NICVA Northern Ireland Council for Voluntary Action

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INVITATION TO TENDER

Provision of web design and development services for NICVA and integration with relevant back-office systems.

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Approver:	Gary Clarke

1.   Introduction

1.1   NICVA, the Northern Ireland Council for Voluntary Action, is a membership and representative umbrella body for the voluntary and community sector (VCS) in Northern Ireland.

1.2   With over 1,400 member organisations - ranging from household name charities to grass roots community groups - NICVA lobbies and campaigns to advance the interests of the people and communities that its members support. NICVA offers a wide range of practical services, products and support to our members to help them do what they do best - find innovative solutions for social challenges. NICVA is committed to pursuing social, environmental, and economic sustainability as some of its core values.

1.3   NICVA is a registered charity (Charity number: 100012, Company No:NI001792) constituted to support charities in NI and their work for the benefit of people in NI and around the world. To find out more about NICVA and its activities please see www.nicva.org.

1.4   NICVA has a fragmented portfolio of digital products and services and currently has 4 websites:

- NICVA.org: a site providing advice, resources, news and information both to and about the voluntary and community sector in Northern Ireland.
- CommunityNI.org: a platform site for the voluntary and community sector to share news, jobs, events, opportunities and services.
- Grant-Tracker.org: a funding database providing up to date information on funding opportunities for the NI voluntary and community sector.
- Media Connect: a service that connects voluntary and community organisations with journalists and media professionals.

1.5   NICVA is seeking to merge their websites into a new **single website platform** through which NICVA's products and services can be better showcased to both members and non-members. This document outlines the requirements for the development of this website and suppliers are invited to provide detailed costs for delivery of this project.

1.6   Suppliers responding to this invitation to tender are asked to demonstrate how their proposed solutions will deliver a quantifiable benefit to NICVA and can support improved service levels to members and increased revenue to NICVA.

2.   Background and Context to the Web Site Requirements

2.1   NICVA uses a range of communication channels (including its current multiple websites) to engage with organisations as well as providing organisations with a platform to do the same. All NICVA websites, further details below, have been built using Drupal. While there is internal familiarity with the Drupal platform, NICVA is not wedded to this as platform going forward and suppliers are invited to propose the best solution for NICVA following a review of this requirements document. Similarly, NICVA is not wedded to retaining existing business processes.

2.2   NICVA.org has been running for over 20 years and this site primarily provides information on all NICVA events and activities. The website hosts thousands of documents including policy papers, research reports, guidance notes and policies. Much of this content will need to be migrated to any new/updated website with a key goal being to ensure that content is easily categorised (and therefore searchable) and can be archived over time.

2.3   CommunityNI.org has been running for approximately 18 years and offers a free platform for the Voluntary and Community Sector, Public Sector and Private Sector to advertise jobs, events, facilities, and services available and relevant to the VCS in NI. The volume of jobs advertised on CommunityNI.org are a potential, significant income stream for NICVA and one that NICVA needs to capitalise on in the immediate future.

2.4   Grant-Tracker.org has been running for approximately 18 years and is Northern Ireland's leading funding toolkit created to help the Voluntary and Community Sector (VCS) in NI find funding schemes relevant to supporting local projects, keep on top of grant application deadline dates and coordinate funding applications. NICVA wish to integrate Grant-Tracker.org with NICVA.org to make access to Grant-Tracker part of the NICVA membership package and there has been much work completed internally on what a future version of Grant-Tacker should look like with a focus on improving the search and edit functions. NICVA are also aware of the need to provide a payment structure for those organisations who are not NICVA members and or cannot be NICVA members but who want to subscribe to Grant-Tracker.

2.5   Media Connect was created to connect voluntary and community organisations with journalists and media professionals. The website is not currently live but is a key resource that is to be included and folded into the new NICVA website.

2.6   NICVA uses **Microsoft Dynamics** (2023 release wave 1 enabled) as its core CRM solution. The CRM system records all NICVA's interactions with member organisations and participants and allows for

simple automated processes for follow up with participants at any time to determine the impact of the support provided. CRM is central to how NICVA works and, as the CRM is critical to the delivery of its services, integration between the new website and the CRM is an important aspect of this project. It is envisaged that as members (and non-members) use the updated website to engage with NICVA, for example to book training or post job opportunities, that activity will be shared with/passed to the CRM to ensure a '**single view**' of the support and activity of members is maintained and visible from NICVA's core CRM system. It is important to stress that the **NICVA CRM will continue to be the central system and reference point for all interactions with member organisations**. The CRM system will be where key processes (e.g. event bookings and billing, grant tracker subscriptions, membership applications etc) will be managed. The functionality provided by the website therefore does not therefore need to be over-engineered beyond capturing the required information for service requests and the passing of these to the CRM for processing.

2.7   NICVA's key challenge therefore relates to how NICVA can effectively integrate its four websites into one in a way that best meets the needs of NICVA and the organisations it supports.

2.8   As a registered charity NICVA is reliant on generating income to continue its work. NICVA currently uses SAGE 50 as its core financial system and uses STRIPE for payment processing. There is no current integration between the websites and the finance system. Ideally website users should be able to book activities, e.g. training, events etc, and pay for these online at the time of booking i.e. through an integrated payment gateway and/or members have invoices generated on booking of activities. NICVA is content to continue to use STRIPE for payment processing.

2.9   The new site will house a large amount of content and will need to create more intuitive, user-centred ways of displaying and surfacing content and materials, particularly in relation to the merging of our existing websites and services.

2.10   It is anticipated that the new web site will provide a level of content to establish NICVA's legitimacy and to encourage visitors to engage and then deliver meaningful, *current* valued content of relevance to the community and voluntary sector. A powerful, yet easy to use and intuitive search tool combined with well-structured content delivery are essential requirements to ensure website users find content promptly.

2.11   It is recognised that selected content will be for members only as being a (paying) NICVA member gives an organisation preferential access to some NICVA services and products. Structuring content so that it can be made available to members only, is key to ensuring that members see added value for their annual subscriptions.

2.12   NICVA is further developing its online Learner Management System (LMS) – NICVA Academy. Modules are in the very early stages of development and testing. Ultimately NICVA plans to offer a range of free and paid for accredited courses to complement its Training Calendar. The LMS is being developed by Inico Digital and the LMS is based on Moodle (version 4.1). Suppliers are asked to note that the LMS will NOT be incorporated into the new NICVA website, but the new site will be required to link to the LMS.

3.   High Level Project Goals

3.1   Success of this project is of paramount importance to NICVA. Suppliers are expected to work with NICVA to ensure measurable project goals are agreed at the outset of the project and to demonstrate throughout project delivery that achievement of these goals are being actively worked towards.

3.2   To be considered a success this project must deliver:

- A redesigned and developed single integrated website, combining our current multiple sites, that effectively meets the needs of NICVA and its website users.
- Increased revenue generation for NICVA, for example, from:
   - Paid for job advertisements (a significant potential growth revenue area and a high priority for the new website),
   - Increased membership and membership fees (by increasing the value offered to members online),
   - Increased training and event bookings,
   - Increased room/facility bookings,
   - (Paid) Access to grants information i.e. by placing behind registration and login for users from member organisations and charging separately for access by non-members.
- A solution that allows for the easy creation and maintenance of defined and managed user roles and access rights, restricting the information a user can view and the tasks they can perform when logged in (i.e. a member log-in area).
- Successfully migrated data and content i.e. all existing current website content and users migrated to the new CMS ensuring search engine rankings are not impacted and redirecting where necessary.
- Ongoing website compliance to relevant legislation.
- Ongoing security and currency of the website technical solution and platform.
- An easy to use and intuitive experience to website visitors with improved search functionality and navigation, that encourages engagement and repeat visits.
- Integration between the website and:

- the NICVA CRM solution to maintain a single view of activity with members from within the CRM,
- The finance system to ensure payments collected online are transferred to the finance system.
- Meaningful website analytics are available to NICVA management that provide insight on how the website is being used.

3.3 Suppliers are invited to detail their experience of delivering similar projects and how goals established at the outset of the project where demonstrably and successfully delivered by the updated websites.

4. Project Approach

4.1 It is anticipated that this project will progress in two distinct phases. This is to ensure that the selected supplier engages with NICVA and works with NICVA staff to fully understand and build upon the requirements detailed in this document. The two project phases will be:

- **Phase 1: Website design and information architecture definition**. It is anticipated that the chosen supplier will engage with NICVA to review the current websites and build on the requirements detailed in this document to produce a recommended information architecture and website design that meets NICVA's requirements and provides a platform for future development. It is envisaged that the outputs from Phase 1 will include:
  - Confirmation of the content management tool and third-party tools that will form the technical platform upon which the website will be built,
  - Detailed specifications of the key functional components of the website and the proposed order in which functionality will be delivered,
  - A detailed and realistic plan for the delivery of phase 2,
  - Detailed test and content migration plans.
    NB as detailed requirements have been provided in this document it is not envisaged that there would be any significant or material changes to costs because of the design phase. Any changes to costs because of the design phase will need to be justified.
- **Phase 2: Website redevelopment**. The chosen supplier, on successful completion of phase 1, will engage with NICVA to deliver the new website as defined by the outputs of phase 1. It is envisaged that requirements and site delivery/development will be prioritised to ensure delivery of highest priority/most value adding developments early.

4.2 It is envisaged that phase 2 will only proceed on the successful completion of phase 1 with suppliers explicitly accepting this condition

as part of any award of contract. It is anticipated that Phase 1 will be completed in early Q2 2025 with the full project completed by Q3 2025.

4.3   Any response to this Invitation to Tender must explicitly detail the costs for each phase of the project separately.

4.4   NICVA are willing to consider alternatives to the two-phase approach as detailed above but any alternative must be clearly articulated with a sound justification for adopting provided.

5.   Structure of Requirements and Form of Response Required

5.1   The sections of the ITT Requirements Specification detail the specific requirements that suppliers must respond to, to enable an assessment of their capability to deliver the required websites.

5.2   For each line of the Statement of Requirements (SoR), suppliers should indicate how their proposal meets the requirements. The categorisation of requirements throughout this SoR is determined by the associated marking. These markings are defined in Table 1 below:

Table 1: Categorisation Markings

Category	Description
M	Requirements marked "M" in a requirements table represent mandatory requirements that MUST be met by suppliers.
S	Requirements marked "S" in a requirements table represent requirements that SHOULD be met by suppliers.
C	Requirements marked "C" in a requirements table represent requirements that COULD be met by suppliers

5.3   **An ITT - NICVA (Web) Supplier Functional Requirements Response spreadsheet template accompanies this document**. This spreadsheet replicates all the requirements from the ITT – NICVA (Web) Requirements Specification document. This spreadsheet must be completed with your responses to each requirement. Please note that a "Yes/No" answer is not acceptable and will be considered as "non-compliant" when evaluated.

5.4   Suppliers should meet all mandatory requirements relating to the websites/services. Failure to comply with mandatory requirements may lead to a supplier's proposal being discounted from further consideration.

5.5   While every attempt has been made to give suppliers an accurate description of NICVA's requirements, suppliers must form their own conclusions about the methods and resources needed to meet these requirements. No guarantee can be given, and no representation or warranty (expressed or implied) is made as to the accuracy or completeness of the contents of this document. Neither NICVA's nor its advisors shall be under any liability for any error, misrepresentation or omission.

6. Submission and Format of Proposals

6.1 Suppliers must provide a proposal document (N.B. we have not provided a template). This proposal should be in addition to the Supplier Response templates provided. Suppliers must present their proposals in the order detailed in the table below:

Section	Content	Instruction
1.	Management Summary	Suppliers must clearly detail how they will support the realisation of NICVA's project goals.
2.	Approach and delivery methodology for the project.	Suppliers must clearly detail: • the proposed activities and timeline for the two distinct project phases, • the input required from NICVA staff.
3.	Response to the design requirements as detailed in the ITT Requirements Specification.	Suppliers must: • Provide a summary of their approach to website (asset) design, • Provide illustrations of the proposed/required site structure for the website (as required by the ITT Requirements Specification), • Complete the accompanying ITT - NICVA (Web) Supplier Functional Requirements Response template
4.	Response to the functional requirements as detailed in the ITT Requirements Specification.	Suppliers must: • Provide a summary of their approach to website and functional development, • Complete the accompanying ITT - NICVA (Web) Supplier Functional Requirements Response template
5.	Response to the hosting requirements as detailed in the ITT Requirements Specification.	Suppliers must: • Provide a summary of their proposed hosting option, • Provide a summary of the technologies that will be at the core of the hosting solution, • Complete the accompanying ITT - NICVA (Web) Supplier Functional Requirements Response template
6.	Response to the additional requirements as detailed in the ITT Requirements Specification.	Suppliers must: • Provide a clear statement on the IP of the completed website, • Provide a summary on their proposed approach to maintenance and support, • Provide a summary on their proposed approach to training, testing and implementation, • Provide a summary on their proposed approach to data migration,

		• Provide a summary on their proposed approach to risk management and project communication, • Provide a summary on their proposed system documentation and approach to legal compliance, • Detail any limitations on your proposal including any exclusions (I.e. details of any requirements that are excluded from delivery and why), • Provide (as an appendix to their proposal) a detailed project plan and timetable for phase 1 and phase 2 of the project including any proposed key measures of project success and a list of the key outputs to be delivered from each phase of the project, • Complete the accompanying ITT - NICVA (Web) Supplier Functional Requirements Response template.

7.	Project Costs	Suppliers must provide a detailed cost breakdown for the project: This should include:
		• An overall summary of the total project delivery cost and ongoing costs for three years with the option for a further two years.
		• A summary of the supplier's daily rates for all work types/resources (with VAT shown separately, if applicable) for the project work and in the event of further work or changes being required post project completion,
		• Complete the accompanying **ITT - NICVA (Web) Supplier Costs** to provide a detailed breakdown of the effort (I.e. days) required to deliver both phases of the project including:
		  i. Design and information architecture costs
		  ii. Cost of the Content Management System
		  iii. Individual costs for meeting each stated functional requirement (and any others as recommended by the supplier)
		  iv. Any other costs (e.g. project management, testing, content/data migration, updated photography)
		  v. Any ongoing licence and/or subscription costs
		  vi. Ongoing hosting costs
		  vii. Ongoing support charges (if applicable)
		
		NB VAT should be shown separately for all costs.

8.	Company Background	Suppliers should provide suitable background information on their company including:

	and Relevant Project Experience	• Evidence of financial stability, • Details of insurance cover held, • Relevant certifications held, • Any additional information that you deem relevant. Suppliers must provide details of individual and company experience in delivering projects of a similar nature including: • **3 example reference projects** from your portfolio demonstrating your firm's and your individual team members' experience relevant to this assignment from within the last 3 years; and • Details on the proposed personnel who will be involved in the project detailing their qualifications and specific relevant experience. • Any additional information that you deem relevant. NB Experience of delivering similar projects is a key evaluation criterion. Suppliers will be marked down for referring to project experience where the proposed project team members did not participate in the project. **Contact details for each reference project** must be provided and NICVA reserves the right to contact referees to validate project details and experience. Suppliers must provide their explicit consent for this in their submissions.

6.2 Failure to comply with the required format when presenting a proposal may Invalidate the response. Responses *ideally* must not exceed 20 pages (excluding any sample plans, visuals and relevant materials supplied to support the proposal and responses to how each of our requirements will be met).

6.3 Proposals and costs must be valid for 90 days. Suppliers must clearly state their agreement to this in their responses.

7. Evaluation Criteria

7.1   A two-stage process will be used to assess tenders.

7.2   Stage 1 will examine the **experience** of each potential supplier and suppliers must pass stage 1 to be evaluated in stage 2. The criteria to be used in Stage 1 are detailed in the following table:

Evaluation Stage 1: Experience	Mark
Business Suitability: The Supplier shall hold or commit to holding and maintaining minimum insurances necessary to cover their liabilities under this Contract. This will include Professional Indemnity Insurance (£1 million), and where applicable Public Liability (£2 million) and Employer's Liability Insurance (£10 million). Copies of all valid insurances should be provided. Failure to provide these documents may lead to a 'Fail' mark. Additional insurances may be required if awarded.	**Pass/ Fail**
Technical Capacity: Tenderers must agree to meet the general conditions of contract and the specification.	**Pass/ Fail**
Key Personnel Experience: There is clear evidence the proposed project team has relevant project experience gained in the past 3 years. Examples of at least 3 reference projects have been provided and the reference projects are of a similar scale and scope to NICVA's requirements with the key personnel involved. Project descriptions must include: • A project title, • A description of the project (300 words max), • Web URL for the website, • The client the project was delivered for, • The start and end dates of the project, • The objectives and key deliverables from the project (300 words max), • Individual roles and responsibilities of the project team proposed for NICVA (120 words per team member), • The methodology used for project delivery (500 words max), • Contact details for the client the project was delivered for.	**Pass/ Fail**

7.3   Stage 2 will assess the **Quality and Cost evaluation** criteria of the supplier's response. The criteria to be used and the relative score given to each criterion are detailed in the following table:

Evaluation Stage 2: Quality and Cost Criteria	Score
Quality Methodology: Proposed Content Management System and technical solution suitability.	**10%**
Quality Methodology: Website design and information architecture approach.	**10%**
Quality Methodology: Ability to meet stated functional requirements.	**40%**
Quality Methodology: Ongoing support and maintenance.	**10%**
Project Costs: Project costs (phase 1 and phase 2).	**20%**
Project Costs: Ongoing costs.	**10%**
Total:	**100%**

8.   Tender Timetable

8.1   Responses to the tender are required by **no later than 12:00pm on 31st January 2025**. NICVA will accept formal requests for clarifications received **no later than 12:00pm on 14th January 2025**. NB responses to any requests for clarification will be shared with all parties to whom the tender has been issued.

8.2   2 bound copies of the tender response must be marked as commercially confidential and provided along with an electronic copy of the tender response materials. Tenders sent by post should be registered or sent by Recorded Delivery or Datapost. If Tenders are delivered by hand an official receipt should be obtained. NICVA cannot accept responsibility for postal or delivery delays. Late Tenders will not be considered.

8.3   Should it be deemed necessary, following the receipt of tenders, companies may be invited for a clarification interview and presentation. It is anticipated that a decision will be made on a preferred supplier within 6 weeks of tender submissions being received in accordance with the following overall outline timetable:

Activity	Target Completion Date
Release of Tender	w/c 16th December 2024
Deadline for clarifications	12:00pm 14th January 2025
Final responses to clarification requests	20th January 2025
Tender Submission	12:00pm 31st January 2025
Supplier Presentations	Mid-February 2025
Preferred Supplier selected	End February 2025
Contract Finalised	March 2025
Project Initiation	March 2025
Phase 1 Design Completed	May 2025
Phase 2 New website live	Q3 2025

8.4   Required Project Completion Date: Q3 2025.

8.5   Any points of clarification required on this Tender and statement of requirements should be sent by email to procurement@nicva.org.

8.6   All responses to the invitation to tender must be addressed to:

Northern Ireland Council for Voluntary Action
61 Duncairn Gardens
Belfast
BT15 2GB

Tel: +44 (0)28 9087 7777

Electronic copies must be sent to <u>procurement@nicva.org</u>

8.7   Whilst every effort has been made to provide an accurate description of the requirements, tenderers should form their own conclusions about the methods and resources needed to meet these requirements. NICVA cannot accept responsibility for the interpretation of the requirement by the tenderer.

8.8   NICVA is not bound to accept the lowest or any submission in response to this requirements document. NICVA reserves the right, at its sole discretion, to withdraw from this Invitation to Tender (ITT) process at any stage. This ITT does not represent a commitment by NICVA to enter a contract with any one or more tendering parties, nor will NICVA Ltd be liable to reimburse any tendering party for any expense or costs of any nature that may be incurred in the preparation of a response to the ITT or in response to any ancillary requests for information in relation to this process.