**Call-Off Schedule 20 (Call-Off Specification)**

**Statement of Requirements**

**CCCC22A12 - Assurance Partner for the InSite Programme**

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# PURPOSE

## The Office of Government Property (OGP), also referred to as “the Authority”, provides strategic leadership to government and the wider public sector organisations to manage their estates more efficiently and effectively, helping to deliver the finest public services and supporting the government’s priorities by unlocking surplus land for housing, and encouraging the creation of public service jobs outside London to support economic growth. OGP builds capacity and capability in the property function across government through leadership of the Government Property Profession and improving the use of data for better decision-making. The Authority does not manage any property or estate.

# BACKGROUND TO THE CONTRACTING aUTHORITY

##  The Authority provides strategic leadership to government and the wider public sector organisations to manage their estates more efficiently and effectively, helping to deliver the finest public services and supporting the government’s priorities by unlocking surplus land for housing, and encouraging the creation of public service jobs outside London to support economic growth. OGP builds capacity and capability in the property function across government through leadership of the Government Property Profession and improving the use of data for better decision-making. The Authority does not manage any property or estate.

##  In line with above, the Authority developed and published the Government Property Strategy, 2022-2030[[1]](#footnote-1).

##  The OGP programmes include:

### One Public Estate (OPE): a partnership between the OGP and the Local Government Association (LGA) to provide practical and technical support as well as funding to councils to deliver ambitious property-focused programmes in collaboration with central government and other public sector partners.

### Disposals programme: OGP works with departments, seeking to manage and release government property and land, which raises capital receipts, cuts running costs, and delivers local economic growth, including new homes and jobs.

### Places for Growth: This programme works with Departments, Professions, and Arm’s Length Bodies (ALBs) to encourage the movement and creation of civil service roles outside London.

### Government Property Profession (GPP): OGP works to improve the capability of the Government property function. Working with the GPP Board, this includes specific development for the 2,000 members of the Government property profession.

### The Government Property Function: The OGP leads the property function that exists to support the delivery of central government services.  Around 4,500 people are employed in the function across government, managing a large estate, working towards delivering the Government Estate Strategy.

### Developing cross government strategy and policies on Facilities Management, Whole Life asset management and Sustainability.

### Developing cross government property standards.

## The Authority has an in-house data and analytics capability that provides specialist expertise to the unit, the property function and the circa 1,200 public sector organisations that contribute data to it. The capability spans data collection, storage, management and geospatial analysis, developing insight-based management dashboards and performing financial modelling.

# Background to requirement/OVERVIEW of requirement

## The Office of Government Property (OGP) requires an InSite asset register (or the InSite system) to consolidate strategic property data from different public bodies to help support cross government policy making and strategic decisions. The purpose of this requirement is to secure procurement support to procure the Technology Supplier (hereafter referred to as the Technology Partner) for the asset register.

## The InSite system will provide a better central line of sight of the whole government estate. InSite system will collate information on properties owned, occupied and managed by government and the wider public sector, into a central database. It will replace an existing solution; the Electronic Property Information Mapping Service (ePIMS).

## It will operate at a portfolio level for government land, buildings, and occupancy; with strategic data only. It does not involve operating at a transactional services level such as work orders, maintenance schedules, rent rolls and leases. The operational functionality and data content are within the remit of property departments within public bodies who hold the assets concerned. It provides the Authority with the ability to review the current estate and analyse future requirements.

## It helps to support the delivery of the Government Property Strategy 2022 - 2030, a link to which is provided here:

## (https://www.gov.uk/government/publications/government-property-strategy-2022-2030)

## Users in public bodies will access the property data held within the solution that may have been provided by other public bodies, subject to authorisation of the user, and security classification of each record.

## The InSite system replacement is being delivered by the InSite Programme in OGP. Within this programme, there is also a data workstream that has a data standard for the property data to be held within InSite. It is anticipated that the InSite system will have c.115 data fields to start with, which are defined in this data standard.

## Requirements for the replacement technology system were previously defined. In brief it is a cloud-based cross-public sector property information solution that:

### Allows manual data entry through a series of secure and intuitive GDS Service Standard compliant user interface(s)[[2]](#footnote-2);

### Allows data collection from designated government databases and 3rd party sources;

### Validates data against the associated data standard;

### Gives access to the data held to authorised government organisations;

### Uses this data to create dashboards, reports and analytics using Business Intelligence and geospatial analytics, against unique user and data permissions. For sake of clarity, it need not provide self service ability to change those reports and analytics to all users.

### User volumes are in the region of 1,200+, with varying levels of activity by user credentials; many being used a limited number of times a year.

## The InSite asset register provides a data feed to the Government Property Finder (GPF) - a website that brings all public property for sale, linked with estate agents. The existing property finder can be found here: <https://e-pims.cabinetoffice.gov.uk/government-property-finder/Home.aspx> as is currently being redeveloped. A subset of data is linked via API from the Inset asset register solution to the GPF solution.

## GPF development is out of scope for this procurement, but the direct data linkage between the GPF and InSite asset register needs to be considered.

## A previous attempt at creation of the InSite system resulted in the main operational aspect of the system in place to collect, validate, store and report on the data fields.  Code and design documentation to date is available for review (hereafter referred to as the Previous Solution). It is not essential that the previous solution is carried forward, if a better solution exists.

## Assurance has been completed on that work delivered to date, and the Supplier will have the opportunity to understand what requirements were delivered in more detail at the start of this engagement.

## The data workstream is ongoing within the OGP and wider stakeholder group. The provision of property data against this standard has been mandated by the Cabinet Office Minister and Government Organisations, who have been assessed on their readiness to provide data into InSite.

## The assurance partner (hereafter referred to as the Supplier) is key to identifying a viable way forward to complete the system build.

## The previous solution is an AWS focused solution that utilises APIs to collect and validate the data, storing in a PostGres database, with AWS Microservices enabling the processes.  The system then utilises Tableau and ESRI Software to allow users to query this data.

## The Supplier who worked on the previous solution has now handed over the partially complete product to the Authority, along with all completed artefacts including documentation.

## The following items have been included to give the Supplier some background information of that phase for which the Authority requires technical assurance and support.

### Annex A – Requirements.

### Annex B – A Technical Report on the Previous Solution.

### Annex C: The data standard with 110 data fields identified with a flag.

## The Authority has accepted the following aspects which have been ratified by the previous technology assurance partner:

### API, Taxonomy API, Reference API, Implementation Guide, Reference API Guide(s).

### Operational database with full data standard. User management, data workflow, system administration, data quality rule management.

### API CSV, API Validation Rules – Schema / Business Documentation.

## The functionality still outstanding in the previous solution is split into the following milestones and built upon previous deliverables that the original produced:

### Design, build, test of all user interface pages.

### Design and build of reporting database, visualisations and reports.

### User companion guides, metadata documentations and video recordings.

### Spatial data capture against records.

## The next phase of the programme is to procure a new Technology Partner in a way that leverages the work completed to date, if viable.

## Further background detail on the system requirements include;

### The system will provide for approximately 115 business data fields when it first goes live. E.g. location/ address, cost, rent, value, lease expiry dates, floor areas.  These fields are contained in the Data Standard in Annex C. Operational property management data, such as transactional data, **is not required in this system**.

### Responsibility for the base data accuracy will primarily rest with the public bodies. The system will need business as well as technical validation rules on the data being entered. There are currently over 187 such validation rules, 87 schema and 100 business.

### The system must contain support for data management and governance.

### It must incorporate simple business intelligence and analytics outputs which surface the data to non-technical users. It must also incorporate web front-end mapping.

### It will be based on Cabinet Office supported technologies. In addition, it should be compliant with the GDS Service Standard[[3]](#footnote-3).

### It does not require self-service analytics for all users. It may contain self-service capability for only the Authority users, who will also manage the user administration of the system. These will be about 20 such users at the maximum.

# definitions

|  |  |
| --- | --- |
| **Expression or Acronym** | **Definition** |
| ALB | Arm’s Length Bodies |
| API | Application Programming Interface. |
| AWS | Amazon Web Services |
| CDIO | Cabinet Office Chief Digital Information Office |
| CSV | Comma Separated Value |
| Technology Partner | The successful contracted Supplier who will be responsible for the development of the Insite solution. |
| InSite system  | Another name used for the InSite asset register in this document. |
| ESRI | Environmental Systems Research Institute |
| GDS | The Government Digital Service, part of the Cabinet Office, is a centre of excellence in digital, technology and data, collaborating with Departments to assist with their system transformation. |
| GPF | InSite Government Property Finder. |
| GPP | Government Property Profession |
| LGA | Local Government Association |
| MOG | Machinery of Government |
| OGP | Office of Government Property, Cabinet Office |
| OPE | One Public Estate: a programme of the Office of Government Property. |
| e-PIMS | Electronic Property Information and Mapping Service. This is the existing central database of Government Central Civil Estate properties and land to be replaced by InSite asset register. |
| UAT | User Acceptance Testing |
| Previous Solution | A work in progress technology solution for InSite asset register that was part built which may (or may not) be taken forward. |
| Assurance partner | The winner of this tender/ future provider of services for this statement of requirement. |

#

# The requirement

## The Authority has set out a summary of suggested activities to achieve the required results; and the Authority will expect the Supplier to provide a detailed plan and agree any changes to these within the first week of the engagement. The requirement is detailed in the below elements / stages;

## Familiarisation and gap analysis

### A review of work undertaken to date to inform soft and formal procurement activities. Review of the solution context. Review of the existing functional and non-functional requirements that defines the overall solution requirements.

### An articulation of outstanding functional and non-functional requirements through existing internal knowledge, and artefacts (code base, project team reports, meeting and speaking with OGP team) to inform soft and formal procurement activities.

### Ensure requirements bring out the extent of work required and focus of the work for the Technology Partner.  Ensure the requirements are aligned to GDS Service standard to meet criteria, e.g. data provenance, user research, project delivery approach.

### Scope out the best practice mobilisation phase and key documents / induction processes needed to support the Technology Partner. Identify draft appropriate milestones that would be best applied to the system development that ensure the programme is on track and aligned to requirements and best practice. The milestones are likely to be based around functionality.

## Technical documentation for a soft market activity and formal procurement

### Use the work conducted in 5.2 above to create technical documentation required for procurement of the Delivery Partner. The documents produced will form;

## a) information provided in the pre-bid soft market engagement activity and

## b) a full bid-pack creation for a digital marketplace listing.

### *For the soft market engagement:*

#### The full format of documentation required for this phase will be agreed in-flight dependent on the soft launch approach taken. It should however include:

##### document(s) setting out the objective and key questions that soft market testing will seek to answer;

##### any relevant design documentation to date.

### *For the procurement activity:*

#### It should identify relevant technical questions and draft evaluation criteria that supports delivering the right solution and ensuring the supplier has the right capabilities and capacity, including:

##### a Digital MarketPlace Shortlisting criteria to ensure suppliers have the necessary capability and capability to deliver;

##### specific technical questions for the bidders to respond to;

##### an evaluation criteria aligned to each technical question to support OGP in identifying what good looks like;

##### a proposed pricing evaluation;

##### project context documentation, including but not limited to relevant systems-agnostic design documentation to date.

### Help fill a gap in technical knowledge to ensure the exercise is a success and the build of the new service can resume. This should cover the soft market engagement, initial digital marketplace short listing and assessment of shortlisted suppliers.

## Soft market engagement

### Support with soft market testing, in order to stimulate the market, and also validate the possible direction being taken out to formal procurement. Provide OGP with the evidence required to validate the brief being taken out to formal procurement, and secure senior stakeholder buy-in.

### Create documents outlining the objective and key questions that soft market testing will seek to answer.

### Act in the capacity of technical ‘Critical Friend’ for this activity, critically assessing supplier responses and advising OGP on trends, whether suppliers have met the requirements, and recommendations for next steps. Support with answering specific supplier questions and publishing answers.

### Report on soft market engagement findings. The result of the soft market testing should frame and report feedback against objectives and key questions agreed as part of activity in point 3.3 (technical documentation for procurement). Specifically, it will address a high-level summary of technical responses, synthesis of common trends, any risks identified, whether suppliers have demonstrated an ability to meet the technical requirements, and recommendations for next steps built on this evidence.

## Updating technical documentation for procurement

### Ahead of formal procurement, revisit the technical document produced before the soft market engagement and ensure it is still applicable and accurate. If the soft market engagement, or board approval changed anything, ensure the documentation is updated accordingly.

### A final bid pack will be produced which includes:

#### A requirement that details the technical specification being sought by OGP;

#### Contextual design documentation to date;

#### Technical questions and tender pack;

#### Technical evaluation process (How to Bid document);

#### Pricing evaluation;

#### Terms and conditions (based on the selected framework) including any special terms advised to OGP.

## Procurement evaluation support

### Operate on the evaluation panel. Recommend best practice, such as on scoring and evaluation. Produce a scoring rubric to ensure impartial and consistent technical evaluation. Score suitable suppliers on their ability to deliver.

### Throughout formal procurement, operate as a technical ‘Critical Friend’, supporting the interrogation of supplier proposals against the identified requirements.

### Up to a four/five week pause will be required within the project delivery duration to allow bidders to respond, which will not impact upon day rates and durations stated in the pricing schedule above.

### In scope for this requirement is the procurement for the Technology Partner and activities prior to and required for a live procurement. OGP will provide the Supplier the necessary contextual information and documentation relating to the development to date. All requirements are mandatory.

### Out of scope for this requirement;

#### Support after the appointment of the Technology Partner, or the delivery phase;

#### Satellite solutions / systems associated with Insite themselves (e.g. Government Property Finder, Government Property Profession Portal);

# key milestones and Deliverables

## The potential provider should note the following project milestones that the Authority will measure the quality of delivery against:

## The following Contract milestones/deliverables shall apply:

|  |  |  |
| --- | --- | --- |
| **Milestone/Deliverable** | **Description** | **Timeframe or Delivery Date** |
| 1 | Contract returned and signed | Within 1 working day of contract award |
| 2 | Mobilise | Within 4 working days of contract award |
| 3 | Familiarisation and gap analysis -* Review all of the existing artefacts and produce an outline report on completed and outstanding functional and non-functional requirements, mobilisation approach and key milestones.
 | 2 weeks, or within 3 weeks of contract award. |
| 4 | Technical documentation for procurement -* Objectives and key technical questions list.
* Digital MarketPlace shortlisting criteria.
* Evaluation criteria.
* Proposed pricing evaluation.
* Background project context documents.
 | 5 weeks, or within 8 weeks of contract award. |
| 5 | Soft marketing engagement and updating technical documentation for procurement* Document outlining objective and key questions.
* Participate in the soft market test
* Report on soft market engagement findings.
* Full bid pack finalisation with any relevant updates from soft market engagement findings and Terms and Conditions.
 | 4 weeks, or within 12 weeks of contract award. |
| 6 | Procurement evaluation supportBid will go live and there will be a pause of 4 to 5 weeks for suppliers to respond* Provide responses to any technical questions from suppliers.
* Scoring rubric and technical evaluation.
* Evaluation panel assessment and scoring.
 | 3 weeks, or within 15 weeks of contract award. |

The supplier will immediately inform the Authority at any time it experiences issues with any part of the project timelines or issues with delivery.

# MANAGEMENT INFORMATION/reporting

## Weekly stand-up review meetings with the InSite Programme Director.

## Weekly Draft reporting in line with key milestones and deliverables.

## All key milestones should be delivered as detailed in this Statement of Requirements.

## Provide technical input into governance forums and presentations where needed, such as the InSite Programme Board, InSite Steering Group, CDIO Advisory Board, the CDIO Enterprise Architecture Board.

## The Supplier will utilise management tools to record and ensure all team details and KPIs are kept updated.

# continuous improvement

## The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## The Supplier should present new ways of working to the Authority during Contract review meetings.

## Changes to the way in which the Services are to be delivered must be brought to the Authority’s attention and agreed prior to any changes being implemented.

# Sustainability

## Please include details of any sustainability considerations Potential Suppliers should include in their submissions.

# PRICE

## Prices are to be submitted via the e-Sourcing Suite Attachment 4 – Price Schedule excluding VAT and including all other expenses relating to Contract delivery.

# STAFF AND CUSTOMER SERVICE

## The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

## The Supplier’s staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.

## A Supplier Team shall, should be Baseline Personnel Security Standard cleared, which must be dated within three months of the date of signing the contract.

## The Supplier shall have relevant experience working within complex multi-supplier technical ecosystems.

## The Supplier will be expected to be conversant with real estate data knowledge in order to interpret the underlying conceptual data model and therefore the validation rules and system design being applied.

## The Supplier will be expected to specify as a minimum, a named Overall engagement Director, a Bid Manager and a Technical Architect with relevant skill set available for the duration of the contract, excluding the four/ five week bid response/ pause period.

##  Experience in complex solutions architecture is essential. This includes cloud-based solutions including deployment, design and management of AWS environments, understanding of database technologies, API design and integration, COTS integration, user licensing models, government security principles, User Acceptance Testing and single sign-on approaches for integrating solutions. Experience in UI and accessibility would ideally include government specific GDS service assessment. Experience working within the government Service Standard would be beneficial.

## Any changes to Supplier staff within the duration of the contract period should be agreed in writing with the Authority.

## The Supplier shall work as a self-organising team, using Agile principles and methodologies, delivered as per the GDS Service Manual (e.g. agile delivery aligned to scrum methodology) or other methodologies as required.

## The Supplier shall identify any conflicts of interest and, where identified, shall inform the Buyer of such conflicts of interest and how they plan to mitigate the risk. The Authority will require a Declaration of Interests to be populated (Please see Annex D – Declaration of Interests) by the Winning Supplier at Contract Award stage to perform this engagement.

## The Supplier shall ensure that staff understand the Authority’s vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

## Any supplier staff who will have access to data in this project should be Baseline Personnel Security Standard cleared. Those members of the project team who will be on the premises, at the location set out below, will be expected to adhere to the security process in place at the building.

## The details for the project team who will be carrying out the work must be supplied to the Authority as part of the evaluation process and confirmation of the clearance that they currently hold.

# Security and CONFIDENTIALITY requirements

## Please see Call Off Schedule 9 for further details.

# payment AND INVOICING

## Payment can only be made following satisfactory delivery of the items of work as listed in the pricing schedule.

## Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

## The Authority will issue a purchase order at the start of the contract. To enable prompt payment the Potential Bidder should submit invoices for payment clearly quoting the purchase order number to:

## **[Redacted]**

# CONTRACT MANAGEMENT

## The Authority shall provide access to all previous relevant design documentation, technical assurance documentation and development code for the existing solution development to-date.

## Attendance at Contract Review meetings shall be at the Supplier’s own expense.

# Location

## The base location of the Services will be carried out at the Authority’s office at 10 South Colonnade, London, E14 4QQ. Review sessions will be scheduled in advance to ensure attendance can be secured if required.

## The Authority uses Google Meet for remote collaboration in support of this approach and expects the supplier to be able to access this tool.

1. https://www.gov.uk/government/publications/government-property-strategy-2022-2030#:~:text=The%20Government%20Property%20Strategy%202022,achieving%20better%20value%20for%20money. [↑](#footnote-ref-1)
2. https://www.gov.uk/service-manual/service-standard [↑](#footnote-ref-2)
3. https://www.gov.uk/service-manual/service-standard [↑](#footnote-ref-3)