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## **1. INTRODUCTION**

Pension Wise is a government service launched in April 2015, on the back of the substantial changes to pensions legislation in the UK. Pension Wise aims to help people aged 50 or over understand what they can do with their pension pot money, specifically with defined contribution pensions (i.e. pensions based on how much has been paid into the pot).

Pension Wise offers guidance on the Pension Wise website, and via free telephone or face-to-face appointments. These appointments are delivered by impartial, trained guidance specialists. Pension Wise won't recommend companies or tell people how to use their pension pot or invest their money, hence differs from regulated financial advice.

To ensure the service is continuously improved, the Pension Wise team has dedicated user researchers, who use a multitude of techniques for gathering quantitative and qualitative insights about the service. Laboratory-based research is a key part of this, testing either the live website, prototypes, paper-based materials that Pension Wise customers interact with, or testing new content for a guidance appointment.

The requirement we are now seeking to procure is for laboratory facilities to support research between September 2015 and April 2016:

1) Web channel: 16 lab-based user research days in Central London, with each day likely to involve up to 6 participants.

2) Face-to-face and phone channel: 6 lab-based user research days in Central London, with each day likely to involve up to 6 participants.

A total of 22 separate user research days.

## **2. PURPOSE**

The research laboratory facilities will be used for conducting qualitative research. For the web channel of Pension Wise, research takes the form of one-on-one, hour long interviews. For the face-to-face and phone channel, a guidance session will take place in the laboratory.

In both cases, the qualitative data gathered will enhance our understanding of how people use Pension Wise, the effectiveness of our service measured against our key performance indicators, and allow us to test and improve new tools and content before launching them to our entire customer base.

## **3. BACKGROUND TO THE AUTHORITY**

HM Treasury is the government's economic and finance ministry, maintaining control over public spending, setting the direction of the UK's economic policy and working to achieve strong and sustainable economic growth.

#### **4. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**

This requirement is needed because continuous research across all Pension Wise channels (web, face-to-face, phone) is crucial for ensuring service quality and for service improvement.

#### **5. SCOPE OF REQUIREMENT**

The laboratory space is required to be in Central London, within easy access of the main HMT office in Westminster.

The lab facilities must provide:

- Reception staff to welcome and assist participants
- Reception staff to ensure that participants (recruited via a dedicated recruitment agency) sign relevant paperwork (confidentiality/non-disclosure agreements)
  - On-site viewing facilities for additional team members to observe all research activities (room to fit at least 8 people). We prefer a room elsewhere in the same location with a remote video/audio feed to a one-way mirror setup.
  - A meeting room near the lab and viewing facilities (for testing phone guidance sessions)
- Computers to use in the testing room, with desktop monitor, mouse and keyboard. The computers need to have internet access, and run the Chrome, Internet Explorer and Mozilla Firefox browsers.
- Wifi in both testing and observation rooms
- Session recordings covering all on-screen activity
- Picture in picture of participants on all session recordings
  - Session recordings in .mp4 or .mov format
    - Session recordings of sufficient quality to use in conference presentations
      - A document viewer (the ability to broadcast paper documents by camera to the viewing room, and to include in the video session recordings)
      - Landline telephone in the lab (for research tasks involving phone calls)
- The ability to broadcast use of tablet and mobile devices to the viewing room (preferably by camera rather than wireless screening of the screen so that we can see fingers interacting with touchscreens)
- Refreshments for participants and observers
- Male, female and accessible toilet facilities
- Optional but highly desirable: eye-tracking facilities
- Optional: remote live viewing for team members who cannot attend the sessions in person

- 5.1 Research is conducted every second Tuesday. The research lab should be available to book for alternate Tuesdays as soon as possible upon award of the contract, with flexibility to change lab days with 1 weeks' notice.

**6. SERVICE LEVELS AND PERFORMANCE**

The Authority will measure the quality of the Supplier's delivery by:

- Ensuring that they provide the facilities that have been booked as per the specification.
  - Provision of the session recordings within 1 day
    - Facilities should be clean and reasonably comfortable
- The Authority also expects the supplier's staff to be courteous and professional at all times when dealing with users and with the team carrying out the research

**7. ADDITIONAL REQUIREMENTS**

The Authority will contact the winning supplier on completion of this procurement to ensure that sessions are booked and held in the lab calendar.

Purchase orders will be raised to cover this requirement. **Invoices are to be raised monthly in arrears. It is HMT policy to pay suppliers within 30 days of receipt of a valid invoice.**

**8. LOCATION**

The location of the services will be carried out at the premises of the winning supplier for this contract for lab facilities.

**9. SECURITY REQUIREMENTS**

Research labs should comply with relevant Data Protection and ethical standards.

**10. BUDGET**

Prices should be inclusive of expenses and exclusive of VAT.