# Invitation to Tender

# Summary

WFD is looking for a technology service provider to project manage, design, develop, and successfully deploy solutions as part of a transformation of its cloud-based corporate systems architecture powered by the Microsoft 365 platform.

# Overview

Westminster Foundation for Democracy (“**WFD**”) is the UK public body dedicated to supporting democracy around the world. Operating internationally, WFD works with parliaments, political parties, and civil society groups as well as on elections to help make political systems fairer, more inclusive and more accountable.

We are a problem-solving, practitioner-led organisation that offers:

* High quality and impactful regional and country programmes that directly support the full spectrum of institutions in political systems to develop inclusive political processes, more accountable political systems, protection of rights and freedoms, and more pluralistic societies;
* Specialist analysis, research, and advice to inform policy makers on a range of democratic governance issues through its Centre of Expertise on Democratic Governance; and
* International elections observation on behalf of the UK.

# Aim of this Invitation to Tender

WFD is issuing this Invitation to Tender (“**ITT**”) to a range of potential suppliers of services and would welcome a **bid** from your organisation.

WFD seeks a service provider to partner with WFD to deliver a target technical architecture for its corporate systems that ensures that critical applications are able to efficiently integrate, adapt with the organisation, and provide the level of organisational reporting required at all levels.

# Bid submission

All bids should be submitted by 23:59 on 6 March 2024 in writing, must comply with the requirements of this ITT, and must include the information requested in the Bid Requirements below.

The bid should be sent electronically and addressed to: Systems Procurement Team at procurement@wfd.org

The same email address should be used for any questions related to this ITT.

WFD’s standard terms and conditions for tendering and key policies are found at [Policies | Westminster Foundation for Democracy (wfd.org)](https://www.wfd.org/governance/policies) and you can find a copy of WFD’s Code of Conduct at [Code of Conduct | Westminster Foundation for Democracy (wfd.org)](https://www.wfd.org/policy/code-conduct).

# Detailed Specification

## Objective

Following a recent systems architecture review, WFD has decided to initiate a transformation programme to transition its current cloud-based corporate systems architecture powered by the Microsoft 365 platform and other external systems to a target architecture that ensures applications are able to efficiently integrate, adapt with the organisation, and provide the level of organisational reporting required at all levels. WFD is seeking a technology service provider that can partner with WFD to manage this transformation and design and deliver the improvements or new solutions required.

The key features of the transformation programme and target architecture will be:

* A new data strategy and single data warehouse;
* Robust requirements-gathering framework;
* Standardised application development;
* Effective change management processes;
* Redeveloped application(s) for managing new opportunities, programmes during implementation, and monitoring risks, activities, outputs, and outcomes associated across the portfolio;
* Designing and delivering a single reporting tool; and
* Developing a new contact/stakeholder management application.

The transformation programme will be overseen by WFD’s internal Outstanding Organisation Board, which will act as change acceptance board, and delivered in accordance with the Government’s Digital Service Standard, accessibility regulations and good practice, and WFD’s Managing Organisational Change and procedures. This includes WFD’s change project principles, namely:

* We will be opportunity/problem-driven and solutions focused
* We will design and implement the project in a way that is user-centred and respectful of people’s time and commitment
* We will be open and transparent about the changes proposed, the benefits to be achieved, and their realisation
* We will listen to the voice of our internal stakeholders to understand what they need and value
* We will always run an inclusive process involving staff from across WFD and do what we can to support them
* We will review the project results and take responsibility for continuous improvement

## Scope of work

We are expecting the new target architecture to be built on the Microsoft 365 platform, including but not limited to leveraging M365 capabilities available through:

* Microsoft Power Platform, in particular PowerApps, PowerBI and Power Automate
* Azure App service
* Python
* SharePoint
* Outlook
* Dynamics Business Central
* Jet Reports

The transformation programme will adopt an incremental and agile approach and be delivered between April 2024 to September 2025.

The selected supplier will project manage each change project as part of the transformation programme, supporting/validating requirements gathering and performing all design, development, testing, and deployment tasks. A copy of the Systems Architecture Review, referenced in the ‘Objective’ section will be made available.

It is anticipated that the winning provider will also need to take on the ongoing maintenance and support of Microsoft Dynamics Business Central, with an initial 12 month term.

Internal change management activities will be led by nominated WFD staff, with the support of the supplier.

## Deliverables

|  |  |
| --- | --- |
| Data strategy and warehouse | Validate existing data models and facilitate and document additional data modelling workshops, where required.* Implement data strategy that provides a consistent basis for all systems and applications to interact with
* Build single data warehouse using Dataverse
 |
| Requirements gathering  | Facilitate systematic requirements gathering activities relating to each proposed application development to ensure WFD captures, specifies, and documents its needs from its corporate systems and processes* Establish benefits realisation tracking processes
 |
| Develop new applications  | Design, develop, user acceptance test, and deploy new application(s) to enable new opportunity tracking and approvals, programme management, and monitoring information on risks, activities, outputs, and outcomes using the Microsoft Power Platform and integrated with Dataverse. * Design, develop, user acceptance test, and deploy new application for contact/stakeholder management as a bespoke Microsoft Outlook add-in, integrated with Dataverse

For each of the above:* Create design documents including: all requirements, data dictionary (database schema), data glossary, wireframes / overview, licensing requirements,
* Develop and implement a data migration process
* Produce application user guides
* Provide developer documentation including any source code
* Provide training to users
 |
| Implement fixes to existing applications | Deliver identified fixes to Microsoft Dynamics Business Central application. * Integrate Microsoft Dynamics Business Central application with newly developed applications / sync with MS Dataverse, as required.
 |
| Deliver ongoing support and Maintenance for MS Dynamics Business Central (Option) | It is anticipated that the winning bidder may need to take over the ongoing support and maintenance of Microsoft Dynamics Business Central. These costs should be separately itemised. |
| Improve SharePoint architecture  | Deliver improvements to SharePoint version management for documentation |
| Create customised reporting tool | Design and develop a set of PowerBI reports, dashboards, metrics and reporting pipelines integrated with the Dataverse |

## Timeline

WFD anticipates that the contract with the supplier will commence in April 2024 and continue until 30 September 2025.

## Reporting

In addition to producing a weekly update and a monthly report, the supplier will meet regularly with the Director of Operations, as Senior Responsible Officer for the transformation programme, and the Responsible Lead, the Head of Operations.

A representative of the supplier may be invited to join the quarterly meeting of the Outstanding Organisation Board.

## Working arrangements

It is anticipated that the supplier will deliver the assignments and engage with WFD colleagues remotely, although in-person meetings and workshops may be held at WFD’s London offices.

## Payments

Fixed cost payments will be aligned to milestones linked to each deliverable and/or change project.

## Minimum experience and expertise

# Expert knowledge of the Microsoft 365 platform and products. Solutions Partner for Microsoft Cloud would be advantageous.

# Significant experience of selecting, configuring, and deploying SaaS platforms covering a wide range of functions (finance, operations, project management, HR)

# Significant experience of Python coding language, and others.

# A relevant qualification and/or at least 10 years’ experience in a role relevant to the assignment (e.g., systems analyst, systems architect, solutions architect)

* A proven track record of using agile methods to design, build and deliver projects for clients that traditionally use waterfall methods.
* A proven ability and commitment to share knowledge with permanent staff in the delivery team.

# Familiarity with relevant industry standards relating to information management systems and security (e.g. ISO 9001:2015, ISO 27001:2022)

* Valid Cyber Essentials or Cyber Essentials Plus accreditation.
* Proven track record in delivering similar assignments, supported by references and case studies.

# Bid process

## Timescale

Below is the proposed timescale for the tendering process. Please note the dates are indicative and subject to change.

|  |  |
| --- | --- |
| Description | Date  |
| Issue ITT | *7 February 2024* |
| Closing date for receipt of completed tender proposals | *23:59 on 6 March 2024* |
| Shortlisting of bids | *7 March to 22 March 2024* |
| Supplier interviews/presentations to tender committee (if applicable) | *w/c 25 March 2024* |
| WFD announces preferred supplier | *w/c 1 April 2024* |
| Contract finalised and signed | *w/c 15 April 2024* |

## Bid requirements

In general, the bid should include the following:

1. Organisational profile
2. The professional CVs of the proposed delivery team
3. Proposed approach to satisfying each of the deliverables.
4. A proposed agile approach to working together with the WFD team
5. Financial proposal. This proposal should be clearly broken down by deliverable
6. References
7. Confirmation of compliance with General Terms and Conditions of Tendering

### Organisational profile:

* Company profile, including brief history and financial overview
* Case studies/credentials demonstrating relevant experience and skills profile

WFD is particularly keen to receive bids from organisations which are – or are working towards becoming – living wage employers and that have a broadly representative and balanced Board from gender and ethnicity perspectives.

### The professional CVs of the proposed delivery team:

* The CVs of the team should clearly indicate how the team will be able to work with the tech stack outlined in the ‘Scope of work’ section.
* In particular, WFD will be looking for profiles with these characteristics:
	+ Senior developer
		- Key skills: Python (5+years), Database (SQL Server, Oracle, other), SQL, Automation tools (Power Automate, Power Shell), Power Apps - Model driven apps, API development (FastAPI ideally), ideally experience of NodeJS.
		- Any experience of Microsoft O365 add in development is a bonus.
	+ Data architect
		- Key skills: 5+years experience, normalised(transactional) and dimensional (analytic) models, SQL Server, SQL, data migration, data integration
	+ UX designer
		- Key skills: Experience with User experience design and integration with requirements gathering processes. Understanding of O365 plugin interfaces and capabilities. Experience with Model driven power apps.

### Proposed approach to satisfying each of the deliverables:

* Clear explanation as to the proposed approach to meeting the specification set out in this ITT.
* Detailed project plan, including timelines, assumptions and dependencies, resourcing and risks.

### The proposed agile approach to working together with the WFD team

* Explanation of the key components of the proposed agile methodology including roles, responsibilities and ceremonies.
* An approach to sharing knowledge with WFD permanent staff in the delivery team.
* An approach to providing ongoing support of the applications.
* The bidder should provide evidence of how they define, measure and maintain good quality products and services.

### Financial proposal:

* Full breakdown costings for the proposed delivery team
* Separate accounting of VAT and/or any other applicable tax, duty, or charge.
* Detailing of any discount applied in view of WFD’s not-for-profit status.

### References:

* The bid should include details of two references relating to similar goods/services provided in the last three years. Please note – referees will only be contacted once Preferred Bidder status is assigned.

### Confirmation of acceptance of General Terms and Conditions of Tendering:

* By submitting a bid, you confirm acceptance to [WFD’s General Terms and Conditions for Tendering](https://www.wfd.org/policy/wfd-general-terms-and-conditions-tendering) which can be found on our website.

All bidders should also note the following:

* all bids should be submitted in English;
* all bids should be submitted in electronic form only;
* this ITT and the response may be incorporated in whole or in part into the final contract;
* only information provided in response to questions set out in this documentation will be taken into consideration for the purposes of evaluating the ITT;
* bids which are poorly organised or poorly written, such that evaluation and comparison with other submissions is notably difficult, may exclude the bidder from further consideration; and
* any bids which do not fully comply with the requirements of this ITT may be disregarded at the absolute discretion of WFD.

## Evaluation criteria

WFD intends to shortlist providers based on their response to this ITT and will use the following scoring criteria.

|  |  |
| --- | --- |
| *Description* | *Score*  |
| *Quality of bid document* | *15 %* |
| *Service offer and fit to specification* | *30 %* |
| *Value for money*  | *30 %* |
| *Professional profile, track record and experience, and references / case studies* | *25%* |
| ***Total Weighting*** | ***100 %*** |

WFD will score each criterion using the following table:

|  |  |
| --- | --- |
| 0 | The proposal submitted omits and fundamentally fails to meet WFD’s scope and specifications. Insufficient evidence to support the proposal to allow WFD to evaluate. **Not Answered**  |
| 1 | The information submitted has a severe lack of evidence to demonstrate that WFD’s scope and specifications can be met. Significant omissions, serious and/or many concerns. **Poor** |
| 2 | The information submitted has some minor omissions in respect of WFD's scope and specifications. The tender satisfies the basic requirements in some respects but is unsatisfactory in other respects and raises some concerns. **Satisfactory**.  |
| 3 | The information submitted provides some good evidence to meet the WFD’s scope and specifications and is satisfactory in most respects and there are few concerns. **Good.**  |
| 4 | The information submitted provides good evidence that all of WFD's scope and specification can be met. Full and robust response, any concerns are addressed so that the proposal gives confidence. **Very Good.** |
| 5 | The information submitted provides strong evidence that all of WFD's scope and specification can be met and the proposal exceeds expectation i.e. exemplary in the industry. Provides full confidence and no concerns. **Outstanding** |

## Tender Queries

Any questions related to this tender should be addressed to Systems Procurement Team at procurement@wfd.org.

## Equal Information

Should any supplier raise a question that is of general interest, WFD reserves the right to circulate both question and answer to other respondents, either via WFD’s website or by email. In this event, anonymity will be maintained.

## Annual reports

Please provide a link or copy of your company’s latest audited annual accounts with the bid.

## Other information

If the potential supplier believes that there is additional information that has not been requested in the ITT but is relevant to your bid, please include that information as a separate attachment and explain its relevance to this ITT.