

**11 June 2025**

**Invitation to Tender and Specification**

**for**

**Customer Experience Platform (2 lots)**

Skills for Care Ltd Registered Charity number 1079836. Registered in England company no.

3866683. Registered office West Gate, 6 Grace Street, Leeds, LS1 2RP Group VAT no. 135 5383 13

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Skills for Care

West Gate

6 Grace Street

Leeds LS1 2RP

**Specification for Website discovery and first phase technical implementation**

**Information for applicants**

**Background**

Skills for Care is embarking on a digital transformation programme, bringing together sector facing products and services under a single platform. The central point of access for users will be the website which has had several development iterations since its original creation.

To realise our vision, we are procuring 2 separate lots (both can be applied for by the same organisation) to deliver a discovery into how people engage with our services, as well as building the beginnings of our new platform. If applying for both lots, please make it clear which responses are for which lot or provide a separate response for each lot.

**LOT 1 – Digital Discovery**

**Outline Specification/Project Objective**

The project will provide the customer journey design, website standards, and processes for future website development.

The indicative budget for lot 1 is £200,000 inclusive of VAT.

1. **Understanding Current Customers and Customer Base**

Suppliers should conduct user research to:

* Identify and profile key customer segments.
* Map current user journeys, pain points, and unmet needs.
* Analyse existing data sources (e.g., analytics, CRM, surveys) to inform audience behaviours.
* Identify accessibility, language, and digital confidence considerations across user groups.
* Provide recommendations for personalisation or content structuring based on user needs.
1. **Accessibility Standards**

Suppliers must:

* Recommend practical approaches to embedding accessibility into design and content workflows.
* Propose tools or processes for accessibility testing (manual and automated).
* Ensure inclusive design practices that account for a range of cognitive, physical, and socio-economic contexts.
1. **Editorial Standards and Audience Positioning**

Suppliers should:

* Review and assess current content guidelines and editorial tone linked to the key audience segments identified.
* Propose a consistent content strategy that supports multiple audience types (e.g., employers, care workers, policy makers) and aligns to Skills for Care brand values.
* Assess alignment with frameworks such as the **Care Workforce Pathway**, tools like those on workforce planning, data and recommend how content can be tailored or structured to meet its stages.
* Explore how platform content should evolve over time to meet changing user needs.
1. **Process Standards – Content Quality Assurance**

Suppliers are expected to evaluate and recommend processes for:

* Content lifecycle management (creation, review, archive).
* Tagging and categorisation of content for discoverability and contextual relevance.
* Automated and manual link-checking, content relevancy checks, and user feedback loops.
* Integration of CMS workflows with governance and editorial oversight.
1. **Visual Standards – Design and Brand Alignment**

Suppliers must:

* Review and assess existing design system and pattern libraries. Our design system is primarily designed in Figma.
* Recommend how visual identity and brand assets are expressed across digital touchpoints to ensure consistent customer experience.
* Ensure alignment with Skills for Care’s brand values, brand guidelines, accessibility, and usability requirements.
* Define and create reusable design components and how they can be implemented consistently, based on an improved design system.

**Outputs Expected from Discovery Phase**

At a minimum, suppliers should provide:

* A Discovery Report summarising findings, research insights, and recommendations.
* A proposed prioritised roadmap for website development.
* Defined user personas and journey maps.
* Designs and components that will be ready to go into development.

**LOT 2 – Technical design and build of our customer experience platform**

Whilst the discovery work within LOT 1 is proceeding, we wish to speed up the delivery of the platform by establishing the technical architecture to be used, laying the foundations for a new website. It is expected within this package of work to deliver a customer experience platform with log in functionality and replicated functionality of our registered manager membership product.

The indicative budget for lot 2 is £170,000 inclusive of VAT.

**1. Platform Architecture and Technical Alignment**

* Establish the foundational architecture of the customer experience platform.
* Select or confirm technology stack(s), CMS, and identity management tools in line with the Skills for Care Technical Strategy and Discovery Phase recommendations.
* Ensure modular and scalable platform design that enables future extension (e.g. content publishing, dashboards, service transactions).
* Adhere to best practices in DevOps (CI/CD, automated testing, code reviews).

**2. User Registration and Log In**

* Design and implement secure, scalable user authentication, registration, and login processes.
* Support multiple authentication methods (e.g. email/password, potential third-party SSO or federated login).
* Provide features such as password reset, multi-factor authentication, and session management.
* Ensure accessibility and usability of registration and login flows for diverse audiences.

**3. Membership Functionality**

* Develop and configure membership features that:
	+ Capture relevant user attributes and preferences.
	+ Support role-based access and permissions.
	+ Allow users to view and update their profiles.
	+ Provide functionality for managing account settings and communication preferences.

**4. Integration and Data Architecture**

* Design a robust data model to support user and membership functionality, considering future needs (noting that we will be running a separate data strategy project alongside these projects, which it will be expected to be able to change to our data collection requirements over time).
* Ensure secure integration with internal systems (e.g., CRM, LMS, email services).
* Establish APIs or middleware for interoperability with third-party systems or future modules.
* Ensure data is stored securely and in compliance with data protection regulations (e.g. GDPR).

**5. Standards and Security**

* Ensure compliance with WCAG 2.2 accessibility standards in all user-facing interfaces.
* Implement security protocols aligned to best practice standards (e.g. PCI-DSS, ISO27001).
* Ensure data encryption at rest and in transit.

**6. Branding and Visual Consistency**

* Apply visual and branding standards identified in Discovery.
* Deliver accessible, responsive, and brand-consistent user interfaces.

**7. Documentation and Handover**

* Provide full documentation of code, architecture, and configurations.
* Deliver end-user documentation and admin guidance.
* Offer training for internal teams to internal teams to upskill as necessary.
* Provide recommendations for next steps in broader website development.

**Deliverables**

* Secure log in and registration system deployed to production-ready environment.
* Functional membership management module.
* Technical documentation and user/admin guides.
* Source code and configuration repositories under Skills for Care control.
* Maintenance and support proposal (optional or as an add-on service).

**Information for applicants submitting a tender for this project**

* Applicants should answer all questions. An authorised person/director should sign the tender.
* Applicants must not discuss the price with other parties. You cannot claim any monies in preparing your tender from Skills for Care.
* This process will be conducted to ensure that tenders are evaluated fairly to ascertain the most economically advantageous tender.
* By issuing this invitation to tender, Skills for Care is not bound in any way and is not obliged to accept the lowest or any tender.
* Pre-tender negotiations will not be entered into.
* Your response to our requirement will be evaluated as stipulated in the specification.
* Whilst every endeavour has been made to give applicants an accurate description of Skills for Care requirement, applicants should make their own assessment about the methods and resources needed to meet those requirements.
* Skills for Care reserve the right to accept a portion of any tender, unless the applicants expressly stipulates otherwise in their tender. Canvassing will result in disqualification.
* Your response to our requirement will be evaluated under the headings “Evaluation Criteria” and “Detailed Costings” will be weighted on a **60:40 split** between the quality aspects of your quote in the evaluation criteria (60%) and the price (40%).
* All successful Applicants will be required to enter into a formal contract with Skills for Care.
* Skills for Care requires Applicants and contractors to be in good standing with their relevant regulatory authority and we take submission and signature of this document to be an assertion that this is so.
* The closing date to submit this tender is Tuesday 24 June 2025 at 5pm BST. Shortlisted applicants will be notified on Friday 27 June 2025 and will be expected to present their proposal on Tuesday 1 July 2025. Applicants will be informed of the decision to award the contract by Wednesday 2 July. Every effort will be made to adhere to this date, but Skills for Care will not be held liable for any delay due to unforeseen circumstances.
* The expected start date of the project will be Monday 4 August 2025.
* Please contact online@skillsforcare.org.uk with any questions relating to this tender.
* Questions and responses will be issued to all applicants anonymously.

Please complete this form and return it to Skills for Care at (online@skillsforcare.org.uk) by 5PM (British Summer Time) on **Tuesday 24 June.** Late tenders will not be considered.

### Tender

|  |  |
| --- | --- |
| From: |  |

|  |  |
| --- | --- |
| Project Title: | **Customer Experience Platform (Lot 1 / Lot 2)** |

**By signing this form:**

* I/we declare we have not communicated to any other party the amount or approximate amount of the tender price and this is a bona-fide tender.
* I/we declare that we have not tried to obtain or sought to obtain confidential information from an employee or an ex-employee of Skills for Care.
* Skills for Care requires Applicants to be in good standing with their relevant regulatory authority and we take signature of this Invitation to tender an assertion that this is so.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Net** | **VAT @ 20%** | **Total Cost** |
| **The tender is for the sum of:** |  |  |  |

|  |  |
| --- | --- |
| Vat Number (If Applicable) |  |

The tender price is valid until (date)

|  |  |
| --- | --- |
| **Authorised Signatory:**  |  |
| **Name (Block Capitals):**  |  |
| **Position:**  |  |
| **Date:**  |  |

| APPLICANT DETAILS |
| --- |
| **Trading Name:***Please note that this must be the name of the consultant/organisation that will be the contracting party with SfC should this quote be accepted.*  |
|  |
| **Registered Address:** |
|  |
| **Company/charity registration number**  |  | **Unique tax****Reference number****(if sole trader)** |  |
| **Address for Correspondence (if different from above)**:  |
|  |
| Telephone number: |  |
| E-mail: |  |
| **Details Of The Person Who Completed The Tender:** |
| Name:  |  |
| Position: |  |
| Telephone number: |  |
| E-mail: |  |

1 Evaluation Criteria

(Max of 5 points for each question, refer to the marking system in appendix 1)

|  |  |
| --- | --- |
| 1.1 | Please describe your proposed approach to this work, implementation and the methodology to be used. (Criteria Weight 40%) |
|  |

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| --- | --- |
| 1.2 | Please describe your/teams skills and experience and what role and responsibility they will have in delivery of the work. (Criteria Weight 20%) |
|  |

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| --- | --- |
| 1.3 | Please demonstrate your experience and understanding of delivering a website discovery / design and build of a customer experience platform. Please add your comments to demonstrate how you would meet these criteria. (Criteria Weight 30%) |
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| --- | --- |
| 1.4 | Please use this space to tell us about any added value you would bring to this project. (Criteria Weight 10%) |
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| **2 HEALTH AND SAFETY LEGISLATION (if applicable)**  |
| Please provide copies of the following documents and mark them with the appropriate question numbers for easy identification: | Please tick if enclosedü |
| An up-to-date copy (which should be not more than two years old) of your Health and Safety Policy Statement, signed and dated by your Chairperson, or Chief Executive, or Managing Director, or Company Secretary.  |  |
| Details of your safety organisation (structure, roles and responsibilities). |  |

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| **3 INTERMEDIARIES LEGISLATION** |
| In accordance with changes in legislation Skills for Care will identify and determine the employment status of Individuals and Contractors supplying services via a Personal Service Company. Where applicable, Skills for Care will deduct and pay the relevant amounts of income tax and employees national insurance contributions from invoices. For further information regarding this see <https://www.gov.uk/guidance/understanding-off-payroll-working-ir35>Please tick one of the following to determine if the legislation applies:* Individual / Sole Trader [ ]
* Partnership [ ]
* Limited Company (not a PSC) / Public Body / Charity [ ]
* Personal Service Company (PSC) [ ]  **(Tick here if you are the contractor providing services to Skills for Care and owner of the business)**
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| **4 EQUALITY, DIVERSITY AND INCLUSION** |
| It is the policy of Skills for Care to promote equality, diversity, and inclusion throughout all our activities, including those related to supplier selection. We are also required to ensure that we have a supplier chain (including our contractors) that do not obtain benefit in any way from criminal activity including Modern Slavery.**Please complete the following questions:** |
| Has your company, in the last 3 years, been found to be in breach of the Human Rights Act (and/or any UK equality legislation) covering discrimination on the grounds of Disability, Sex, Sexual Orientation, Nationality, Age, Religion or belief by any court, tribunal or hearing or had a notice under such legislation served to you by any law enforcement body OR if your business operates outside the UK, equivalent legislation in another country? | Yes [ ] No [ ]  |
| Has your business, in the last 3 years, been convicted of breaching any other areas of UK criminal legislation or undertaken activities in another country that could place you in breach of UK criminal law? | Yes [ ] No [ ]  |
| **5 MODERN SLAVERY ACT 2015** |
| Please tick the following that apply[ ]  We have an up-to-date Modern Slavery Policy and are committed to eradicating slavery and human trafficking[ ]  We are currently working towards embedding a Modern Slavery Policy in the company and are committed to eradicating slavery and human trafficking[ ]  We are not required to have a Modern Slavery Policy but do agree with the principles of the Modern Slavery Act 2015[ ]  None of the above or not applicable – Please Explain <https://www.gov.uk/guidance/publish-an-annual-modern-slavery-statement> |

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| **6 CARBON REDUCTION POLICY** |
| *In 2019, the UK became the first major economy to adopt a legal commitment to achieve ‘Net Zero’ carbon emissions by 2050. Skills for Care fully support this and are currently implementing a Carbon Reduction policy to be transparent on how we intend to reduce our carbon emissions to zero by 2050.* Please answer the following questions:[ ]  We have a Carbon Reduction Policy and agree with the principles outlined above.[ ]  We are currently working towards embedding a Carbon Reduction Policy and this will be implemented before Click or tap to enter a date.[ ]  We are not required to have a Carbon Reduction policy, but we agree with the principles and endeavour to do everything possible to reduce our organisations carbon emissions. [ ]  None of the above, please explain       |

| 7 | INSURANCE |
| --- | --- |
| 7.1 | Please provide details of all insurance cover currently in force. [If your company’s tender is successful, adequate insurance cover will be required]  |
|  | **Please complete details and indicate the level of cover you have including details of the issuing company, policy number, cover provided and renewal date (and provide confirmation from your broker).** |
| **Company** | **Insurer** | **Policy No.** | **Cover£** | **Renewal Date** |
| Public liability  |  |  |  |  |
| Employer’s Liability |  |  |  |  |
| Professional Indemnity  |  |  |  |  |
| **Professional Indemnity insurance is required for the duration of the contract. It should also provide cover for 6 years after the completion of the contract should any claim arise relating to the work undertaken.** |
| 7.2 | Are there any outstanding claims against you? Please list as appropriate. |
|  |

8 Detailed Costings

|  |  |
| --- | --- |
| **8** | **Detailed costing against activities** |
|  | Proposed Activity *(Please add more rows to this table if necessary)* | Date complete | Net | Vat | Total Cost |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |

Appendix 1 – Scoring Matrix

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| --- | --- | --- |
| Score KeyAssessment | Score | Interpretation |
| Excellent | 5 | Satisfies the requirement and demonstrates exceptional understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value, with evidence to support the response. |
| Good | 4 | Satisfies the requirement with minor additional benefits. Above average demonstration by the associate of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. Response identifies factors that will offer potential added value with evidence to support the response. |
| Acceptable | 3 | Satisfies the requirement. Demonstration by the associate of the understanding and evidence in their ability/proposed methodology to deliver a solution for the required supplies/services. |
| Minor Reservations | 2 | Satisfies the requirement with minor reservations. Some minor reservations of the Applicants understanding and proposed methodology, with limited evidence to support the response. |
| Serious Reservations/Non-compliant | 1 | Satisfies the requirement with major reservations. Major reservations of the Applicants understanding and proposed methodology, with little or no evidence to support the response. |
| Unacceptable/Non-compliant | 0 | Does not meet the requirement. Does not comply and/or insufficient information provided to demonstrate that the associate has the understanding or suitable methodology, with little or no evidence to support the response. |