



# Specification for the provision of IT services to Friends Provident Foundation

June 2019

## Friends Provident Foundation

Friends Provident Foundation (FPF) is an independent charity that makes grants and uses its endowment towards a fair, resilient and sustainable economic system that serves people and planet. We connect, fund, support and invest in new thinking to shape a future economy that works for all.

Since 2004, we've pioneered the creation of fair economy for a better world. Already, we've helped improve access to financial services for people who were once excluded and supported the development of resilient economic communities across the UK. We're a catalyst for wider change, making an impact through continuous experimentation and shared learning. And we do all we can to embody the change we want to see. We invest in great social enterprises and use our money in line with our values.

Tomorrow, we'll continue to fund more new thinking, connect new ideas, invest our capital in line with our aims and values and create better systems so that in the future, the economy will serve both people and planet.

For further information please visit: [www.friendsprovidentfoundation.org](http://www.friendsprovidentfoundation.org)

## Background

The Foundation currently has seven staff, five of whom work on a part-time basis. Staff are based at an office in York but also spend time working remotely. (There is one member of staff who works remotely most of the time.) Staff use individual laptops, with docking stations and monitors provided in the office. The office telephones use a VoIP system and staff have Android Fairphone mobile phones. Staff also have access to four shared iPads. There are nine trustees who use iPads for Foundation business.

FPF has a combination of cloud-based and individually installed office systems to support our operations including:

- Microsoft Office 365: cloud-based shared email, calendars and files;
- Salesforce: cloud-based CRM;
- Website: staff have administrative rights, with remote support from Yoke;
- Slack: cloud-based team communications tool;
- CiviHR: cloud-based HR records and leave logging system;
- Charity Magique: cloud-based risk management system;
- Finance Coordinator: finance system by Data Developments; and,
- AVG Virus / malware cover.

We also use online access to our banks, our pension provider and other relevant organisations.

Our internet service provider, York Data Services, provide broadband and VoIP services to the office building in which we are based.

## Goals for the IT service

We require the following from an IT service provider:

1. advice to ensure that we are optimising our use of current IT packages and identifying any new developments which may assist and/or improve our working practices;
2. a responsive, customer-focused service;
3. the ability to solve IT problems and provide good advice to prevent them from recurring;
4. the ability to communicate well, to help staff to gain a better understanding of the IT systems they are using, with the aim of improving efficiency and minimising problems; and,
5. guidance on best practice relating to IT security.

## Services

We are seeking a full IT support service to cover all aspects of our work, which broadly covers:

- The development and maintenance of appropriate IT facilities for the Foundation, to provide a service fully accessible by staff whilst working at the Foundation's office, at home or on the move; and,
- The maintenance of access to the shared drives for Trustees (occasional basis).

**We require the following to be included in the support we seek:**

### Maintenance

1. The maintenance of Foundation IT systems and related devices;
2. Provision of a prompt response to critical IT problems (within office hours) either by email, Slack or telephone, or in person, logging responses using an agreed system;

3. Regular reviews of hardware and installed software, covering security and other business practices, at agreed intervals;
4. Provision of advice relating to the purchase of any specific hardware required;
5. Dealing with the IT requirements of new staff, including establishing access to the IT systems via laptop, iPad and mobile phone;
6. Support of Trustee activities on the shared drives and the maintenance of the Foundation's iPads and those owned by Trustees;

#### Strategy, advice and communication

7. Advice on the development of appropriate IT strategies, in response to changing technologies (hardware, software and media) and needs, to meet the requirements of the Foundation, along with regular monitoring and review of the effectiveness of these IT strategies;
8. Advice and recommendations on appropriate IT upgrades as required to maintain and improve the effectiveness of IT services;
9. Advice to Foundation staff on compliance issues in relation to IT systems, including security systems;
10. Recommending relevant IT training to staff to meet changing IT needs;
11. Liaising with any Foundation staff on a regular basis on IT matters; and
12. Providing information for the Foundation, relating to the above functions, as requested.

#### Services not provided include the following:

- Holding FPF funds relating to IT services or equipment.

## Tender details

If your firm might be correctly placed to deliver the services outlined, please send a short Expression of Interest, by **12 noon on 8 July 2019** to:

Kate Kendall  
Finance and Operations Manager  
Friends Provident Foundation  
Blake House  
18 Blake Street  
York YO1 8QG  
Telephone: 01904 629675  
[kate.kendall@friendsprovidentfoundation.org.uk](mailto:kate.kendall@friendsprovidentfoundation.org.uk)

We ask that your Expression of Interest includes the following:

- A brief introduction to your business and full contact details;
- Key strengths and relevant expertise, including any experience you have of working with similar organisations or charities;
- Details of how you would approach the task of assessing and managing systems for a new customer, in a manner appropriate to our scale; and,
- An indicative, non-binding cost per hour or the terms on which your services are retained.

All information provided will be treated in accordance with our privacy policy, which can be found on our website: [www.friendsprovidentfoundation.org/privacy-policy/](http://www.friendsprovidentfoundation.org/privacy-policy/).

The Foundation will evaluate the proposals received in terms of:

- fit with the services, maintenance, advice and strategy requirements outlined in this specification;
- knowledge and/or experience of the team;
- ability of the team to deliver;
- value for money; and,
- shared values, including approaches taken towards being a responsible employer, encouraging diversity and working in a sustainable way.

Living Wage: Please note that we are a Living Wage employer and expect all staff associated with this tender to also be paid at or above the Living Wage.

## Timetable

Submission deadline	12 noon on Tuesday 9 July
Interviews	22 July 2019
Contract commences	1 October 2019