

Resource Loan Management System

Invitation to Tender LAU\_CP\_0418

Specification and Supplier Response

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# Overview

Leeds Arts University is a specialist Arts institution delivering high quality teaching to further education, undergraduate and postgraduate students. Many of our courses have a high practical content, requiring use of resources and equipment within the University. Demand for these resources is high and we are seeking a system to enable us and our students to make the process of identifying and booking available resources more efficient.

# About Leeds Arts University

Founded in 1846, and gaining University status in August 2017, Leeds Arts University is the only specialist arts university in the North of England.

Our students enjoy a small, close-knit community in a creative atmosphere where anything feels possible. We believe this is the best environment in which to grow as an artist, designer or musician.

Leeds Arts University is the highest ranked specialist arts university for Student Satisfaction in the UK. The National Student Survey (NSS) confirmed that 91% of final year students at Leeds Arts University reported overall satisfaction with the quality of their course, ranking higher than all other UK specialist arts universities and all universities in Yorkshire.

The University currently has about 2100 students, with 1500 of those undertaking BA or MA courses and this will increase to around 3000 by 2023. The University has two sites: Blenheim Walk for HE and Vernon Street for FE.

# Project Objectives

The project objectives are as follows:

* Manage our resource inventory.
* Allow students to self-book studio resources or equipment.
* Give students a simplified web-based interface to manage their bookings.
* Track and take action against overdue or missing items.

# Project Team

* Project leader – Paul Bennett-Todd
* Head of IT – Chris Parkin
* Project Sponsor – Dave Russell (Pro-Vice-Chancellor Student Experience & Resources)
* Head of Finance – Helen Deacon
* Procurement Contact – Mark Robinson

# Current Resource Loans Process

The University runs a number of courses which make use of photography and AV resources. The University has two buildings (Blenheim Walk and Vernon Street) and resources are divided between them. The Vernon Street site is only for Further Education students while Blenheim Walk hosts undergraduate and postgraduates. The University is expanding and adding new courses in Film and Popular Music which will themselves have further bookable resources and facilities.

Students currently borrow resources by attending the appropriate resource area and requesting the item(s) needed. The workshops are open for a limited time twice a day, during which students may request equipment. Studio bookings can be made throughout the day.

Before being allowed to use some equipment or studios, students must first complete an induction (e.g. use of a darkroom or kit familiarity).

The length of a loan is usually 1 day (from the opening time of the workshop on day 1 to the closing time of the workshop on day 2). Extended loans are possible but at the workshop staff’s discretion. Loan periods may be shortened during times of high demand for equipment. Items returned late accrue a fine at the rate of £1 per business day per item.

Last year the combined total of resources loaned was 37,000 items. It is anticipated that this will increase significantly over the next few years, as we bring on more resource-intensive courses and recruit more students.

# Contract Duration and Scope

5.1 The project will cover:

* Setup and configuration of a Resource Loans Management System.
* Assistance with the on-boarding of users and data.
* Implementation timescale and system training and support.

The contract shall be for a period of 3 years initially.

# Response

In addition to the documentation requested in the ITT, suppliers are asked to respond to the requirements and questions in Appendixes 1 – 3. Responses will be scored and weighted according to the below table:

|  |  |  |
| --- | --- | --- |
| **Criteria** | **Sub-criteria** | **Weighting** |
| Whole Lifecycle Cost | See 7.2 below. | 30% |
| Functional Requirements | Scoring - Desirable 5 marks, Essential 10 marks | 50% |
| Support |  | 5% |
| Implementation Plan |  | 5% |
| Demonstration |  | 10% |
| References |  | unscored |
| **TOTAL** |  | **100%** |

The initial marking round will only take into consideration Costs, Functional Requirements, Support and Implementation plan. Only the top 3 scoring suppliers may be invited to do a demonstration and have their references taken, worth the final 10% of marks.

## Functional Requirements (Appendix 1)

Please see Appendix 1 for a full list of Functional Requirements.

**Essential:** These are requirements that the system **must** do. These are based on core requirements, security and driving factors for the need for a new system

**Desirable:** Desirable requirements are what we what we would like to see in the system, based on features which are not core to our use of the system.

Marks will be awarded for each requirement based on the below scale. The University will assess each response and award it a mark out of 10 (for Essential requirements) or out of 5 (for Desirable). Where a response is unclear, it may be asked to be clarified either in writing or as part of a demonstration.

|  |  |
| --- | --- |
| **Points awarded \*** | **Definition** |
| **0** | Unanswered or failed to address any of the requirement |
| **1** | Poor response to the requirements: significant failures to address requirement, significant failure to assure capacity/capability/ability, significant ambiguity; absence of full relevant detail; lacking supporting evidence |
| **2** | Fair response to the requirements: some failure to address requirement, some failure to assure capacity/capability/ability, much ambiguity; limited relevant detail; limited supporting evidence |
| **3** | Satisfactory response to the requirements: generally addresses requirement, general assurance of capacity/capability/ability, some ambiguity remains; limited relevant detail; limited supporting evidence |
| **4** | Good response to the requirements: addresses the requirement, clearly assures capacity/capability/ability, some ambiguity remains; limited relevant detail; supported by additional evidence as necessary |
| **5** | Excellent response to the requirements: fully addresses the requirement, fully assures capacity/capability/ability, free from any ambiguity; providing full relevant detail; supported by additional evidence as necessary. |

(\* - points doubled for Essential requirements).

## Support & Implementation Plan (Appendix 2)

**Support:** Is general information to be used to evaluate the tender submission. Suppliers will be judged on the size of their support and development teams, the hours of support and their standard SLA.

**Implementation Plan:** Is an indicative approach to implementation and the roles involved.

## Price Evaluation (Appendix 3)

* Tenders shall provide a whole life cost for a 3-year contract including any other costs identified by the Tenderer. This will form the basis of the price evaluation. For completeness, tender responses should include a price breakdown, detailing how the total price has been calculated.
* Any annual maintenance / licence costs should be included.
* If more than one implementation option exists (e.g. hosted, local installation), please include costs for both options. We will add on expected hardware costs to the University for any local installation option (server specifications must be provided if local installation is an option).
* Implementation costs should be broken down to show onsite, offsite consultancy days (estimated), daily expenses, project management time, and system costs.

Pricing information should be provided in the format set out in the Pricing Schedule at Appendix 3. A score out of 30% will be awarded for the overall price element of the evaluation.

The formula is - Available %, multiplied by lowest price received, divided by other prices received.

## Demonstration

The evaluation panel may, after short-listing, invite short-listed suppliers to present and this demonstration will be scored. The evaluation panel will be:

* Professor Dave Russell - Pro-Vice-Chancellor Student Experience & Resources
* Paul Bennett-Todd – Photography and Film Manager
* Chris Parkin - Head of IT
* TBD

## Compliance with Terms and Conditions

Leeds Arts University general conditions of purchase are enclosed within the tender documents. Please remember to return the non-compliance statement with your tender response.

# Appendix 1 – Functional Requirements 50%

**Tenders should complete the below tables against the requirements.**

Please mark in the response column as to whether your system **Fully** meets the requirement, **Partially** or **Fail**s to meet the requirement. You may supplement your response with details in the comments section if you feel there is a mitigating reason for only partially or failing to meet the requirement. Suppliers responding they Fully meet the requirement should explain how this is achieved.

Each requirement has been determined to be either Essential or Desirable. For the purposes of the requirements, users have been defined as such:

* Administrators – staff with access to the back end of the system and who will be checking in / out equipment.
* Staff – general University staff who are not authorised to manage the system, but may make personal bookings online.
* Students –current students at the University who make personal bookings.
* Users - either staff or students (not Administrators).

**A General Requirements**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Priority** | **Response** | **Comments** |
| A1 | The system should be accessible to all users via web browser and be compatible with all current popular browsers (Chrome / IE / Edge / Safari / Firefox). | Essential |  |  |
| A2 | The website should be configured for mobile use. | Essential |  |  |
| A3 | The system must have high-availability (99% uptime). | Essential |  |  |
| A4 | The system should be branded according to Leeds Arts University stylings. | Essential |  |  |
| A5 | The system should support the use of a barcode scanner for scanning of resources. | Essential |  |  |
| A6 | The system should store contact details for all borrowers (email & telephone). | Essential |  |  |

**B Users & Security**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Priority** | **Response** | **Comments** |
| B1 | Administrators must be able to register students in bulk onto the system. Or borrowers should be able to self-register with some validation process. | Essential |  |  |
| B2 | Users should be able to be organised into groups, restricting or granting access to certain resources as required. | Essential |  |  |
| B3 | Administrators should have differing rights within the system (areas of responsibility). An Administrator responsible for one resource area should not be able to alter resources or bookings in another area, unless they are a Global Administrator. | Essential |  |  |
| B4 | Password expiry must be enforced for Administrators and Users. | Desirable |  |  |
| B5 | All transactions – items booked in / out – must be auditable (date, time, issuing staff member). | Essential |  |  |
| B6 | Users should be able to request an automated password reset. | Desirable |  |  |
| B7 | Only current students studying at Leeds Arts University or staff working there should have capability to register and book resources. | Essential |  |  |

**C Resources**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Priority** | **Response** | **Comments** |
| C1 | Resources should be able to be flagged as active / inactive so as to allow for removal from loans for repair etc. | Essential |  |  |
| C2 | Resources should be grouped by Resource area. | Essential |  |  |
| C3 | Collection rules should be definable by Resource area. | Essential |  |  |
| C4 | Resources should be able to be defined as either rooms (studios) or equipment. | Desirable |  |  |
| C5 | Resources should be able to be defined as having prerequisites that students must meet. These prerequisites should be stored against the User’s profile once complete (e.g. having to do a studio induction before booking the studio). | Essential |  |  |
| C6 | The system should have the facility to bulk import resources (particularly for initial set up). | Essential |  |  |
| C7 | The system should be able to record user-definable and searchable attributes of the resource (e.g. lens type, zoom range). | Essential |  |  |
| C8 | Resources should be able to be blocked from being booked for periods of time (e.g. in case of repairs needed). | Essential |  |  |
| C9 | Administrators should be able to see a daily list of items going out / being returned according to their area of responsibility (e.g. camera loans would not be visible to studio bookings). | Essential |  |  |
| C10 | Resources must have a maximum loan period, definable in either days or hours. The system must account for evening / weekend / holiday periods. | Essential |  |  |
| C11 | University resources are barcoded, the system must be able to store this unique id. | Essential |  |  |
| C12 | Resources should be able to have a photograph of the equipment against its details. | Essential |  |  |
| C13 | Resources should be able to be linked to other items (e.g. camera with tripod) to simplify the booking process. | Essential |  |  |

**D Loans**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Priority** | **Response** | **Comments** |
| D1 | Users must be able to create / edit / cancel their own bookings online. | Essential |  |  |
| D2 | Users must not be able to see resources which they cannot book either according to their group or where compulsory inductions have been mandated. | Essential |  |  |
| D3 | Users should be able to specify particular dates they require resources and the system will display the potential availability of resources on those dates. | Essential |  |  |
| D4 | Bookings which have not been collected should automatically be cancelled at the end of the collection day. Notifications should be sent out to the borrower and staff. | Essential |  |  |
| D5 | Users should be able to add comments or make requests against their booking. | Desirable |  |  |
| D6 | There should be a limit on how many items a borrower can have on loan at any given time. | Essential |  |  |
| D7 | Administrators must be able to cancel bookings – with email notification going out to students affected by it. | Essential |  |  |
| D8 | Staff making a personal loan for themselves should have a longer default loan period (2 weeks) than students (1 day). | Desirable |  |  |
| D9 | Students who are unable to book an item for a timeslot they require should be able to go on a waiting list should that item be returned early or is not collected. | Essential |  |  |
| D10 | Upon being returned, an item is scanned back into the system. This should generate a confirmation email to the user confirming the return. | Desirable |  |  |
| D11 | If an item being returned is overdue, the Administrator checking the item in should be alerted and notified of the fine due. | Essential |  |  |
| D12 | Rules should be able to block loans of equipment to students not meeting specific requirements. | Essential |  |  |
| D13 | Overdue returns should automatically be flagged and the user emailed. | Essential |  |  |
| D14 | Fines should automatically be applied as defined once the item is late (students only). | Essential |  |  |
| D15 | Administrators should be able to view a student’s history – previous bookings and late returns. | Essential |  |  |
| D16 | Students with fines over a threshold value should not be able to book any further resources. | Essential |  |  |
| D17 | Administrators should be able to get an overview of all pending collections and returns. | Essential |  |  |
| D18 | The system should be capable of registering public holidays & other dates the university is closed. These should be factored into loan periods automatically. A loan that would finish in a prohibited period (see D19) should be blocked. | Essential |  |  |
| D19 | Students must not be capable of booking equipment over holiday periods (Easter / Christmas / Summer). However, administrators should be able to manually add a booking in these time periods. | Essential |  |  |

**E User Experience**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Priority** | **Response** | **Comments** |
| E1 | Students must get an email confirmation of their bookings and returns. | Essential |  |  |
| E2 | Confirmation emails should include a link to cancel the booking. | Desirable |  |  |
| E3 | Students should be able to access a calendar view of equipment availability. | Desirable |  |  |
| E4 | Users should be able to review previous bookings and create repeat bookings from them. | Essential |  |  |
| E5 | Users should be able to “watch” items booked by other people, in case they are returned early or not collected. | Desirable |  |  |
| E6 | Resources should have associated key words, allowing for simple searches. | Essential |  |  |

**F Reports**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **#** | **Requirement** | **Priority** | **Response** | **Comments** |
| F1 | Reports should be capable of running across a user-defined date range. | Essential |  |  |
| F2 | Reports must be exportable to popular formats (e.g. PDF, CSV, Excel). | Desirable |  |  |
| F3 | The system should come with a standard set of defined reports, but allow for modification (e.g. being run across custom date ranges / resource types). | Essential |  |  |

# Appendix 2 – Support, Implementation and Additional Information

**Tenders should complete the below tables against the requirements.**

In this section, you are required to provide a description with supporting evidence of how your organisation will meet the requirement in question.

**Support 5%**

|  |  |  |
| --- | --- | --- |
| **Ref** | **Requirement** | **Response** |
|  | Detail the number of full time employees in a **development** role for the Resource Loan software. |  |
|  | Detail the number of full time employees in a **support** role |  |
|  | Provide a copy of your standard support SLA, including hours of support and any tier-based support services provided. |  |

**Implementation Plan 5%**

|  |  |  |
| --- | --- | --- |
| **Ref** | **Requirement** | **Response** |
|  | Please provide an implementation plan based on your understanding of the requirements of the University including your standard approach to implementation, timescales and the roles involved. |  |

**Additional Information unscored**

|  |  |  |
| --- | --- | --- |
| **Ref** | **Requirement** | **Response** |
|  | If your system has additional functionality or features, which you have not had the opportunity to describe above, please do so here. Include details of any system or payment integrations you may offer. |  |
|  | Please explain your offer in terms of “open licence” usage, restrictions on concurrent user numbers and anything else that may be relevant. |  |

# Appendix 3 – Whole Life Costs 30%

**Suppliers should provide a detailed breakdown of the whole life cycle costs (excluding VAT).**

|  |  |  |
| --- | --- | --- |
| **Ref** | **Requirement** | **Response** |
|  | Whole Life cost to be broken down on a per year basis to include;   * Implementation/set up * Training/consultancy * Annual subscription * Support / Maintenance * Expenses * Added value * Anything else |  |
|  | Total cost first 3 years | £ |