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**Invitation To Tender (ITT)** – Procurement of a supplier to provide a specialist Management Information System for a project aimed at Young People who are NEET or at risk of NEET.

**LEP Area:** Heart of the South West

**ESF Investment Priority:** 1.4 – Active Inclusion

## 1. Introduction

CSW #Focus5 project for the Heat of the South West has been successful in being granted a delivery and funding extension. #Focus5 is a delivery partnership project funded by the European Social Fund and The National Lottery Community Fund. It supports young people who are not in education, employment or training (NEET) or are risk of becoming so. The underlining philosophy of the project is to develop the above demographic to grow and nurture '5' key skills identified by employers as being gateways to employment; Communication, Customer Service, Organisation, Problem Solving, Teamwork.

There are four main outcomes of the #Focus5 project:

1. Young people will better understand the key skills employers look for and improve their readiness for employment and/or training.
2. Young people will have improved strategies for identifying and seeking help to removing barriers to employment and/or training.
3. Young people will have increased self-awareness and an understanding of their own strengths, aptitudes and potential to achieve their goals.
4. Young people will have the confidence, resilience and skills, including digital skills to apply for and secure work/learning/volunteering.

The #Focus5 project provides unique, flexible, one-to-one support to young people aged 15-18 across Devon, Plymouth, Torbay and Somerset, who may be struggling to move forwards in life.

Key to the success of the programme will be to enable the collection, collation, storage and reporting of participant data, contract compliance evidence and associated metrics.

Document: CSW Group Limited – #Focus5 Round 2 System Spec - Final  
Author: S Colgate/N Dunn  
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Intended Audience: Suppliers  
Release Control: CSW - INTERNAL



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As part of the process CSW Group are now testing the marketplace to identify and evaluate suitable system solutions.

The contract will cover the remainder of the project lifecycle, which is 2.5 years. As an indication, we are looking for proposals at the value of approximately £10,000.00 per annum (inclusive of VAT) + any relevant set-up fees. Applications will have to be designed around the available funding and will be taken into consideration when scoring each application.

## 2. The Process

The end-to-end procurement process has been designed to be aligned with CSW Group Limited's Procurement Policy and National and ESIF procurement rules. This ITT will be open for 31 working days from **25/11/2019**.

Suppliers who wish to participate in the #Focus5 project will need to provide a proposal (based on the information detailed below within this documentation) by **23:59 on 10<sup>th</sup> January 2020\***. Proposals will need to be sent to the provided e-mail address below:

**focus5accounts@cswgroup.co.uk**

However, should you have any questions prior to providing the quote you can use either the email or mobile number below. Please note we may not be able to provide an answer to any questions immediately but will come back to you within 2 working days.

**Contact:** focus5@cswgroup.co.uk

**Mobile:** 07818 095275

**\*Late applications will not be accepted after the closing date.**

**Friday 10<sup>th</sup> January 2020**

We will then look at all responses and come back to you with any additional clarification points on the quote.

**Tuesday 14<sup>th</sup> January 2020**



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The assessment of tender applications will be carried out by the assigned Procurement Panel for this tender.

**Tuesday 21<sup>st</sup> January 2020**

The chosen applicant will be selected, and applicants will be informed whether they have been successful or not.

### 3. Principles

The programme is a funded project until 30<sup>th</sup> September 2022 and indicative costs for the full contract period must be included as part of your response.

The system must be supplied in such a way to ensure CSW Group can achieve the European Funding Principles as defined below:

***The Guide to delivering European funding sets out:***

- the performance management methodologies you will use with partners and how underperformance will be managed
- how you will structure reporting from partners so that you have an up-to-date record of the targets the project is achieving as a whole
- how you will check your targets against the profile for the project so that you can accurately report on your performance
- how you will ensure quality and consistency of data across the partnership, including how participant information will be checked, monitored and stored
- the systems and procedures you'll use for storing and protecting sensitive information, including evidence provided by participants (such as copies of passports)

### 4. Requirements

The organisation selected to develop the system will be required to provide a suitable hosting environment.

The successful vendor must have a proven track record, be suitably qualified and be able to demonstrate a thorough knowledge and experience of developing IT systems for large-scale multiple partner funding programmes, preferably including Department for Work and Pensions and European Social Fund programmes.



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Your application should also include your assessment of the work required and your approach to key tasks, including but not necessarily restricted to:

### **Functional Requirements:**

The system will need the capability to record as a minimum the participant data that is set out in the ESF claim applications and Self-Declared Adjustments Data Schema. Furthermore, the system will need several important features:

- Web based with a range of users.
- The capability to produce standard and ad hoc reports on the data and information held about service users to a high level of granularity
- Deliver robust metrics
- Knowledge Transfer – video tutorial, Training Resources Library, Beneficiary Resources
- The capability to attach documents and other evidence within the system
- The system should include a Business Logic and Rules Layer that is locally configurable to enable data quality management and validation at user level
- Coding, drop-down lists and associated data items should be locally definable and there is an expectation that the system will facilitate low-level configuration and bespokeing to reduce the need for vendor interventions beyond that which is defined within the data schema.
- The system needs to include a module that allows project forms/documentation to be completed and uploaded electronically straight into the system. The module needs to be compatible with tablet and/or mobile devices.

### **Technical Requirements:**

- Approximately 30 system users with a mixture of write access and read only access.
- Mobile optimised website and / or app for mobile use
- The system can be accessed from any machine and is fully zero-client meaning that no footprint is left on the machine used to access the system. This enables the system to be accessed from any machines with access to a supported browser, enabling a more flexible working environment
- Data to reside in the EU, preferably the UK in accordance with industry standard ISO 27001. Personal data shall be processed fairly and lawfully
- Flexible licensing with option to consider concurrent or enterprise arrangements
- Inclusion of a role-based security system
- Facility of multi-channel communication, host customer documents, customised dashboards and a voice within the development of the product



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- There will be a data migration required from an existing system

- Consideration for systems, features and functionality that will enable system integrations, push-pull capabilities and data transfers

This list should not, however, be viewed as exhaustive and sets out the minimum functionality we would expect from the system. You should use your expertise in this area to develop your proposals and quote, including identifying any other facets of the brief which are, in your experience, necessary to provide the appropriate level of service to CSW Group and its partners

More information on the National Lottery Community Fund data schema (Annex L and Annex M) can be found at:

<https://www.tnlcommunityfund.org.uk/funding/programmes/building-better-opportunities/guide-to-delivering-european-funding>

## 5. Backup, Data Recovery and compliance with DPA 2018 (GDPR)

Any solution must provide comprehensive backup and DR capabilities and the supplier needs to evidence robust policies and procedures that meet CSW Groups organisational requirements. CSW Group will require sight of appropriate documentation that will provide the assurances of certification of the data centre and hosting management arrangements.

The system will need to support full compliance with the Data Protection Act 2018, with due regard to Department for Work and Pensions as the Data Controller. The successful supplier is required to demonstrate both how their organisation and their software will enable CSW Group to meet these requirements.

By the end of the project (30<sup>th</sup> September 2022) all project data needs to be extracted and stored securely as per the terms set out by the ESF. The applicant will need to include a project closure/data extraction plan and disclose the fees associated with it.



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## 6. The Supplier

- The supplier needs to be a demonstrably accredited partner or equivalent for the solution provided
- All support staff must have the relevant training, certifications and qualifications to fully support the solution
- It is expected reference sites of prior similar installations can be provided
- Development costs and timescales should be clearly documented with all costs itemised
- Support costs should be outlined for the whole duration of the contract
- The system must be suitable, flexible and adaptable when a local customisation is required that doesn't need vendor input for all changes.
- Must have a security first approach to deployment & operation balanced with effective user experience.
- The names, addresses and contact points for at least 3 organisations for which you have recently acted/are currently acting in a similar capacity and which may be approached for references.
- Full life cycle costs should be quoted based on your estimate of the amount of support required to meet our expectations as set out in section 3 of this document.
- Details of the staff to be employed on this assignment should be given, together with their hourly rates and estimated time inputs.
- CSW Group considers experience an important quality and will have due regard to this in making its selection. The experience of the firm is important, but it is also recognised that the firm's experience is vested in individuals. It is important that staff to engaged on the project are of suitable seniority and experience appropriate to their anticipated roles.
- The appointed company will be required to provide evidence of appropriate professional indemnity insurance
- Details of all anticipated disbursements and expenses should be set out, together with details of cost-control mechanisms
- The contract will commence on the proposed date, which is expected to be on 1<sup>st</sup> April 2020
- The contract will be supervised by CSW Group's Information Systems Relationship Manger, Nik Dunn, who will be the principle contact throughout the contract. Initial instruction for the successful supplier will be the #Focus5 Project manager, Nee Bedford.
- You are required to declare any assumptions you have made in preparing your quotation
- In inviting proposals for this work, CSW Group does not bind itself to accept the proposal, or future tenders to the lowest, or indeed any, tender and will not be liable to reimburse any of your costs incurred in bidding for this work whether abortive or otherwise