last 2 financial years? | y/eReserves | y/eReserves |
| If asked would you be able to provide at least one of the following: |
| A copy of your most recent audited accounts. | **Yes / No** |
| A statement of your turnover, profit and loss account and cash flow for the current year of trading. | **Yes / No** |
| During the last financial year which single organisation or group was your primary customer?What percentage of your annual turnover did this customer account for? | Name:%: |
| Has your organisation met the terms of its banking facilities and loan agreements (if any) during the past 12 months? | **Yes****No****No such terms** |
| If ”**No**” what were the reasons and what has been done to put things right? |
| Has your organisation met all its obligations to pay its creditors and staff during the past 12 months? | **Yes / No** |
| If ”**No**” what were the reasons and what has been done to put things right? |
| Are you currently involved in any legal disputes or are any pending?Have you had any judgements against you for which reparation, compensation or costs are still outstanding? | **Yes / No****Yes / No** |
| If ”**Yes**” give brief details – sufficient not to prejudice the legal process. |

Please record the value of insurance cover for current policies where payments are up to date.

|  |  |
| --- | --- |
| Value of Employers Liability insurance cover |  |
| Value of Public Liability insurance cover |  |
| Value of Professional Indemnity insurance cover |  |
| Value of other cover. Please provide details |  |

# MEETING THE SPECIFICATION

You will produce a comprehensive but concise document that demonstrates how you will be able to fulfil the requirements of the specification. In particular, the tender will be evaluated with due regard to the following sub-sections. Please note that the order in which the evaluation criteria are listed does not imply relative importance.

## policies and procedures criteria (5% of the total score)

*Please complete this section and include it within your tender*

|  |  |  |
| --- | --- | --- |
| Criteria |  | Marks available |
| Does your organisation operate health and safety at work systems and procedures? | **Yes / No** | 1 |
| Does your organisation have a written equal opportunities and diversity policy that is communicated to your staff? | **Yes/No** | 1 |
| Does your organisation operate environmental management systems and procedures? | **Yes / No** | 1 |
| Does your organisation operate risk management systems and procedures? | **Yes / No** | 1 |
| Does your organisation hold a recognised quality management certificate for example BS/EN/ISO 9000 or equivalent? If not do you have quality assurance systems or procedures in place? | **Yes / No** | 1 |
| Does your organisation have Investors in People (IiP) accreditation? | **Yes / No** | 3 |
| Does your organisation have a policy on training or workforce development? | **Yes / No** | 1 |
| What is your organisation’s staff turnover? | 0-10%10-20%Over 20% | 1 |
| If you have answered “**No**” to any of the above, can you describe for each “**No**” response how you manage your organisation and staff in the absence of the policy, system or procedure? |

## capability criteria (65% of the total score)

*The format of your response is at your discretion, but will cover the following.*

|  |  |
| --- | --- |
| **Capability Criteria** | **Available** |
| Demonstrate a solid understanding of the IIP business and vision, along with a clear grasp of the project’s objectives. | **5** |
| Provide examples of successful implementation and customisation of:* MS Dynamics CRM 2013 (Including .NET and Javascript) – 25%
* SCRIBE – 10%

This should include details of work allowing upload of data and documents including case studies. | **35** |
| Evidence experience of implementing technical solutions linking website data & documents into CRM systems and vice versa | **10** |
| Provide details of the experience and capability of the named individual(s) who will lead and deliver the project of this tender. This will include details of how they will approach working with other suppliers and internal teams to deliver an effective solution | **15** |
| Proven framework/strategy for change management in fast changing environments | **10** |
| Evidence of the team’s previous ‘agile’ project delivery. An evidenced application of the SCRUM framework, with ScrumMaster responsibilities (for the named individual). Additional experience of good project management, including work prioritisation, budget management & resource allocation. Evidence of ability to work openly and collaboratively, with a proposal of how you would approach working with the IIP team and web developer, | **15** |
| Evidence of the team’s ability to provide clear, concise and accurate documentation for user stories with technical implementation detail, and guidance for internal management of functionality | **10** |

**A minimum score of 65% of the marks available** in the Capability section must be achieved in order for your tender to continue to be considered.

## Price (30% of the total score)

Given your approach as detailed above, please give indicative costs & number of days/team members allocated to delivery of each element within the Key Deliverable/Outputs detailed on page 4 of this Invitation to Tender document and include any time required to review the CRM system to get up to speed. Please indicate length of working day.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity | Team member | Day rate (ex VAT) | No. of days | Total ex VAT |
| System review and handover from incumbent supplier |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## references

These references must be external to the UK Commission. Please provide details of three recent contracts that are relevant to the UK Commission’s requirement. Where possible at least one should be from the public sector. If you cannot provide three references, please explain why.

|  |  |  |  |
| --- | --- | --- | --- |
|  | Reference 1 | Reference 2 | Reference 3 |
| Customer Organisation: |  |  |  |
| Customer Contact Name and Phone Number: |  |  |  |
| Date Contract Awarded: |  |  |  |
| Contract reference & brief description: |  |  |  |
| Value: |  |  |  |
| Date contract was completed: |  |  |  |
| Have you had any contracts terminated for poor performance in the last three years, or any contracts where damages have been claimed by the contracting authority?If **YES** give details – please ensure that the details given do not prejudice any on-going court cases. | **Yes / No** |

# DECLARATIONS

*Please complete this section and include it within your tender. Unsigned declarations submitted with tender documents will be regarded as a non-compliant application.*

I acknowledge that the standard contractual terms and conditions of the UK Commission will form the basis of any contract between the parties resulting from this invitation to tender;

##### IMPORTANT YOU MUST COMPLETE THIS SECTION FOR youR APPLICATION TO BE VALID. THIS IS A LEGALly binding DECLARATION.

I declare on my honour that, (any of) the director(s) / officer(s) / partner(s) / proprietor(s) of the organisation, are not currently in, or previously have been in any of the following situations:

* declared bankrupt, been or are being wound up or having any affairs administered by the courts. Entered into an arrangement with creditors, or have suspended business activities. Been or are the subject of proceedings concerning any such matters and in any similar situation arising from a similar procedure provided for in legislation or regulations;
* been convicted of any offence concerning professional judgement by a judgement which has the force of res judicata[[1]](#footnote-1),
* been found guilty of any grave professional misconduct proven by any means which the contracting authority can justify;
* failed to fulfil obligations relating to payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country where established or with those of the country or the contracting authority or those of the country where the contract is to be performed;
* been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity;
* been declared to be in serious breach of contract for failure to comply with contractual obligations.

Any of the events above would exclude us from participating in this procurement

application.

In addition, the undersigned declares on their honour:

* that on the date of submission of the tender, the company or organisation I represent and the staff proposed for this tender are not subject to conflicts of interests in the context of this invitation to tender; I undertake to inform the UK Commission without delay of any change to this situation after the date of submission of the tender.
* that the information provided to the UK Commission within the context of this invitation to tender is accurate, sincere and complete.
* that the amount or appropriate amount of the tender price has not been communicated to any other party, other than in confidence and for the express purpose of obtaining insurances or a bond in connection with this tender;
* the tender has not been fixed nor adjusted in collusion with any interested party;
* the tender will remain valid for 6 months after the closing date of the tender;

|  |  |
| --- | --- |
| Name | Title |
| Signature | Date |

**Notes on the Government’s Transparency Agenda**

From January 2011 the UK Commission will be required by Cabinet Office to publish all contracts issued on ContractsFinder website.

As part of this process we are able to redact (edit for publication) any information in the contract which is considered to be commercially sensitive, e.g. names and telephone numbers of Project Managers. Contracts will normally not be prepared using Day Rate values; however the financial details which form part of Schedule 1 Annex 1 must be shown and cannot be redacted.

Should you be successful in winning this contract and you think that there would be anything in the contract that you feel would be commercially sensitive and you would prefer to be redacted, please state it in the box below. Items stated in the box below will be considered and will not prejudice your bid for this work, but will require adequate justification to support your reasons for redaction.

|  |  |
| --- | --- |
| Commercially Sensitive Item | Justification for Redaction |
|  |  |

|  |  |
| --- | --- |
| Name | Title |
| Signature | Date |

1. res judicata – a matter already settled in court; cannot be raised again. [↑](#footnote-ref-1)