Statement of Requirements

Contract Reference: CCCC20B11 Provision of Consultancy for Routemap Refresh Project

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1. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

1.1 Project Routemap ("Routemap"), as referenced to above, is a structured and tested methodology used to set up projects for success. It is the product of government working in collaboration with industry (through the Infrastructure Client Group) and academia. When applied to the Government's major infrastructure projects, it can help achieve 'faster, better, greener' delivery, supporting the recently announced Project Speed.

1.2 However, Routemap was written approximately 6 years ago and, though the principles remain sound, it needs updating if it is to remain a core tool in the IPA's support offer.

1.3 The IPA requires consultant support to refresh the UK versions of the Routemap handbook and modules to:

- Better support users with practical application of the Routemap methodology.

- Reflect recent best practice and lessons learned from major project delivery.

- Develop marketing and familiarisation materials for stakeholder engagement.

2. DEFINITIONS

Expression or Acronym	Definition
BIM	Building Information Modelling
GMPP	Government Major Projects Portfolio
IPA	Infrastructure and Projects Authority
MMC	Modern Methods of Construction
P13	Project 13
SME	Subject Matter Expert
SLT	Senior Leadership Team
SRO	Senior Responsible Owner

3. SCOPE OF REQUIREMENT

3.1 Routemap is a structured and tested methodology used to set up projects for success and a core product of the IPA support offer. It provides a collaborative way for stakeholders to work together, towards practical solutions to address gaps in project capability. Routemap ensures best practice and learning about the most common causes of project failure are considered at crucial early

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stages of development. Routemap has been successfully deployed by some of the UK's highest profile projects, e.g. **REDACTED**

3.2 In order to prepare bids that meet the IPA's requirements, bidders should familiarise themselves with:

3.2.1 the current **UK versions of the Routemap handbook and modules** found **here**, and

3.2.2 the recently published **International versions of the Routemap handbook and modules** found **here**. These are based on the current UK versions adapted for international audiences and contain clearer, more accessible process guidance and explicit linkages to the 5 Case Model which can be leveraged for the refresh of the UK versions.

3.3 The governance of the work is anticipated to be as follows:

3.3.1 The Director, Function, Profession and Standards, will be the **SRO** for this project.

3.3.2 A **Project Board** will be established comprising of the SRO and a small number of other IPA officials to oversee the progress of the project and to take key decisions including award of the consultancy contract, consultant performance, budget management and readiness of materials for sign off and publication.

3.3.3 A **Project Advisory Group** will be established to own the vision, agree the statement of requirements and to advise the SRO and Project Board on the quality of deliverables. Membership of the Project steering group is yet to be determined but will likely include:

● Director, Function, Profession and Standards (the SRO)
● the Contract Lead from the external consultancy hired to author the updated materials
● One or two prominent Industry figures selected to ensure industry buy-in and give credibility to the final products

3.3.4 A **Project Working Group** will manage the project to deliver the agreed requirements, manage interdependencies between the handbook and the various modules and ensure consistency of style and language throughout. Again membership is yet to be determined but will likely include:

● The Project Initiation Capability Lead and Manager
● the Project Manager from the external consultancy hired to author the updated materials
● One or two representatives from major project organisations

3.3.5   A number **Technical Sub-Groups** will be established to provide content for the updated handbook and modules, and to quality assure drafts before they are submitted for sign off.

There will likely be one Technical sub-group for the handbook and complexity/capability assessments and one for each of the modules. These groups will be managed by the external consultancy hired through this tender process and membership will be subject matter experts drawn from major project organisations and the IPA.

3.3.6   The updated handbook and modules will need to be **signed off** by the IPA's CEO and the Director, Function, Profession and Standards (the SRO) before publication on the gov.uk website.

3.4   The requirement has been grouped into six separate but interdependent packages which are summarised below:

3.4.1   **Package 1** - Central authoring, editing and document production of the **refreshed Handbook**

3.4.2   **Package 2** - Central authoring, editing and document production of the **refreshed existing Modules**

3.4.3   **Package 3** - Feasibility study on **applicability of Routemap to non-Infrastructure projects**

3.4.4   **Package 4** - Central authoring, editing and document production of a **new module on Systems Integration**

3.4.5   **Package 5** - Refreshing the **complexity and capability assessments**

3.4.6   **Package 6** - Development of **marketing** and **familiarisation** materials

3.5   The external consultants will also be expected to 'project manage' the packages of work outlined in 5.4 and described more fully in section 6.

3.6   A number of the packages of work require input from subject matter experts (SMEs) to contribute content and technically assure deliverables. The IPA will source subject matter experts from the wider IPA and major project organisations. The external consultants will be expected to identify SME's by reaching back into their own or sub-contracted organisations.

3.7   It is anticipated that SMEs will contribute content primarily through attendance at Technical Sub-Group meetings organised by the external consultants and through the review of draft materials prepared by the consultant team. The SMEs will not be expected to author deliverables (this is the role of the external

consultant team) but, for ease may wish contribute content by way of notes or diagrams which the consultant team can incorporate into the deliverables.

3.8 The project delivery approach described above represents the Contracting Authority's current best thinking. However, bidder/s are encouraged to be innovative with their bids. The Contracting Authority will consider suggestions to improve this approach in order to deliver high quality deliverables in a cost and time efficient manner.

4. MANAGEMENT INFORMATION/REPORTING

4.1 Suppliers shall **report on the rate they are using up resource on a bi-weekly basis**, and immediately flag up to the IPA if the rate exceeds that which was anticipated, or which puts any of the key deliverables at risk of not being delivered on time.

5. CONTINUOUS IMPROVEMENT

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

5.2 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.

6. QUALITY

6.1 Deliverables from work packages 1, 2, 4, 5 and 6 will be published on gov.uk. These deliverables should be written in plain English and the quality must be in line with the rest of the IPA's published materials, such as the Annual Report and the Project Delivery Functional Standard. The IPA Brand Guidelines must be adhered to throughout.

6.2 The **deliverable from work package 3 will be an internal document, not for publication, but also still be written** in plain English in a format that is suitable for Project Board-level circulation.

7. STAFF AND CUSTOMER SERVICE

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

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

7.3 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.

8.   SECURITY AND CONFIDENTIALITY REQUIREMENTS

8.1   Suppliers will not need any specific security requirements, but will be required to sign a non-disclosure agreement stating that any information provided or accessed will remain private between customer and supplier.

8.2   The intellectual property of the refreshed Routemap materials will belong to the IPA in perpetuity, however collaborating suppliers will be credited in the materials.

9.   CONTRACT MANAGEMENT

9.1   Attendance at contract review meetings and reporting will be agreed upon entering into contract.

9.2   Attendance at Contract Review meetings shall be at the Supplier's own expense.

10. LOCATION

10.1 The IPA is currently working remotely, with the expectation that this will continue for the foreseeable future, and therefore there will be no particular physical location for this work to take place. We will not be paying any expenses for travel or subsistence for any suppliers, whatever the reason.

10.2 IPA uses Google Meets for its virtual meetings, and we expect for Suppliers to be able to use this for any meetings with IPA.