

## Invitation to Tender (ITT)

### Brief for the Design and Implementation of a Facilities Management System for the Historic Ships Department, The National Museum of the Royal Navy

First Issued: 14/12/2018

## 1. Summary Instructions and Details of Contract

SUBJECT	DETAILS
<b>Contract Description</b>	A contract for the design, implementation and ongoing support for an FM system for the Historic Ships department at the National Museum of the Royal Navy (NMRN)
<b>NMRN Contact during tender period</b>	Clarifications and enquiries during the tender process can be sent to <a href="mailto:HST.procurement@nmrn.org.uk">HST.procurement@nmrn.org.uk</a> . <b>Please note that this email address is different to the submission email.</b>
<b>Date of Tender Return</b>	14/01/2019 Tender's must be submitted to <a href="mailto:tenders@nmrn.org.uk">tenders@nmrn.org.uk</a>
<b>Content for Submission</b>	Content requirements for tender returns are listed in Annex 2 of this ITT.
<b>Last date for Clarifications</b>	04/01/2019
<b>Annexes</b>	<b>Annex 1 – Tender Specification</b> <b>Annex 2 – Supplier Response</b> <b>Annex 3 – Pricing Approach</b> <b>Annex 4 – Evaluation Criteria &amp; Approach</b> <b>Annex 5 – Historic Ships Structure</b> <b>Annex 6 – Current Example of our PCS</b> <b>Annex 7 - Terms and Conditions of Contract</b> <b>Annex 8 - NMRN's GDPR Privacy Policy</b>

## 2. Company Overview

- 2.1. The National Museum of the Royal Navy tells the story of the Royal Navy and its impact in shaping the modern world. A unique feature of the Museum is its collection of historic warships, believed to be the largest fleet of its kind in the world. Located throughout the United Kingdom, the fleet consists of ships such as HMS Victory and HMS Warrior in Portsmouth, HMS Alliance and Holland 1 submarine in Gosport, HMS Trincomalee in Hartlepool and HMS Caroline in Belfast.

## 3. Project Introduction

- 3.1. The team has grown from one individual in 2015, where all maintenance was contracted out, to a team of 29 in-house specialists by the end of 2018. This team consists of curators, traditional shipwrights, traditional riggers, curators, project managers, electricians, shipkeepers, painters, archaeologists and a data manager.
- 3.2. Most of the team are based at the NMRN Portsmouth Headquarters, with a small contingent in Belfast and Hartlepool. The team coordinate their time to conduct work at all of the NMRN sites during the year. This work consists of a planned annual maintenance schedule for each ship, and their associated workshops, together with stand alone projects which are not part of the usual maintenance regime and have a set start and end date, usually within each financial year.
- 3.3. The team and the fleet have grown to the point where the previous ways of working are no longer efficient or practical. We are looking to procure a facilities management system to improve our planned maintenance regime.
- 3.4. Currently there is no FM software in place. The team work from Microsoft spreadsheets and documents for planning, executing and reporting on planned maintenance.
- 3.5. For further information on the structure of the Historic Ships team please see Annex 5.

## 4. Tender Process (“Procurement Process”)

### 4.1 Applying before the Submission Deadline

#### 4.1.1 Work Specification

The NMRN wishes to appoint a supplier to design, implement and support a new facilities management system for the Historic Ships department at the NMRN. This FM system is specifically targeted at our planned maintenance regime.

For a full, detailed specification of the services required refer to Annex 1.

#### 4.1.2. Consultations & Site Visits

Consultations and site visits are available for contractors before tender submission. Please contact [HST.Procurement@NMRN.org.uk](mailto:HST.Procurement@NMRN.org.uk) to arrange.

#### 4.1.3 Timescales

Subject to any changes notified to potential suppliers by the NMRN in accordance with the Tender Conditions, the following timescales shall apply to this Procurement Process:

Activity	Date / time
Issue of Contract Notice / availability of ITT documents	14/12/2018
Deadline for clarification questions (Clarification Deadline)	04/01/2019
Deadline for submission of ITT responses by potential suppliers (Tender Response Deadline)	14/01/2019
Interview/Demonstration	23/01/2019
Award decision standstill letters issued	24/01/2019
Contract start date	04/02/2019
Contract end date	31/03/2020

#### 4.2. Instructions for Submitting Tenders

4.2.1 The documents that must be submitted to form your tender response are listed in Annex 2 (Supplier Response) to this ITT.

4.2.2 Tender submissions must be sent to [tenders@nmrn.org.uk](mailto:tenders@nmrn.org.uk) before the submission deadline.

4.2.3 The following requirements should be complied with when submitting your response to this ITT:

- Please ensure that you send your submission in good time to prevent issues with technology – late tender responses may be rejected by the NMRN.
- Please ensure that information provided as part of your response is of sufficient quality and detail that an informed assessment of it can be made by the NMRN.
- Do not submit any additional supporting documentation with your ITT response except where specifically requested to do so as part of this ITT. PDF, JPG, PPT, Word and Excel formats can be used for any additional supporting documentation (other formats should not be used without the prior written approval of the NMRN).
- All attachments/supporting documentation should be provided separately to your main tender response and clearly labelled to make it clear as to which part of your tender response it relates.
- If you submit a generic policy / document you must indicate the page and paragraph reference that is relevant to a particular part of your tender response.
- Unless otherwise stated as part of this ITT or its Annexes, all tender responses should be in the format of the relevant NMRN requirement with your response to that requirement inserted underneath.
- Where supporting evidence is requested as 'or equivalent' – you must demonstrate such equivalence as part of your tender response.

- Any deliberate alteration of an NMRN requirement as part of your tender response will invalidate your tender response to that requirement and for evaluation purposes you shall be deemed not to have responded to that particular requirement.
- Responses should be concise, unambiguous, and should directly address the requirement stated.
- Your tender responses to the tender requirements and pricing will be incorporated into the Contract, as appropriate.

#### **4.3. Clarification Requests**

4.3.1 All clarification requests should be submitted to [HST.Procurement@NMRN.org.uk](mailto:HST.Procurement@NMRN.org.uk) by the Clarification Deadline, as set out in the Timescales section of this ITT. The NMRN is under no obligation to respond to clarification requests received after the Clarification Deadline.

4.3.2 Any clarification requests should clearly reference the appropriate paragraph in the ITT documentation and, to the extent possible, should be aggregated rather than sent individually.

4.3.3 The NMRN reserves the right to issue any clarification request made by you, and the response, to all potential suppliers unless you expressly require it to be kept confidential at the time the request is made. If the NMRN considers the contents of the request not to be confidential, it will inform you and you will have the opportunity to withdraw the clarification query prior to the NMRN responding to all potential suppliers.

4.3.4 The NMRN may at any time request further information from potential suppliers to verify or clarify any aspects of their tender response or other information they may have provided. Should you not provide supplementary information or clarifications to the NMRN by any deadline notified to you, your tender response may be rejected in full and you may be disqualified from this Procurement Process.

## Annex 1 - Tender Specification

### 1. Aims

1.1. To procure this new system the NMRN want to be driven by an understanding on the outcomes. Below are 9 aims which the historic ships team want to achieve with help from the new FM system.

- **Aim 1:** Reduce the amount of time it takes preparing for and coordinating the in-house team and external contractor tasks in the planned annual maintenance of each ship, freeing up the team to focus on the more complex stand-alone project work.
- **Aim 2:** Improve our understanding of how we work so we can become more efficient with time and money
- **Aim 3:** Reduce the amount of time it takes to gather useful data, write and send reports on work progress per month and per year.
- **Aim 4:** Reduce the amount of time it takes to find and generate important annual maintenance and H&S information for each of the ships. Ideally reducing the amount of paper used.
- **Aim 5:** Improve consistency of documentation, costs and maintenance regimes for each of our ships and workshops, reducing the chance of unforeseen errors or gaps within the maintenance regimes.
- **Aim 6:** Improve access to information so team members can access information and tasks away from their desks, even when offline inside the vessels.
- **Aim 7:** Speed up how we do procurement by sharing information on contractors, their costs and when their contractors require renewal whilst complying with GDPR legislation.
- **Aim 8:** Improve how we do our financial monitoring and planning by simplifying our finance processes.
- **Aim 9:** Improve our understanding of stock levels and reduce delay to work by identifying necessary stock for planned maintenance is available.

### 2. Statement of Requirements

In order to achieve the aims, the NMRN recommends the below features for the system. This has been split between essential features and desirable features.

Ref	General Requirement	Essential/ Desirable	Detail
1	Scheduling for planned maintenance.	Essential	<ul style="list-style-type: none"> <li>• Scheduling for internal staff and external contractors</li> <li>• Automated reminders &amp; alerts</li> <li>• Work orders with check list</li> <li>• Tick off each task complete</li> </ul>
2	Inventory & locations	Essential	<ul style="list-style-type: none"> <li>• Inventory of items requiring surveying for each ship and each workshop</li> </ul>
3	Procurement	Essential	<ul style="list-style-type: none"> <li>• Store information on contractors, their costs and past/live contracts.</li> <li>• Renewal alerts for contracts</li> <li>• Compliance with GDPR</li> </ul>
4	Health & Safety	Essential	<ul style="list-style-type: none"> <li>• Emergency contact information</li> <li>• All H&amp;S documentation relevant for inhouse or external contractor (RAMS, asbestos and fire</li> </ul>



			management, GDPR, exclusion zones)
5	Reporting	Essential	<ul style="list-style-type: none"> <li>Daily, weekly, monthly, quarterly and annual reporting of financial information, stock, man-hours and travel time</li> <li>Defects reporting</li> </ul>
6	Cloud-based	Essential	
7	Accessible on Desktop, Laptop, Tablet and Mobile.	Essential	<ul style="list-style-type: none"> <li>Access information and note updates/task complete whilst the system is offline/out of signal</li> </ul>
8	Storage	Essential	<ul style="list-style-type: none"> <li>External storage of data to the NMRN's storage systems</li> </ul>
9	Compatible with essential software	Essential	<ul style="list-style-type: none"> <li>Compatible with MS Office, PDF and AutoCAD</li> </ul>
10	Compatible with other NMRN software	Desirable	<ul style="list-style-type: none"> <li>PSF Live finance system, Galaxy CRM, CIPHR.</li> </ul>
11	Financial	Desirable	<ul style="list-style-type: none"> <li>Record of financial information connected to internal and external workforce.</li> </ul>
12	Stock Management	Desirable	<ul style="list-style-type: none"> <li>Record of all equipment, their allocated budgets and their costs available at the different NMRN sites</li> <li>Alerts when stock is now and in need of order before tasks are due.</li> </ul>

### 3. Deliverables

The NMRN require the supplier to provide the following as part of this contract:

#### Part 1: Design, Implementation, Training & Handover

The supplier is required to:

1. Design the system to suit the historic ships department at the NMRN.
2. Implementation of the system
3. Training of the Historic Ships team to use the software, together with an in-depth training of two individuals within the Historic Ships team to ensure suitable trouble-shooting can be dealt with to a sufficient level in-house (see Annex 5).
4. Handover of the system to the NMRN on completion of implementation.

#### Part 2: Contract

5. Annual contract which includes consultant support to the Historic Ships team at the NMRN per month.

### 4. Additional Considerations

#### Timeframe

The supplier must aim to complete implementation by the end of the NMRN's current 2018/2019 financial year, ending on the **31<sup>st</sup> March 2019**.

If the supplier cannot provide the system fully by the 31<sup>st</sup> march 2019 deadline, the NMRN welcomes the supplier to provide a phased approach, whereby the initial structure and information is established before the 31<sup>st</sup> march 2019, with the following financial year seeing the NMRN and/or the supplier populate the system on a roll on basis.

### **Handover**

Before the system is handed over to the client, the supplier is required to provide a demonstration of the system to the NMRN for initial testing and feedback.

After this initial demonstration the supplier is required to undertake the necessary changes without incurring further costs not included within the Purchase Order to the NMRN.



## Annex 2 – Supplier Response

### Scenarios

As part of the tender process, the NMRN wish to understand a number of scenarios to ensure that the tender provides the flexibility required for the budget and also the timeframe.

The supplier is invited to provide two costs and a timeframe for:

- a) the essential features only, and
- b) a breakdown of time and cost for adding each of the “desirable” features from the specification. The NMRN wish to understand a clear ‘upgrade’ path.

The supplier is also invited to provide costs which involve two methods for populating the system if populating the system cannot be achieved by the 31<sup>st</sup> March 2019, one by:

- a) the client over the 2019/20 FY, and one by
- b) the supplier from April 2019

### Part 1: Checklist

Below is a checklist of the desired content of the tender response to this ITT, in reference to the Specification in Annex 1:

Ref	Content	Ref	Detail
<b>1</b>	<b>Qualifications &amp; Experience</b>	1.1	The professional skills and qualifications of people involved in the project, including the names and CV's of proposed team members, their specific responsibilities and any arrangements for subcontracting.
		1.2	Provide 3 examples of similar software projects you have done in the last 3 years. If possible, we advise you to provide at least one example demonstrating a short time period for implementation
		1.3	Explanation on how the software system will help the NMRN achieve the 9 aims set forward in the above scope.
		1.4	Explanation on how the software can be structured to fit with a historic ship.
		1.5	Explain the future aims the supplier has for the software over the next 3 years, detailing what improvements are planned for the software.
<b>2</b>	<b>Methods</b>	2.1	Specify how the potential supplier will go about planning and executing the Deliverables of Part 1 and Part 2 taking into account the different scenarios in cost and timeframe set out in Annex 2's scenarios above.
		2.2	Part 1: Design process

		2.3	Part 1: Implementation of the system (before March 2019) and, if full implementation is not possible by the end of March 2019, a method stating how the population of the system is done by a) the supplier or by b) the client.
		2.4	Part 1: Training of the historic ships team, including advanced training for two Historic Ships staff
		2.5	Part 1: Assessment & handover
		2.6	Part 2: Annual contract for the NMRN, involving remote and on-site consultant support, and hourly development rates. Include details on your required response rate to enquiries and support.  Please ensure you provide a draft service level agreement for review by the NMRN
		2.7	Part 2: Set out how the system is updated on a regular basis and if there are any charges or time incurred by the client.
5	<b>Scheduled Work Programme</b>	5.1	Scheduled work programme (in days) for all stages of the work with milestones and dates. Please provide information on the varying scenarios for time and cost (eg. Essential features, desirable features, client population, supplier population)
6	<b>Finance (see Annex 3 for Pricing Approach)</b>	6.1	A lump sum cost for Part 1 and Part 2, including any travel, subsistence and accommodation (Exc. VAT). Include the different cost and schedule scenarios.
		6.2	Schedule of hourly rates and travel, subsistence & accommodation for the proposed labour in Part 1, including sub-contractors.
		6.3	Schedule of hourly rates and travel, subsistence & accommodation for the proposed labour in Part 2, including sub-contractors.
		6.4	Provide a statement of the organisation's turnover that relates directly to the supply of this service for the past three years or for the period the organisation has been trading.
7	<b>Insurance</b>	7.1	Full extent of professional insurance or indemnity cover
8	<b>Security</b>	8.1	Explain the security measures for the software, giving any record of breaches to the system in the last 3 years and the actions taken to mitigate this risk.
9	<b>Termination</b>	9.1	Explain the methods, timeframes and costs involved with terminating a contract or not renewing a contract with the supplier, specifying the T&Cs and data release.

## Part 2: Confidential/Commercially Sensitive Document Template

Below is a recommended template to allow potential suppliers to indicate any confidential/commercially sensitive information in accordance with the requirements of the Confidentiality and Information Governance section of this ITT.

Specify the precise elements which are considered confidential and/or commercially sensitive
Why do you consider an exemption under the POIA or EIR would apply?
Specify the estimated length of time during which the exemption will apply

### Annex 3 – Pricing Approach

The following sets out information and a recommended template for the content and format of the pricing proposals for a bid.

#### Information

All pricing should be in Pound Sterling (GBP) and Exclusive of VAT.

As part of this ITT the NMRN require three types of pricing proposals;

- 1) A full lump sum cost exclusive of VAT and including travel, subsistence and accommodation.
- 2) A breakdown of costs for the works specified within this ITT (see Annex 1)
- 3) A breakdown of hourly costs for the supplier and any subcontractors, including any travel, subsistence and accommodation.

#### Template

1) A breakdown of costs for the works specified within this ITT

The following is a template for the fee proposal breakdown. It is recommended that this breakdown should include reference the scheduled works programme, bringing in milestones and dates. Please note this template is a guidance document and therefore is not all encompassing. Stages and Tasks can be added or removed by tenderers where seen fit:

Item	Description	Staff Member	Days	Cost (£) (Lump Sum)	Program & Milestone
<b>1</b>	Stage 1				
<b>1.1</b>			0.25	£X	Week commencing (w/c)
<b>1.2</b>			-		w/c -
<b>2</b>	Stage 2				
<b>2.1</b>					w/c
<b>2.2</b>					
<b>2.3</b>					
	<i>Half-way stage invoice</i>				
<b>3</b>	Stage 3				
<b>3.1</b>					w/c
<b>3.2</b>					
<b>4</b>	Stage 4				
<b>4.1</b>					
<b>4.2</b>					
<b>5</b>	Stage 5				
<b>5.1</b>					
	<i>Final invoice</i>				
<b>TOTAL LUMP SUM (EXC. VAT)</b>			<b>X Days</b>	<b>£X</b>	<b>w/c – w/end</b>

2) A breakdown of hourly costs for the supplier and any subcontractors, including travel, subsistence and accommodation.

Below is a desired template of daily rate costs from the supplier and their sub-contractors:

Staff Member	Daily Rate (£)	Travel (per	Accommodation	Subsistence
--------------	----------------	-------------	---------------	-------------

		day or per visit) (£)	(per night) (£)	(per day) (£)
	£X	£X	£X	£X
	£X	£X	£X	£X
	£X	£X	£X	£X

## Annex 4 – Evaluation Criteria & Approach

1. You will have your tender response evaluated as set out below:

**Stage 1:** Tender responses will be checked to ensure that they have been completed correctly and all necessary information has been provided. Tender responses correctly completed with all relevant information being provided will proceed to Stage 2. Any tender responses not correctly completed in accordance with the requirements of this ITT and/or containing omissions may be rejected at this point. Where a tender response is rejected at this point it will automatically be disqualified and will not be further evaluated.

**Stage 2:** If a bidder succeeds in passing Stage 1 of the evaluation, then it will have its detailed tender response to the NMRN's requirements evaluated in accordance with the evaluation methodology set out below.

2. Award Criteria – Responses from potential suppliers will be assessed to determine the most economically advantageous tender using the following criteria and weightings and will be assessed entirely on your response submitted:

Criteria	Weighting
Quality of Method & Approach	70%
Commercial/ Value for Money	30%

3. Scoring Model – Tender responses will be subject to an initial review at the start of Stage 2 of the evaluation process. Any tender responses not meeting mandatory requirements or constraints (if any) will be rejected in full at this point and will not be assessed or scored further. Tender responses not so rejected will be scored by an evaluation panel appointed by the NMRN for all criteria other than Commercial using the following scoring model:

Points	Interpretation
0	<p>Very Poor (does not meet any of the requirement) or Very High/Extreme Risk The response is significantly below what would be expected because of one or all of the following:</p> <ul style="list-style-type: none"> <li>• The response indicates a significant lack of understanding</li> <li>• The response fails to meet the requirement</li> </ul>

1	<p>Poor (meets some of the requirement) or Above Average/High Risk</p> <p>The response meets elements of the requirement but gives concern in a number of significant areas. There are reservations because of one or all of the following:</p> <ul style="list-style-type: none"> <li>• There is at least one significant issue needing considerable attention</li> <li>• There is insufficient evidence to demonstrate competence or understanding</li> <li>• The response is light and unconvincing</li> </ul>
4	<p>Fair (meets most, but not all the requirement) or Average Risk</p> <p>The response meets most of the requirement, but there is a least one significant issue of concern or several smaller issues. These would require some further clarification or attention later in the procurement process and may arise through lack of demonstrated capability and/or appropriate evidence. The response therefore shows:</p> <ul style="list-style-type: none"> <li>• Basic understanding of the requirements</li> <li>• Sufficient competence demonstrated through relevant experience</li> <li>• Some areas of concern that require attention</li> </ul>
7	<p>Good (meets the requirement) or Low Risk</p> <p>The response broadly meets what is expected for the criteria. There are no significant areas of concern, although there might be limited minor issues that need further exploration or attention later in the procurement process. The response therefore shows:</p> <ul style="list-style-type: none"> <li>• Good understanding of the requirements</li> <li>• Sufficient competence demonstrated through relevant experience</li> <li>• Some insight demonstrated into the relevant issues.</li> </ul>
9	<p>Very Good (exceeds the requirement) or Very Low Risk</p> <p>The response exceeds what is expected for the criteria. Leave no doubt as to the capability and commitment to deliver what is required. The response therefore shows:</p> <ul style="list-style-type: none"> <li>• Very good understanding of the requirement</li> <li>• Considerable competence demonstrated through relevant experience</li> <li>• Considerable insight into the relevant issues</li> </ul> <p>The response is also likely to propose additional value in several respects above that expected</p>

4. Quality & Method of Approach Evaluation – The Quality & Method of Approach will be evaluated using the following criteria by the evaluation panel:
  - Relevant skills and experience
  - Understanding of the Brief
  - Quality of Method Statement and Approach.
5. Commercial Evaluation – Your “Overall Price” (as calculated in accordance with requirements of Annex 3 (Pricing Approach) for the goods and/or services will be evaluated by the evaluation panel for the purposes of the commercial evaluation. Prices must not be subject to any pricing assumptions, qualifications or indexation not provided for explicitly by the NMRN as part of the pricing approach. In the event that any prices are expressed as being subject to any pricing assumptions, qualifications or indexation not provided for by the NMRN as part of the pricing approach, the NMRN may reject the full tender response at this point. The NMRN may also reject any tender response where the Overall Price for the goods and/or services is considered by the NMRN to be abnormally low following the relevant

processes set out under the EU procurement rules. A maximum offer score will be awarded to the tender response offering the lowest “Overall Price”.

6. Moderation and application of weightings – The evaluation panel appointed for this procurement will meet to agree and moderate scores for each award criteria. Final scores in terms of a percentage of the overall tender score will be obtained by applying the relevant weighting factors set out as part of the award criteria table above. The percentage scores for each award criteria will be amalgamated to give a percentage score out of 100.
7. Interview & Demonstration – Following the desktop assessment, the NMRN will shortlist companies and invite the shortlist for an interview and demonstration of their system at NMRN Portsmouth. Interviews and the demonstration will be used to clarify and validate information received in the tender submission and scores may be adjusted accordingly. Interviews will not be scored in their own right.
8. The winning tender response – The winning tender response shall be the tender response scoring the highest percentage score out of 100 when applying the above evaluation methodology



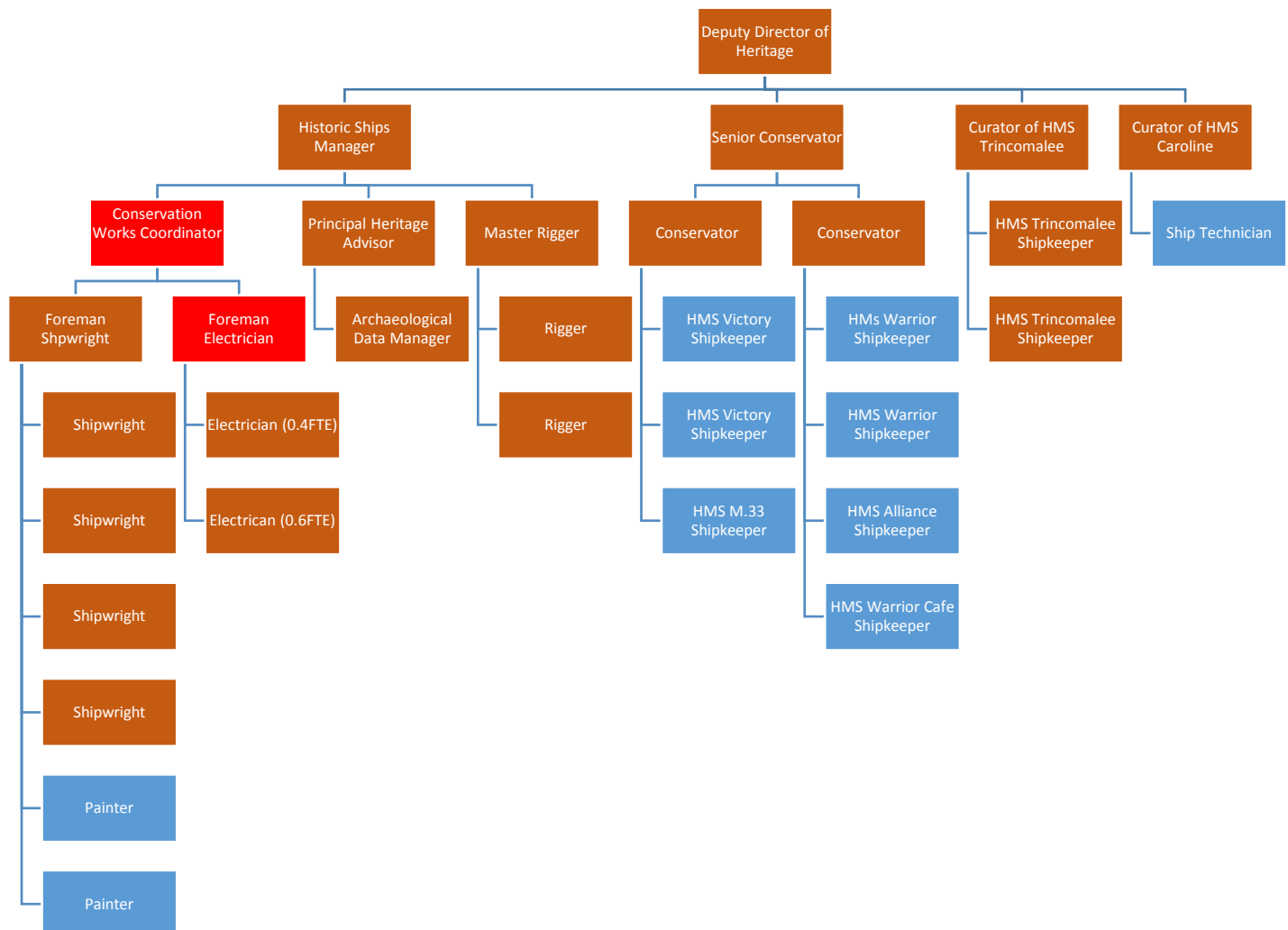
## Annex 5 – Historic Ships Structure

### 1. Team Structure

**Blue** – Historic Ships team who do not need FM software access & training

**Orange** – Historic Ships team members who do require FM software access & training

**Red** – The two advance trained team members



## 2. Ships

The table below shows the main ships which are maintained by the NMRN and their locations

Location	Ship
NMRN Portsmouth	<ul style="list-style-type: none"> <li>• HMS Victory</li> <li>• HMS Warrior</li> <li>• HMS M.33</li> </ul>
Royal Navy Submarine Museum, Gosport	<ul style="list-style-type: none"> <li>• HMS Alliance</li> <li>• Holland 1</li> <li>• X24</li> </ul>
NMRN Belfast	<ul style="list-style-type: none"> <li>• HMS Caroline</li> </ul>
NMRN Hartlepool	<ul style="list-style-type: none"> <li>• HMS Trincomalee</li> <li>• RML 497 (due to arrive January 2019)</li> </ul>

## 3. Current Annual Maintenance Work Structure

- 3.1. Each ship has a Planned Conservation Schedule (PCS) (Or PMS – Planned Annual Maintenance) which sets out the routine maintenance required for each vessel on a weekly, monthly, biannual, annual, two yearly etc. basis.
- 3.2. This includes work by our in-house team and also work from external contractors, who have Purchase Orders raised at the start of the year.
- 3.3. The PCS is delivered through an excel Spreadsheet (See Annex 6) which sets out the PO number, nature of the work, if it is conducted in-house or contracted in, Procurement procedure and its varying costs, due date and completion month.
- 3.4. This process is all done manually, with disparity between those overseen by the Historic Ships Manager, Conservators and posts at Hartlepool and Belfast.