

DIGITAL SERVICES RM1043ii

CUSTOMER REQUIREMENTS

Digital by Design – Outputs for Delivery – Beta 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 – Data Processor Agreement)
- 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):	Delivery
Project:	Digital by Design – Outputs for Delivery – Beta Phase
Required Capabilities:	<p>Include, but are not limited to: (mark those that apply)</p> <input checked="" type="checkbox"/> Software engineering and On-going Support <input checked="" type="checkbox"/> Agile Product Design & Delivery <input checked="" type="checkbox"/> Front-End Design and Interaction design <input type="checkbox"/> Content Design, Editorial and Strategy <input checked="" type="checkbox"/> System Administrations and Web Operations <input type="checkbox"/> User Research (UX Design) <input type="checkbox"/> Embedding Agile
Subcontracting Permitted?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Supplier Partnering Permitted?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Contract Charging Mechanism (Beta Phase):	Capped Time and Materials (with spend tracked, reviewed, and agreed at the end of each sprint)
Tender Publish Date:	24/02/2016
Tender Submission Deadline:	09/03/2016
Proposed length of phase:	6 months
Proposed Commencement Date of Project:	16/03/2016

LOTING STRUCTURE

The Customer has structured this procurement as follows:

Single Lot	<p>Software engineering and On-going Support</p> <p>Agile Product Design & Delivery</p> <p>Front-End Design and Interaction design</p> <p>System Administrations and Web Operations</p>
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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
24/02/16	Stockport Council	Publish requirements to Potential Providers Clarification period starts
08/03/16	Potential Providers	Clarification Question period closes Please submit all clarification questions by 09:00am on the 8 th of March. Please note that we aim to publish all response to Q&A within 24hrs.
09/03/16	Potential Providers	Submission Deadline Potential Provider must upload submission to the eSourcing suite by 14:00pm
10/03/16	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.
11/03/16	Stockport Council	Award Notification Publish successful and un-successful Potential Providers.
16/03/16 or as soon as possible thereafter	Stockport Council	Expected "Commencement Date" for Call-Off Contract/s

KEY DELIVERY DATES

We are looking to procure services for the Beta phase of our project. We propose the start date to be the 21st of March. We expect the Beta phase to take place over at least 23 weeks.

PROJECT PHASES	START DATE	COMPLETION DATE
Inception 1 - Programme support team formation	21/03/2016	Within 1 week of start date
Inception 2/3 – IAG and front door (Website, Portal) and Transactions and end-to-end process automation (two teams working on one programme area)	23/03/2016 or one week from start date	Within 2-3 weeks of the start date

Inception 4 – Customer Services, Single view and case management Solution	13/04/2016	Within 2 weeks of the start date
Inception 5 – Business Intelligence and agile analytics	21/03/2016	Within 1 week of start date
Delivery 2a – IAG and front door (Website, Portal) – Release 2 requirements as agreed in initial scoping (development of backlog and stories) period	13/04/2016	15/07/2016
Delivery 3a - Transactions and end-to-end process automation - Release 2 requirements as agreed in initial scoping (development of backlog and stories) period	13/04/2016	15/07/2016
Delivery 4a – Customer Services, Single view and case management Solution - Release 2 requirements as agreed in initial scoping (development of backlog and stories) period	27/04/2016	15/07/2016
Delivery 5 - Business Intelligence and agile analytics	29/03/2016	02/09/2016
Delivery 2b - IAG and front door (Website, Portal) – Release 3 requirements as agreed in stage scoping period	18/07/2016	02/09/2016
Delivery 3b - Transactions and end-to-end process automation – Release 3 requirements as agreed in stage scoping period	18/07/2016	02/09/2016
Delivery 4b - Customer Services, Single view and case management Solution – Release 3 requirements as agreed in stage scoping period	18/07/2016	02/09/2016

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.

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 Beta phase work will build on significant work that has already been carried during the Discovery phase in relation to user research, 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 has adopted an approach that is initially positioned towards the customer and user based redesign end of the spectrum, whilst endeavouring to create the conditions to fully 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 beta phase. Please see the table below for a description of the team.

Role	Responsibilities
Programme Manager Emma Collingridge	Programme Manager for the Digital by Design Programme. Responsible for the Programme delivery.
Programme Support and Administration Norman King Natalie Harrison Helen Masters	Responsible for programme administration and project support.
Business Project Manager	Business Project Manager for the Digital by Design Programme.
Technical Project Manager Paul Garratt	Technical Project Manager for the Digital by Design Programme.
Information Governance Manager	IG support
Programme Support Workstream Lead Business Analyst	Dedicated support for the programme support workstream outlined in 'Vision for the Delivery Phase'
Workstream Support Product Owner – Customer Services, Single view and case Project Manager – Customer Services, Single view and case Product Owner/Project Manager – Transactions and end-to-end process automation Product Owner – IAG and front door (Website, Portal) Project Manager – IAG and front door (Website, Portal) Content Officer – IAG and front door (Website, Portal) Content Officer – IAG and front door (Website, Portal)	Dedicated support for the workstreams outlined in 'Vision for the Delivery Phase'
Business Analyst x 6	Business Analyst assigned to work across the Digital by Design Programme
Development Team Manager Bob Mawhinney	Responsible for managing in-house developers
Lead Developers x 2	Dedicated lead developers to support the workstreams outlined in 'Vision for the Delivery Phase'

Developers x 10	Dedicated developers to support the workstreams outlined in 'Vision for the Delivery Phase'
Business Services support Geraldine Gerrard Claire Grindlay	Head of Business Services for People Services Head of Business Services for Place services
IIS Programme Leads/Project Managers x 6	Act as project managers for services in Digital by design and delivery managers for the Council's Investing in Stockport projects
I&C Relationship Managers Adam Walker (Children's) Matt Scholes (Adults') Gill Lawton (Place)	IT service relationship managers
Procurement Officer Carol Callister	Responsible for supporting the programme's procurement process
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
Customer Engagement Alison Blount	Customer Engagement Work stream Lead
Organisational Development & Engagement Stephen Dawson Emily Wilson Paul Foote Sarah Burke	Responsible for organisational development activities and engagement opportunities for the programme

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 and solutions on work to integrate/replace legacy systems.

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.

Content management is split across Alterian, WordPress and supplier-hosted CMS systems.

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

- Microsoft .Net framework
- C#
- Java
- ASP.net

- Microsoft Server
- Microsoft SQL Server

The council makes use of internally hosted and supplier hosted databases including: Oracle, Microsoft SQL and Postgres.

There are multiple ETL processes used in the council, including FME and processing of generated reports in csv and excel format.

REQUIRED OUTCOMES

The council has undertaken a discovery to form a high level technical approach. It is expected that this approach will be expanded and further validated by the selected supplier at the start of the delivery. Over the delivery phase the council will be looking to expose existing staff to agile ways of working so that the solution is self-sustaining.

Vision for the Delivery Phase

The Beta phase is required to carry out five streams of work which will enable the programme to build and deliver functionality to multiple service areas within the council. In outline the workstreams comprise:

1. Programme Advisory, which is to include portfolio management and specialist delivery skills.

Technical delivery workstreams

2. IAG and front door (Website, Portal), which is to deliver
 - a. new CMS to publish content for agreed parts and services
 - b. new content published for agreed services
 - c. delivery of transactional processes developed in 3.
3. Transactions and end-to-end process automation
 - a. Maximum automation of an agreed end to end processes for an agreed service areas
4. Customer Services, Single view and case management Solution
 - a. Bespoke views of a citizen record from agreed service areas
 - b. Contact centre replacement
 - c. Core case manage system for non-specialist case management and referral requirements
5. Agile Business Intelligence and Analytics
 - a. automated data retrieval from agreed systems for agreed services
 - b. improved business intelligence service

Outputs from the workstreams

Programme Advisory

- Create, develop and initiate the programme support team within 1 week of the start of the phase
- Create an understanding of how the outputs of the phase will contribute to overall programme benefits
- Produce and validate a comprehensive Beta phase approach
- Complete the backlog tasks from the Alpha phase
- Create initial delivery plan including team required, stakeholder comms, RAIDs
- Establish team practices
- Scope, plan, support and deliver with the council the live phase
- Support the planning and scoping of the next phase of work

Engagement and organisational development

- Work closely with and support Council Staff and External Contractors
- Facilitate the transfer of skills and knowledge between supplier and Council staff

Technical delivery workstream

- Create and develop backlogs and stories within 2/3 weeks of the start of each of the following workstreams
 - IAG and front door (Website, Portal)
 - Transactions and end-to-end process automation
 - Customer Services, Single view and case management Solution
- Develop and deliver MVP for IAG and front door
- Replace the existing CMS with a system which separates content and presentation layers
- Set up an open-source access management solution for internal council data.
- Present content to users using a mobile-first and highly accessible web front end capable of supporting multiple brands.
- Replace customer services solution and enhance existing case management systems using either an open source or appropriate software
- Allow users to self-serve via transactional forms built on top of open APIs
- Expose the council's existing offerings as fully-digital, end-to-end, web transactions built on top of an in-house platform
- Surface internal data to council staff via a web-based user interfaces
- Serve content via a restful API using open standards (e.g. HTTP/S, JSON, XML)
- Expose data from existing systems via a RESTful API using lightweight web services and open standards (e.g. HTTP/S, JSON, XML).
- Create, develop and initiate the Agile Business Intelligence and Analytics workstream within 1 week of the start of the phase
- Create and develop backlog for data pipeline
- Automate and consolidate existing ETL processes and develop a 'data-pipeline' to feed an in-house data-warehouse / data-lake.
- Build internal capability to use analysis tools such as iPython Notebook and Tableau
- Support ongoing Business Intelligence work

This is not an exhaustive list and will be refined and agreed during initial scoping (development of backlog and stories) period.

The technical architecture will be regularly reviewed during the Beta phase and elements could be subject to change as delivery progresses.

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.

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
<p>Software Engineering and Ongoing Support</p>	<p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> • ensures feasibility of technical architecture • ensures consistency in technical architecture and software design • encourages developers to contribute to emerging architecture • represents the councils software and development principles when talking to suppliers • acts as an advocate for the development practice at the council • instills quality in all workstreams • coaches developers to build in quality • carries out manual testing, where necessary • pairs with developers to build automated test suite • helps teams define test strategies • coaches QAs and Developers in their team role • determines overarching test matrices (e.g. supported browsers etc.) • pairs with BAs on defining acceptance criteria, where necessary • pairs, where appropriate, with other engineers or team members to

	<p>deliver working software</p> <ul style="list-style-type: none"> • implements stories within agreed timescales, quality standards and acceptance criteria • applies TDD and test automation • estimates stories • helps the BA to define acceptance criteria • pairs with QA to maintain automated regression suite • resolves issues and fixes prioritised defects • contributes to the emerging architecture highlighting and discussing issues with the team <ul style="list-style-type: none"> • instills quality within project • coaches developers to build in quality • carries out manual testing, where necessary • pairs with developers to build automated test suite • helps teams define test strategies • pairs with BAs on defining acceptance criteria, where necessary • produces test cases and scenarios • conducts exploratory testing • carries out integration testing, using mock interfaces as needed
<p>Agile Product Design & Delivery</p>	<p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> • hold responsibility for the delivery of the overall programme goals • help remove programme wide blockers • manages programme RAIDs • coaches internal capabilities • coaches delivery leads in their team role • triggers or starts dependent deliverables (e.g. communications, procurement etc.) • manages scope on programme level • organises and chairs delivery status and steering committee meetings • regularly reports on programme status to wider audience <ul style="list-style-type: none"> • is accountable for overall delivery of product within a project • plans, organises, leads, and controls work • ensures that the project's deliverables are completed on schedule and with the required quality • identifies and removes impediments/ blockers to team's progress • determines and implements improvements to current practices to improve time to market and cost of development • controls scope • manages risks, issues, assumptions, dependencies related to team's delivery • escalates to the programme manager any issues relating to scope and agree on appropriate action • empowers the team • plans releases and iterations • tracks team's progress towards goals as well as relevant KPIs

	<ul style="list-style-type: none"> • coaches internal capabilities • creates and maintains story pipeline • advises the product owner on story priorities • ensures that all requirements support the delivery of business value, • fulfil goals and objectives, and meet stakeholder needs • understands the business domain, the market and end-user goals • provides story and process visualisation • provides the bigger picture for the team • contributes to sizing of stories (estimation) • helps control scope • breaks down requirements and ensures traceability • provides detailed iterative analysis throughout delivery • measures and evaluates solutions for value and opportunities
Front-end design and interaction design	<p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> • ensures consistent design/ experience across the programme/ whole business • pairs with developers on implementation, where necessary • helps BAs define acceptance criteria
System administration and web operations	<p>This capability is required to achieve the following outcomes:</p> <ul style="list-style-type: none"> • help teams with infrastructure needs if they cannot self-serve • co-ordinate infrastructure and system needs across the council • promote re-use of infrastructure and systems where appropriate (across council) • promote a consistent approach (across council) to configuration management, automation and deployment • pairs with developers on infrastructure stories • coaches council staff in DevOps • represent the councils infrastructure and systems requirements and principles when talking to suppliers

THE METHODOLOGY

It is expected that the Beta phase will follow an agile methodology and complement methodologies used in the development phase to ensure continuous programme delivery.

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