



Re-design and re-launch of a WordPress platform

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Ref: 2022/23 -14

Re-design and re-launch of a WordPress platform connecting users to engage around the Circular Economy

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1. Overview

This invitation to tender is issued by ReLondon for the provision of external services to work on development and design of a second iteration of ReLondon's [Circular Economy Matchmaker](#) web app (built in WordPress) – with updated functionality and features to promote opportunities between circular small businesses and investors/public sector organisations. This re-design includes:

- A) Re-build of approx. 7 publicly facing webpages
- B) Re-build of registration page and forms, profile set-up pages and forms and various onboarding web-pages and pop-ups for 3 different core user groups, and subsequent back-end functions for ReLondon admin to manage registration approvals/denials and account management
- C) Re-build of publicly displaying profile pages for businesses
- D) Re-build of a searchable and filterable directory of business profile pages
- E) Partial re-build of certain platform automated emails to users, and new build of various automated platform transaction and marketing emails
- F) Re-establishment of platform analytics tracking user engagement
- G) Potential new build of resource webpage with downloadable documents for users
- H) New build of basic bulletin board or similar functionality available for logged-in users to signpost links to off-website business opportunities
- I) Migration of approx. 120 user profiles/data to new platform
- J) Provide UI and UX insights and knowledge of best practices to improve user journeys
- K) Hand-off and advisement of proper use and management of platform by ReLondon staff during project wrap-up

This invitation to tender is issued by ReLondon ('the customer') for the provision of consultancy services by 'the contractor'.

The contractor will have:

- ♦ The business, technical skills and experience working in the Wordpress platform, experience working on websites/ applications, experience in UI and UX design for web applications, and experience setting up inputs to analytic dashboards
- ♦ The capacity to deliver this project "in-house"

The contractor will be required to work alongside the Project Manager and will be supported by a small Project Group at ReLondon.

2. Background

Background of ReLondon

ReLondon is a partnership of the Mayor of London and the London boroughs to improve waste and resource management and to drive a transition to a low-carbon circular

economy across London's citizens, communities, business and public sector organisations (PSOs). ReLondon is the operating name of the London Waste and Recycling Board established under the GLA Act revised 2007.

Background of project

ReLondon originally launched this web application in December 2021 as a part of the Green New Deal funding from the Mayor of London in order to develop a matchmaking/brokering platform that would help circular economy small and medium sized businesses (SMEs) connect faster to, and access market opportunities with, investors and PSOs (namely local authorities).

The platform has undergone two rounds of development so far: an original design and build which did not satisfy ReLondon requirements, and subsequently a second round of development to rectify some issues, bringing it to the current state today.

ReLondon now needs a re-design round of development to make the platform fit for purpose for our current users, for our own team on the administration and maintenance side, and to create additional value for new users who we hope to onboard after the revamp.

In practice, we anticipate this project will require a rebuild on a new Wordpress template, re-implementing some features that we would like to retain from the current live version (indicated in this brief overview as re-build), and building in new currently non-existent ones. ReLondon is also open to the selected contractor fixing the current platform rather than rebuilding it, if deemed to be the most advisable path by the contractor.

Section 3 of this brief describes the functions of the desired end product. Section 6 details the corresponding desired features and describes the current state of existence for these features. Appendix A details all the redundant features that would need to be removed and the non-functioning features that would need to be fixed first if the developer chose to proceed within the current infrastructure.

3. Platform Key Goals

- I. To help circular SMEs in London to access investment and commercial opportunities, specifically by:
 - a. Helping them showcase both public and personalized/internal aspects of their business to investors and public sector organizations at scale
 - b. Helping them to access and attain new business opportunities by creating the relevant connections needed on the platform which will lead to investment, commercial contracts, community partnerships and more, which will proceed off-platform

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2. To help investors interested in circularity gain awareness and understanding of small circular businesses in London, and help them connect to these businesses, specifically by:
 - a. Providing an aggregated and filterable list of small circular businesses to search through for potential investees
 - b. Providing access to relevant and non-public financial/investment information about each business without investors needing to meet the business first (behind a registration wall)
 - c. Providing a quicker, easier and more trusted way to reach-out to the businesses and start a conversation off-platform
 3. To help public sector organisations (PSOs) find and better engage with circular London based businesses they can partner with to overcome key challenges and deliver valuable, cost effective, low carbon public services to their businesses and communities, specifically by:
 - a. Providing aggregated and filterable list of circular London businesses to search through for potential contractors/community partners
 - b. Providing access to relevant geographic, order capacity, and Proclass information about each business without PSO's needing to meet the business first (behind a registration wall)
 - c. Providing a quicker, easier and more trusted way to reach-out to the businesses and start a conversation off-platform
 - d. Creating a place where they can alert small circular businesses of opportunities for commercial contracts, partnerships, or pilots within their local borough at scale, ad hoc (subject to user testing)
 - e. Providing platform analytics for the PSOs about their time spent on the platform, and platform engagement leading to meaningful collaboration (e.g. pilot projects) and tenders won that they can include in the performance reporting
 4. To help ReLondon reduce workload by offloading some of the manual brokerage that we do between circular SME's and other stakeholder groups, specifically by:
 - a. Having a platform that is functioning to the above needs, and is inherently flexible to allow for ReLondon staff to update webpages, text, automated email templates, manual email templates, questions on registration forms etc. and manage overall registration approval etc.

In particular, we will be looking to track our achievement of these goals by looking at KPI's including but not limited to:

1. No. of profiles/accounts on platform from all 3 user groups
2. No. of connections made between circular SMEs & investor users to start conversations
3. No. of connections made between circular SMEs & public sector organisation users to start conversations

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4. No. of clicks throughs to SME business website from SME profile pages
 5. No. of click throughs to Matchmaker platform from user email notifications
 6. No. of resource documents downloaded from platform by users
 7. No. of pitch decks downloaded by investors from business profile pages
 8. No. of click throughs on tenders links on bulletin board
 9. No. of click throughs to other offsite links on bulletin board

4. Key Timeline

We are hoping to re-launch this platform by January 31st, 2023 with flexibility to launch latest February 28, 2023.

For the successful contractor, we anticipate a start date w/c December 1st 2022.

5. Budget

The total budget for this project is expected to be £9,670 including VAT and expenses.

6. Specific requirements and Features

- a) A home page, 3 other platform description webpages with calls to action(register), blog pages, a registration page, a business directory page, a feedback pop-up and a login page all visible to public. These are already built and would need to be re-built or fixed.
- b) Ability for SME's, investors and PSO's to register and be internally approved or declined by ReLondon admin, with subsequent automated onboarding emails from the platform for SME public profiles, and investor and PSO accounts. This process is already built but needs to be rebuilt or fixed.
- c) Ability for SME's to populate the info for a basic public profile page about their business, describing their product, their founders, with a header photo, and spot to upload any B corp certification badges (or other relevant badges in future) and linking to their website. These steps are already built and would need to be re-built or fixed.
- d) All the SME profile pages are aggregated into a directory of business profiles, that is searchable, and filterable. This is already built and would need to be re-built or fixed.
- e) After registering for an account and once logged in, investors and PSO's should have individual platform accounts tied to emails, which are not visible to anyone but admin, but allow the logged-in users to see additional private information displayed

on the business profiles such as financial information and order capacity info. This is half built, only built for investors so far, and design is not functioning as needed, needs to be re-built or fixed.

- f) Build “Connection request” buttons on the SME profiles, visible only to logged in investors and PSO’s. When investors or PSO’s click this button, an automated email is sent to SME account email, notifying them “Investor X from Y would like to connect with you on LinkedIn or via email (subject to off-platform solution chosen)”, and then all further interaction happens off platform. This is not built.
- g) Build a system of push notifications (email alerts) going to each user audience to drive them back to the platform to engage with business profiles, contracts, knowledge docs/blog pieces etc. Level of personalization (i.e. transaction emails), automation and frequency of these emails to be determined with contractor. This is not built.
- h) Build a bulletin board, visible only to logged in users where logged in PSO users can write a short description about tenders they have, and then include a link to that tender that takes you off-site, and post bulletins about suppliers or collaborations they are looking to fulfil, again with a call to action to click a link off-site or email them. Functionality for SME users to view all bulletins in one place, and click on links to external sites, or clicking on connection requests to owner of bulletin of the contract which triggers an automated email. This is not built, and is subject to ongoing user testing that ReLondon will have concluded by award of contract.
- i) Re-establish ReLondon capability to track submissions to the feedback form. This is not built.
- j) Establish ReLondon ability to collect platform KPI’s around engagement, i.e. clicks on CTA’s, clicks on connection buttons, click-through on platform emails and connect to dashboarding app. This is not built.
- k) Establish possibility/pre-build for later implementation/go-live a resource section/knowledge hub webpage housing some ReLondon documents that would be available for download, and potential ability for users to like/upvote these documents such as guides, toolkits, data reports, case studies etc. This is not built.
- l) Establish back-end/admin capabilities allowing ReLondon to easily and flexibly update webpage text and widgets as needed, update email templates as needed, update form fields, and manage overall user registration and profiles.
- m) Provide insight into UI/UX best practices from previous experience, to improve user journey and user experience on the platform at all stages

Output: A second iteration of The Circular Economy Matchmaker website (hosted in WordPress) – with updated functionality and features

Impact: Accelerate the scale up of circular innovation in London

7. Engagement and Deliverables

- a) A detailed project plan setting out the key activities and tasks to be undertaken to achieve the required features and specifications, and the order and timeline of development milestones between start and end date
- b) Participating in update meetings with the Project Group as required including:
 - 1) Project initiation meeting – meet the Project Group and agree the scope, methods and activity to be undertaken.
 - 2) At minimum a weekly or twice weekly meeting with project manager for contractor to show visual progress on the development, cover questions, challenges, and confirm ReLondon approval at every stage as development advances
 - 3) Effectively respond to weekly feedback from the Project Group in producing final outputs.
- c) Presentation of simplistic mock-ups (sketch accepted) of all new builds or changes to be shared and discussed with ReLondon for approval prior to development
- d) A fully functioning new version of the matchmaker by February 28th, 2023 latest.
- e) Hand-off and training to ReLondon team within a month of go-live for continued admin of platform

It may be possible to use ReLondon office space to undertake any meetings or project work.

8. Timetable for procurement

Submission of tenders deadline: November 24, 2022

Project start date: December 1st, 2022

Final platform delivery date: January 31st, 2023 - February 28, 2023 to be determined with contractor

Key Deliverables: To be agreed

Project end: Week of March 1st

9. Interface/Contract management

The main point of liaison between the Service Provider and the client will be Lalenya Maroulakis, Digital Product Manager and Circular Economy Advisor, and Laura Podmore, CE Matchmaker Project Manager.

10. Quality of service

The Service Provider shall provide the services in a competent, timely manner in accordance with recognised industry quality standards. The Service Provider shall ensure an adequate supply of suitably qualified and competent personnel are available to fulfil the requirements of the Contract.

11. Delivery personnel

ReLondon requires those submitting quotes to nominate key personnel with appropriate skills to perform the service for the duration of the contract.

The Service Provider shall ensure any changes to the key personnel be undertaken with minimal negative impact to the service and at no additional cost to ReLondon. ReLondon may, at its discretion, request that the Service Provider remove and replace any Key Personnel from the service that ReLondon considers in any respect unsatisfactory in the delivery and performance of the contract. ReLondon shall not be liable for the cost of replacing any Key Personnel.

12. Submissions

Quotes and bids should include information about the below technical and financial information, submissions of 2-3 pages for entire bid or quote is acceptable, at bidders' discretion.

Quotes and bids must be submitted by email to tenders@reondon.gov.uk by 5pm on 24th November 2022.

When submitting tenders, please use the reference "ReLondon tender: 2022/23 - 14 Circular Economy match-making platform"

Technical Approach

1. Detail their plan and suitability to fulfil the contract and scope of work described above, identifying the key milestones in their approach to delivering the project within the timeline.

3. Describe the inputs they will require from the ReLondon team prior and during the assignment.

4. Description of the personnel comprising the Delivery Team and their role in delivering the contract. Ex: Confirmation of team's expertise in needed areas

5. Demonstrate their company's experience with examples of previous projects. Ex: expect to see links to a few similar websites, with 1-2 sentences of how they were similar projects

Financial Proposal

A Pricing Schedule giving day rates and anticipated number of days for nominated personnel against the project milestones.

All quotes should be submitted in British pounds (£) and should include daily fees, any reimbursable transportation expense and VAT.

Proposal should split out costs as for each element for the project.

13. Contract

The contract will be formally let by ReLondon and ReLondon's standard terms and conditions will apply (available on request).

14. Evaluation

ReLondon must be satisfied that each potential contractor has the appropriate capabilities and resources available to undertake the work to our requirements and provide the necessary services. The process we use to select contractors is a competitive one. Your tender submission will be evaluated by us against the following criteria:

Evaluation criteria	Weighting
1. Total price as detailed in the Pricing Schedule provided.	30%
2. Experience and fit of allocated personnel, their skills and technical capability. Including examples of previous online platform designs as indication of the ability to <ol style="list-style-type: none">deliver on the platform goals, requirements and featuresmeasure the impact and the effectiveness of the final product(s).	40%
3. Project management approach, including key milestones and timeline that will deliver the project requirements	30%

15. Acceptance of Quotes and Bids

In issuing this invitation for quotes and bids, ReLondon is not bound to accept the lowest or any bid and reserves the right to accept the whole or any specified part of the bid unless the bidder expressly stipulates otherwise.

ReLondon will not enter into discussion with non-selected potential suppliers or justify its decision. Potential suppliers are deemed to have accepted these conditions by the act of submitting their quote. The selected preferred supplier cannot assume they have been granted the contract until a formal contract is signed.

16. Period for which bids shall remain valid

Unless otherwise stipulated by the bidder, bids shall remain valid for 30 days from the closing date for receipt of tenders.

17. Appendix A - Redundant and broken features/functionality on current site

Features to be removed

Remove link-throughs to retired external Community site:

- Remove copy about the mighty networks Community on the SME/Investor/PSO sign-up pages
- Remove the “View Community” buttons from the profiles of logged in SME/PSO/investors
- Remove 2 different email prompts in back-end of WordPress focussed around pushing users to the Community
- Remove content blocks about the community in the “Complete your profile” prompt email

Remove PSO and investor profiles from the directory, and convert to private accounts:

- Remove the “Type” filter on the directory search that allows you to choose between SME, investor and PSO
- Set all accounts tagged as Investor and PSO to be non-publicly visible, even to logged in SME’s (for now these accounts will retain their photos and public facing info on their private account while we redo user journey)

Features to be fixed

1. Broken externally facing features: broken feedback button, broken back button, directory is displaying double of certain business profiles, and more. Full list available upon award of contract.
2. Broken internal features: certain registration types bypass admin approval and are published to platform automatically, certain email prompts are not able to be tested or adjusted by admin users, certain webpages are not able to be accessed or adjusted by admins, back-end approval process does not allow for users on hold to ever be rejected, platform registration emails are still going to ex-ReLondon employee and email is unable to be swapped, etc. Full list available upon award of contract.
3. Adjusting disjointed copy/messaging: inconsistency on CTA’s used on home page and individual users sign-up pages, inconsistency on CTA buttons throughout webpages but text is hard coded in with no option to update from ReLondon admin side etc. Full list available upon award of contract.

User Journey adjustments to be made accordingly

1. Adjust the investor and PSO registration form fields
2. Adjusting the registration form for SME's, based on ReLondon wider registration form flow, and add in BT newsletter sign-up
3. Removing the PSO and investor profile set-up process, and creating engagement step after registration
4. Adjusting/streamlining the profile set-up form for SME's to be more user friendly
5. Adjusting the profile-setup form fields for SME profile set-up to include questions to pull through PSO modular info
6. Fixing flow for SME's from registration submission, waiting period, automated email approving them, and shortening/clarifying the steps to then get a profile live, and including more automated and timed prompt emails for unfinished users
7. Removing eligibility copy/messaging on SME/PSO/Investor sign-up pages
8. Removing the verification claims from ReLondon on PSO/Investor sign-up pages
9. Update the language used/ filter searches on the directory and adjust the tags available for SME's on profile setup

