

# DIGITAL SERVICES RM1043ii CUSTOMER REQUIREMENTS DS02-Digital by Design User Experience and Interaction Design Discovery Phase

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## 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

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

## LOTING STRUCTURE

|                   |   |
|-------------------|---|
| <b>Single Lot</b> | User Research<br>Front End Design and Interaction Design<br>Content Design, Editorial and Strategy<br>Agile Product Design and Delivery |
|-------------------|---|

## 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                       | <b>Publish requirements to Potential Providers</b><br>Clarification period starts   |
| 23/11/15      | Potential Providers                     | <b>Clarification Question period closes</b><br>Please submit all clarification questions by 09:00am on the 23 <sup>rd</sup> of November. Please note that we aim to publish all response to Q&A within 24hrs. |
| 24/11/15      | Potential Providers                     | <b>Submission Deadline</b><br>Potential Provider must upload submission to the eSourcing suite by 14:00pm   |
| 26/27/11/2015 | Potential Providers & Stockport Council | <b>Interview and Scrutiny</b><br>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                       | <b>Award Notification</b><br>Publish successful and un-successful Potential Providers.  |
| 30/11/2015    | Stockport Council                       | <b>Expected "Commencement Date" for Call-Off Contract/s</b>   |

## KEY DELIVERY DATES

We are looking to procure services for the discovery phase of our project. We propose the start date to be the 30<sup>th</sup> 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 4<sup>th</sup> of January.

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

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## 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 interrelationship 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 endeavouring 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  |
|--|---|
| <b>Lead Developer (.net)</b><br>Jamie Cox        | Lead developer  |
| <b>Development Team Manager</b><br>Bob Mawhinney | Responsible for managing a team of six in-house developers  |
| <b>Programme Manager</b><br>Emma Collingridge    | Programme Manager for the Digital by Design Programme.<br>Responsible for the Programme delivery. |

|   |   |
|---|---|
| <b>Programme Administration</b><br>Natalie Harrison   | Responsible for programme administration and project support.   |
| <b>Technical Programme Manager</b><br>Paul Garratt  | Technical Project Manager for the Digital by Design Programme.  |
| <b>Adults Service Manager</b><br>Sally Wilson   | Head of Business Intelligence and Service Redesign for Adult Social Care.   |
| <b>Children's Service Manager</b><br>Geraldine Gerrard  | Head of Business Services for Children's services   |
| <b>Place Service Manager</b><br>Claire Grindlay   | Head of Business Services for Place services  |
| <b>Corporate and Support Services</b><br>Andrea Stewart   | Head of Business Services for Corporate and Support Services  |
| <b>IIS Programme Leads</b><br>Amanda Carberry (Children's)<br>Rachel Cobley (Adults')<br>Soulla Jones (Place) | Act as delivery managers for the Council's Investing in Stockport projects  |
| <b>Procurement Officer</b><br>Carol Callister   | Responsible for supporting the programme's procurement process  |
| <b>Website Content Officers</b><br>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. |
| <b>Systems Administrators</b><br>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   |
| <b>Accessibility Leads</b><br>Alison Blount<br>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 Children's, Adults and Place 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 user experience discovery phase will be commissioned alongside a system architecture and data quality discovery phase. As such, this piece of work must be aligned to the data work to provide data requirements, challenge, and to inform any data and technical architecture proposals.

The systems within the scope of this phase 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 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 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. In addition the supplier would be expected to document any universal, programme level requirements identified during the discovery phase. User 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, to help to inform the Council's future technical architecture approach. This would include detailed advice on the technical requirements for the corporate Content Management System, Customer portal, Customer Relationship Management system, and mobile working solutions. In addition, suppliers must work closely with the Systems Architecture and Data Quality Discovery Phase which is being commissioned and delivered in parallel with this work. This project must work with and inform the outputs of the Systems Architecture and Data Quality Discovery Phase project.

## Outputs

At the end of the discovery phase, the following outputs are required for each of the service areas described above:

- Provide a thorough, prioritised list of user needs, covering both staff (internal) and customer/citizen (external) needs
- Provide a comprehensive set of Stockport based user stories prioritised in line with business requirements
- Provide suggested team and capability requirements to deliver user and business needs
- Build prototypes which can be tested with user groups
- Provide detailed suggestions on scoping and planning the alpha phase
- Thoroughly capture and document stakeholders' (list to be agreed) views on current services and future requirements
- Provide a thorough report documenting how many Stockport users may need assistance accessing and using digital services, identify what assistance is needed and include proposals on how this could be provided
- Provide a thorough options appraisal for the proposed interaction layer technologies (CMS and Portal) informed by the user research work
- 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 System Architecture and Data Quality Discovery Phase project. Provide verbal and documented input, advice and suggestions with particular focus on the proposed data layer technologies (Master Data Management, Business Intelligence, Data Warehouse and integrations approach)
- Facilitate the transfer of skills and knowledge between supplier and Council staff

## 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 projects within the IIS. There is a requirement to provide reports and monitoring data to groups within this programme's governance structures. The user experience discovery phase will be commissioned alongside a System Architecture and Data Quality Discovery Phase. As such, this piece of work must be aligned to the data work to provide data requirements, challenge, and to inform any data and technical architecture 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   |
| Agile Product Design & Delivery                    | <p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> <li>• Manage and oversee the discovery phase</li> <li>• Provide input and help to shape the CRM procurement specification, based upon the outputs from the discovery work</li> <li>• Provide a thorough options appraisal for the proposed interaction layer technologies (CMS and Portal) informed by the user research work</li> <li>• Document where, how and what data is being used across the council</li> <li>• Support and guide the Council's business analysts to undertake analytical work and generate new insights</li> <li>• Document how business processes should operate and be improved under the proposed future state architecture</li> <li>• Provide suggested team structure and capabilities required to complete the project</li> <li>• Provide detailed suggestions on scoping and planning the alpha phase</li> <li>• Ensure flexibility, scalability and security issues are considered</li> <li>• Facilitate the transfer of skills and knowledge between supplier and Council staff</li> </ul> |
| Front-end Design and Interaction Design            | <p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> <li>• Design and provide products that are useable, desirable, and that respond to user requirements</li> <li>• Communicate scenarios, end-to-end experiences, interaction models and screen designs to stakeholders</li> <li>• Develop and maintain design wireframes, mockups, and specifications as necessary</li> </ul>   |
| Content Design, Editorial and Strategy             | <p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> <li>• Ensure content design is informed by user requirements</li> <li>• Develop a strategy and design for delivering needs-led content</li> <li>• Provide support, tools and techniques to ensure all content is</li> </ul>   |

|                                  |  |
|----------------------------------|--|
|                                  | <p>as simple, clear and accessible as possible</p>   |
| <p>User Research (UX Design)</p> | <p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> <li>• Provide a thorough, prioritised list of user needs, covering both staff (internal) and customer/citizen (external) needs</li> <li>• Provide a comprehensive set of Stockport based user stories prioritised in line with business requirements</li> <li>• Provide a thorough report documenting how many Stockport users may need assistance accessing and using digital services, identify what assistance is needed and include proposals on how this could be provided. Ensure product design is influenced by real user insights</li> <li>• Regular and appropriate engagement with the users within the specified Council directorates in order to thoroughly document a detailed understanding of their unique requirements</li> <li>• Identify and document universal user requirements that could be applied to the Digital by Design programme as a whole</li> <li>• Share information regularly so that the entire multidisciplinary team can iterate and plan work accordingly</li> <li>• Regularly test design approaches and products with users so that they are proven to be understandable and desirable</li> </ul> |

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## 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 & 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.<br><br>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.<br><br>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.<br><br>Please note that pricing will only be evaluated for those shortlisted suppliers that have met the Minimum Pass Marks for the preceding evaluation stages  |