DIGITAL SERVICES RM1043ii CUSTOMER REQUIREMENTS
Digital by Design – System Architecture and Data Quality Discovery Phase

CONTENTS

WHATS INCLUDED

Customer Requirements (this document)
Appendix A   – Award Questionnaire (template to be completed)
Appendix B   – Supplier Pricing Matrix (template to be completed)
Appendix C   – Call-Off Contract (Part A&B) (Customer specific terms)
                 – Call-Off Contract (Part C) (Standard Terms and Conditions)

OVERVIEW

Digital by Design Project Lead:	Steve Skelton and Paul James
Customer:	Stockport Metropolitan Borough Council
Delivery Location:	Stockport, Greater Manchester
Phase(s):	Discovery
Project:	Digital by Design – System Architecture and Data Quality Discovery Phase
Required Capabilities:	Include, but are not limited to: (mark those that apply) ☒ Software engineering and On-going Support ☒ Agile Product Design & Delivery ☐ Front-End Design and Interaction design ☐ Content Design, Editorial and Strategy ☒ System Administrations and Web Operations ☐ User Research (UX Design) ☐ Embedding Agile
Subcontracting Permitted?	☒ Yes ☐ No
Supplier Partnering Permitted?	☐ Yes ☒ No
Contract Charging Mechanism (Discovery Phase):	Fixed Price paid in arears in line with Stockport Council's payment process
Tender Publish Date:	**13/11/2015**
Tender Submission Deadline:	24/11/2015
Proposed length of phase:	6 to 8 weeks
Proposed Commencement Date of Project:	30/11/2015

LOTTING STRUCTURE

The Customer has structured this procurement as follows:

Single Lot	Software engineering and On-going Support Agile Product Design & Delivery System Administrations and Web Operations

TIMESCALES

Stockport Council may change this timetable at any time. The Potential Provider will be informed by email if there are any changes to this timetable.

It is the Potential Provider's responsibility to monitor the online messaging facility (e-Sourcing).

DATE	WHO	ACTIVITY
13/11/15	Stockport Council	**Publish requirements to Potential Providers** Clarification period starts
23/11/15	Potential Providers	**Clarification Question period closes** Please submit all clarification questions by 09:00am on the 23rd of November. Please note that we aim to publish all response to Q&A within 24hrs.
24/11/15	Potential Providers	**Submission Deadline** Potential Provider must upload submission to the eSourcing suite by 14:00pm
26/27/11/2015	Potential Providers & Stockport Council	**Interview and Scrutiny** Face to face interviews based around suppliers capabilities to deliver the Customer Requirements and based on the Award Questionnaire and scrutiny questions.
30/11/2015	Stockport Council	**Award Notification** Publish successful and un-successful Potential Providers.
30/11/2015	Stockport Council	**Expected "Commencement Date" for Call-Off Contract/s**

KEY DELIVERY DATES

We are looking to procure services for the discovery phase of our project. We propose the start date to be the 30th of November. We expect the discovery phase to take place over 6-8 weeks, depending on a negotiated break over the Christmas period. Work would be expected to re-start on the 4th of January.

PROJECT PHASES	START DATE	COMPLETION DATE
Discovery	30/11/2015	Within 6-8 weeks of the start date

CURRENT SITUATION / BACKGROUND INFORMATION

Stockport Council

Stockport Council has 2971 direct employees, and delivers over 400 services to a population of around 286,000 people. It operates within complex regulatory and statutory frameworks, including integration with other public service providers, and has a gross annual budget of circa £235m.

The Investing in Stockport (IIS) Programme

Over the last five years local government has faced significant financial challenges. The Council's budget has significantly reduced with further reductions in funding expected in coming years.

Stockport Council aims to address these financial challenges through its Investing in Stockport Programme. The programme aims to support economic and demographic growth whilst reforming public services over the period 2015-2020. The programme will deliver savings, as well as helping the borough become more economically active, communities more resilient, and individuals more independent. For an initial overview of the programme, watch the Investing in Stockport video.

The Digital by Design Programme

The Digital by Design programme involves significant investment of one-off resources to modernise and reform a range of Council services; its focus is on the provision of information, improved customer contact, online self-service, engagement with communities, and the ability to create a more joined-up view of our customers to provide the right services and business intelligence at the right time.

The intended outcomes of the Digital by Design programme are:

1. To enable the 2015-17 Investing in Stockport savings programme
2. To establish a technology platform to support savings post 2017
3. To improve customer experience of the council and outcomes in the borough

The programme proposes a significant investment in digital technologies and business transformation as an enabler to the Investing in Stockport service reform projects. A wide range of technologies will be implemented over a two year period, supporting systems integration and service redesign. The aim is to release functionality to the public as soon as it is viable, and then to continuously improve in conjunction with users. The vision is that this enhanced technological capability and the accompanying change will support a shift in our relationship with users enabling services to deliver better outcomes and better value for money.

The funding and a high level implementation delivery plan for the delivery of the programme was approved by the Council's Executive in August 2015. Two high-level implementation plans covering a) a Service Improvement Release Summary, and b) a Capability Solution Delivery

The programme builds on work the council is already committed to through mainstream Information and Communications budgets, and will enable the step change required to meet the scale of the financial challenge over the coming years. Digital improvements have continued apace over the past few months and have continued to deliver significant support to service and organisational change. The detailed Discovery Phase and subsequent development work will build on significant work that has already been carried out by Stockport Council in relation to scoping, designing and implementing its Digital by Design programme.

Approach to digital development and procurement

The council has consciously developed a progressive approach to delivery which recognises the interelationship between service reform, digital development, and technology and procurement choices. There is a spectrum of approaches.
- At one end of the spectrum sits a traditional approach where services are redesigned and adapted on well-established technology solutions currently available within the market.
- At the other end of the spectrum is customer and user based redesign where services can be radically transformed based upon users' needs.

The Council is aiming to adopt an approach that is initially positioned within the middle of this spectrum, whilst endevouring to create the long term conditions to deliver our ambition - to have the capability to develop and deliver radical user-centred services using the most cost effective, agile, and sustainable technology choices at our disposal. At any one time our design and development decisions will be based on balancing the practicalities of meeting urgent need to transform and reduce costs within this long term vision.

In addition the procurement strategy for the Digital by Design Programme aims to promote innovation and social value, to get the most from our investment. One of the ways this could be achieved is through the use of open source solutions. There will be a level-playing field for open source software when technology choices are made, with selections based on agreed criteria including quality and full lifetime costs, ensuring we incorporate Open Source software into the new digital platform where appropriate.

CURRENT ROLES AND RESPONSIBILITIES OF THE CUSTOMER

The team will be comprised of staff from the Council's Policy, Performance and Reform team, Information and Communication Team, and service managers from three of the Council's directorates (Adults', Children's, and Place). The team will expect to work alongside staff from the supplier company to deliver the desired outcomes of the discovery phase. Please see the table below for a description of the team.

Role	Responsibilities
Lead Developer (.net) Jamie Cox	Lead developer
Development Team Manager Bob Mawhinney	Responsible for managing a team of six in-house developers
Programme Manager Emma Collingridge	Programme Manager for the Digital by Design Programme. Responsible for the Programme delivery.
Programme Administration Natalie Harrison	Responsible for programme administration and project support.
Technical Project Manager Paul Garratt	Technical Project Manager for the Digital by Design Programme.
Adults Service Manager Sally Wilson	Head of Business Intelligence and Service Redesign for Adult Social Care.
Children's Service Manager Geraldine Gerrard	Head of Business Services for Children's services
Place Service Manager Claire Grindlay	Head of Business Services for Place services
Corporate and Support Services Andrea Stewart	Head of Business Services for Corporate and Support Services
IIS Programme Leads Amanda Carberry (Children's) Rachel Cobley (Adults') Soulla Jones (Place)	Act as delivery managers for the Council's Investing in Stockport projects
Procurement Officer Carol Callister	Responsible for supporting the programme's procurement process
Website Content Officers Anna Scott and Claudia Lewis	Responsible for the review of the Council website, which includes improving Search Engine Optimisation, Quality Assurance, and drafting a migration process map for web content into a new CMS.
Systems Administrators Range of individual systems administrators	Support the operation of any systems developed, and assist the development team to build software that is easy to operate, scale and secure
Accessibility Leads Alison Blount Stephen Dawson	Responsible for ensuring that the design and delivery of any digital services meets accessibility standards

CURRENT TECHNOLOGIES AND LANGUAGES

Stockport Council has many legacy systems and software, which may have an impact on proposed approaches. The current phase will benefit from the supplier having an awareness of the systems used by the Council's in scope Directorates. Within the scope of this phase, the supplier would be expected to offer advice on work to integrate/replace legacy systems, which would be carried out in subsequent phases. The system architecture and data quality discovery phase will be commissioned alongside a user experience and interaction design discovery phase. As such, this piece of work must be aligned to the user work to provide data requirements, challenge, and to inform any user and technical architecture proposals.

The systems used by the three Council Directorates within the scope of this phase (People, Place and CSS) include: Confirm, Acolaid, APP, Aqua, Care First, SIMS, Theseus, Capita One, Tribal EIS, CCIS, Open Revenues, PARIS, Spydus, Lagan, i-share and Capita One.

The main types of skills held by the Council's technical team include:

- Microsoft .Net framework
- C#
- ASP.net
- Microsoft Server
- Microsoft SQL Server

REQUIRED OUTCOMES

Vision for the Discovery Phase

The discovery phase is required to carry out three deep-dive and three light touch pieces of work, which will result in a more thorough understanding of user requirements and underpinning data and system requirements in multiple service areas within the council. The reform of the following services is central to the IIS savings targets 2015-17 and therefore requires a full discovery phase.

- People Directorate – Children's services - Stockport Family (IIS new delivery model)
- People Directorate – Adults' services – Stockport Together (IIS new delivery model)
- Place Directorate – Public Safety and Protection (IIS new delivery model)

The following services are undergoing less radical reform, but their redesign and incorporation into the council's core digital service offer is seen as fundamental to achieving behaviour change in citizens across the borough. It is assumed that these services will require a lighter touch discovery phase.
- CSS Directorate – Council Tax
- CSS Directorate – Welfare Rights, Information, Advice and Guidance
- Place Directorate – Libraries

An objective of the discovery phase is to combine data analysis, user research and business analysis methods to produce redesigned services that are digital by default. To support this it is expected that the discovery phase will produce actionable user stories that include the necessary data sources and flows. In addition the supplier would be expected to document any universal,

programme level requirements identified during the discovery phase. Data requirements must be user and business focused and informed by regular interaction and prototype testing with key user and stakeholder audiences.

Based on the outputs of the discovery phase, the appointed supplier would be expected to offer advice and guidance in the form of an options appraisal for the Council's future state systems and data architecture, to help to inform the Council's future technical architecture approach. This would include detailed advice on the technical requirements for the corporate Business Intelligence, Data Warehouse, Integration (ESB) and Master Data Management. In addition, suppliers must work closely with the User Experience and Interaction Design Discovery Phase which is being commissioned and delivered in parallel with this work. This project must work with and inform the outputs of the User Experience and Interaction Design Discovery Phase project.

Outputs

Business

- Create a comprehensive current and future state systems and data architecture taking in to account the following key aspects:
    - Quality
    - Security
    - Policies
    - Integration
    - Flexibility
    - Scalability
    - Compliance with legislation
- Document what data is available and how it is being used across the council
- Design the data architecture and provide tools and techniques that will support the Council to:
    - change the decision making culture from 'opinion-based' (I think we should…) to 'data-driven' (I know we should because…)
    - facilitate predictive analytics, targeted information and data sharing
    - Underpin and enable the user stories produced under the User Experience and Interaction Design Discovery Phase project.
- Support and guide the Council's business/data analysts to undertake analytical work and generate new insights
- Throughly document how business processes should operate and be improved under the proposed future state architecture
- Thoroughly capture and document the Council's management information data requirements
- Provide suggested team structure and capabilities required to complete the systems architecture and data quality project
- Create initial prototypes which can be tested with user groups
- Thoroughly capture and document stakeholders' (list to be agreed) views on current services and future requirements
- Develop proposals for achieving a holistic view of the citizen, family and place through the integration of data and records including external and partner organisations' data sources.
- Provide detailed suggestions on scoping and planning the alpha phase
- Facilitate the transfer of skills and knowledge between supplier and Council staff

Technical

- Provide an options appraisal for the future state technology stack explaining how it fits with the Council's business and data needs, to include proposals for:
    - BI – Business Intelligence
    - Data Warehousing including
        - Integration
        - ETL / Staging
        - Data mart
        - Analytical views
    - Integration (ESB)
    - Master Data Management
- Provide input and help to shape the CRM procurement specification, based upon the outputs from the discovery work
- Work closely with the team/supplier delivering the User Experience and Interaction Design Discovery Phase project. Provide verbal and documented input, advice and suggestions with particular focus on the proposed interaction layer technologies (Content Management System, Customer portal, Customer Relationship Management system, and mobile working solutions)
- Investigate and provide options for integration throughout the proposed technology stack to enable the desired shared data and joined records, including the feasibility and cost of API integrations and a good understanding of existing interfaces and systems/data infrastruture
- Provide proposals and guidance with how the Council should develop data matching algorithms
- Provide a documented options appraisal for what analytical software should be used to develop the analytical view and cubes

Required Interfaces

The Digital by Design programme and therefore this procurement sits within the wider Investing in Stockport Programme, we therefore require suppliers to work with project teams within the IIS Programme. There is a requirement to provide reports and monitoring data to groups within this programme's governance structures. The System Architecture and Data Quality Discovery Phase will be commissioned alongside a User Experience and Interaction Design Discovery Phase. As such, this piece of work must be aligned to the user work to provide user requirements, challenge, and to inform any user experience and interaction proposals.

Working Arrangements

It is preferred that suppliers work on premise alongside Stockport Council staff where possible in order to facilitate knowledge transfer. However, other options will be considered where value can be added from a different approach.

Stipulations

The supplier will be required to carry out such investigations and work that will provide the Council with an options appraisal for the next stage of development. It will be at the Council's sole discretion if any of the options presented are pursued, and how the development will be resourced.

REQUIRED CAPABILITIES AND OUTCOMES OF THE SUPPLIER

Required Capabilities and Outcomes of the Supplier	
Capabilities	**Outcomes**
Software Engineering and Ongoing Support	This capability is required to achieve the following outcomes: • Create a comprehensive current and future state systems and data architecture • Define and validate a proposed technology stack explaining how it fits with the Council's business and data needs • Provide input and help to shape the CRM procurement specification, based upon the outputs from the discovery work • Work closely with the team/supplier delivering the User Experience and Interaction Design Discovery Phase project. Provide verbal and documented input, advice and suggestions with particular focus on the proposed interaction layer technologies (Content Management System, Customer portal, Customer Relationship Management system, and mobile working solutions) • Investigate and provide options for integration throughout the proposed technology stack to enable the desired shared data and joined records, including the feasibility and cost of API integrations and a good understanding of existing interfaces and systems/data infrastruture • Create initial prototypes which can be tested with user groups • Thoroughly capture and document the Council's management information data requirements • Facilitate the transfer of skills and knowledge between supplier and Council staff

Agile Product Design & Delivery	This capability is required to achieve the following outcomes:
	• Manage and oversee the discovery phase
	• Create a comprehensive current and future state systems and data architecture taking in to account the following key aspects:
	    ○ Quality
	    ○ Security
	    ○ Policies
	    ○ Integration
	    ○ Flexibility
	    ○ Scalability
	    ○ Compliance with legislation
	• Thoroughly capture and document stakeholders' (list to be agreed) views on current services and future requirements
	• Provide input and help to shape the CRM procurement specification, based upon the outputs from the discovery work
	• Work closely with the team/supplier delivering the User Experience

	and Interaction Design Discovery Phase project. Provide verbal and documented input, advice and suggestions with particular focus on the proposed interaction layer technologies (Content Management System, Customer portal, Customer Relationship Management system, and mobile working solutions)
	• Document what data is available and how it is being used across the council
	• Design the data architecture and provide tools and techniques that will support the Council to:
	    ○ change the decision making culture from 'opinion-based' (I think we should…) to 'data-driven' (I know we should because…)
	    ○ facilitate predictive analytics, targeted information and data sharing
	• Support and guide the Council's business/data analysts to undertake analytical work and generate new insights
	• Thoroughly document how business processes should operate and be improved under the proposed future state architecture
	• Provide suggested team structure and capabilities required to complete the system architecture and data quality project
	• Provide detailed suggestions on scoping and planning the alpha phase
	• Develop proposals for achieving a holistic view of the citizen, family and place through the integration of data and records including external and partner organisations' data sources
	• Facilitate the transfer of skills and knowledge between supplier and Council staff

System Administration and Web Operations	This capability is required to achieve the following outcomes: • Provide proposals and guidance with how the Council should develop data matching algorithms • Provide a documented options appraisal for what analytical software should be used to develop the analytical view and cubes • Investigate and provide options for integration throughout the proposed technology stack to enable the desired shared data and joined records, including the feasibility and cost of API integrations and a good understanding of existing interfaces and systems/data infrastruture • Create initial prototypes which can be tested with user groups • Provide better understanding of legacy interfaces and infrastructure • Facilitate the transfer of skills and knowledge between supplier and Council staff • Facilitate predictive analytics, targeted information and data sharing

THE METHODOLOGY

It is expected that the discovery phase follows an agile methodology to ensure that products are useable and desirable at early, iterative stages.

Potential suppliers should be aware that it is unlikely that front-line staff will be available to attend workshops or focus groups. Therefore, suppliers will be expected to work around this constraint, and to use creative methods for interacting with staff. Methods for observing genuine on-the-job attitudes and behaviour could include shadowing front-line staff,

It is crucial that suppliers possess an empathetic and sensitive approach when working with teams who could be facing job cuts. Suppliers must ensure that they are able to articulate their methods and desired outcomes sensitively and appropriately.

GOVERNANCE

Executive Governance

Stockport Council operates an Executive governance model. The Council's Executive Members approved the budget for the Digital by Design programme in August 2015, but continue to act as a decision-making body for key decisions within the programme. For non-decision making updates, Executive Members receive progress reports as required at Executive Briefing. The main monitoring body for the Digital by Design programme is the Council's Corporate, Resource Management and Governance Scrutiny Committee (CRMG), for which the programme is required to produce regular update reports.

Corporate Governance

Before decisions for the programme are approved at an Executive level, they are first approved by the Council's Corporate Leadership Team (CLT). CLT comprises the Council's Chief and Deputy Chief Executives, the Chief Financial Officer, and the Corporate Leaders for services to people and place. Forward planning is administrated by the Council's Policy, Performance and Reform team and Democratic Services department to ensure compliance with the Council's corporate and executive governance requirements.

Programme Governance

The Digital by Design programme uses a range of project management approaches, and ultimately falls within the Council's governance structure, as described above. Any potential supplier would be expected to provide information to feed into this process.

TERMS AND CONDITIONS

Please note that Customer specific Terms and Conditions apply to this agreement. Please refer to the Call-Off Contract Part A, for further information. Please note that these terms will supersede the standard terms within Call-Off Contract Part C Call-Off Terms and Conditions

EVALUATION STAGES, MINIMUM PASS MARKS & PRICE EVALUATION

Evaluation will follow the approach below:
- Technical and Cultural evaluation
- Interview and Scrutiny
- Pricing evaluation

MINIMUM PASS MARKS:

In order for Potential Providers to progress they must achieve or exceed the Minimum Pass Mark, as defined in the Award Questionnaire.

Stage 1: Technical & Cultural evaluation	All Potential Providers who achieve the required Minimum Pass Mark for a Lot will be added to the Short List, and will be eligible to continue in the Further Competition.
Stage 2: Interview and Scrutiny of the resources proposed by the supplier	Suppliers who meet the Minimum Pass Marks specified for Part A Supplier Confirmation, and Part B1 Written Submission; will be required to attend Part B2 Interview and Scrutiny on particular question areas (specified within the Award Questionnaire) in order to evidence capability. Supplier resources will be required to respond to the scrutiny questions stipulated within the Award Questionnaire. Each shortlisted Supplier must achieve the Minimum Pass Marks identified in the Award Questionnaire to continue in the Further Competition.
Stage 3: Pricing evaluation	For each Further Competition the Customer has a choice as to how they wish the pricing to be evaluated. In this instance the Customer has specified Combined Evaluation as their chosen price evaluation method. For more information please see the Evaluation Guidance document held on the e-Sourcing suite. Please note that pricing will only be evaluated for those shortlisted suppliers that have met the Minimum Pass Marks for the preceding evaluation stages