Unity Schools Partnership

Invitation to Tender

For

**Helpdesk and RMM System**

*Date: 17/06/2025*

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1. **Important Notices**
   1. Confidentiality

Subject to the exceptions referred to below, the information in this Invitation to Tender (**“ITT”**) is made available by Unity Schools Partnership (USP) (**“the Academy Trust”**) on condition that Suppliers shall:

* + 1. at all times treat such information as confidential;
    2. not disclose, copy, reproduce, distribute or pass the information to any other third person or allow any of these things to happen; and
    3. not use the information for any purpose other than for the purpose of making (or deciding whether to make) a Tender for the Services (as described in further detail in section 2.4 below).

Notwithstanding the conditions referred to above, Suppliers may disclose, distribute or pass information to another person if:

* + 1. done for the sole purpose of enabling a Tender to be made and the person receiving the information undertakes in writing to keep the information confidential on the same terms as set out in this ITT; or
    2. the Academy Trust gives its prior written consent in relation to such disclosure, distribution or passing of information.

The Academy Trust may disclose any information relating to the Tenders to its directors, officers, employees, agents or advisers. The Academy Trust also reserves the right to disseminate information that is materially relevant to the Services to all Suppliers, even if the information has only been requested by one Supplier.

* 1. Conflict of Interests
     1. Suppliers must declare any possible conflicts of interests, known at the time of submission.
  2. Accuracy of information and liability of the Academy Trust and its advisers
     1. The information contained in this ITT has been prepared by the Academy Trust in good faith but does not purport to be comprehensive or to have been independently verified. The Academy Trust does not accept any liability or responsibility for the adequacy, accuracy or completeness of, or makes any representation or warranty (express or implied) with respect to the information contained in the ITT or with respect to any written or oral information made or to be made available to any Supplier or its professional advisors and any liability therefore is hereby expressly disclaimed.
     2. Suppliers considering entering into a contractual relationship with the Academy Trust should make their own enquiries and investigations of the Academy Trust's requirements. The subject matter of this ITT shall only have contractual effect when it is contained in the express terms of an executed agreement.
     3. Nothing in this ITT is, or should be relied upon as a promise or representation as to the future and the Academy Trust does not undertake to provide Suppliers with access to any additional information or to update the information in this ITT or to correct any inaccuracies that may become apparent. The Academy Trust reserves the right, without prior notice, to change the procedures outlined in this ITT or to terminate discussions and the delivery of information at any time before entering into a contract for the Services.
  3. Canvassing
     1. Any Supplier who, in connection with its Tender for the Services:
     2. Offers an inducement, fee or award to any representative of the Academy Trust or any person acting as an adviser to the Academy Trust in connection with the evaluation of Tenders for the Services; or
     3. Does anything which would constitute a breach of the Prevention of Corruption Acts 1889 to 1916 or the Bribery Act 2010, will be disqualified (without prejudice to any other civil remedies available to the Academy Trust and without prejudice to any criminal liability that such conduct by a Supplier may attract) from further participation in the competition for the Services.
  4. Non-collusion

Any Supplier who, in connection with its Tender for the Services:

* + 1. Fixes or adjusts its Tender by or in accordance with any agreement or arrangement with any other Supplier;
    2. Enters into any agreement or arrangement with any other Supplier to refrain from making a Tender or to alter, in any way the content of any Tender to be submitted;
    3. Causes or induces any person to enter into any such agreement as referred to in paragraph 1.4.1 or 1.4.2 above or to inform any other Supplier of the content of any other Tender for the Services;

or

offers or agrees to pay or give or does pay or give any sum of money, inducement or valuable consideration directly or indirectly to any persons for doing or having done or causing or having caused to be done any act or omission in relation to any other Tender or proposed Tender for the Services;

or

communicates to any person (outside its consortium, its professional and financial advisers other than the Academy Trust or any person duly appointed by the Academy Trust) the content of its proposed Tender will be disqualified (without prejudice to any other civil remedies available to the Academy Trust and without prejudice to any criminal liability that such conduct by a Supplier may attract) from further participation in the competition for the Services.

* 1. The Academy Trust's right to reject Tenders
     1. The issue of this ITT in no way commits the Academy Trust to award any contract pursuant to this Tender process. The Academy Trust is not bound to accept any Tender and reserves the right to accept any Tender either in whole or in part.
     2. The Academy Trust reserves the right to reject any or all of the responses received and discontinue the Tender process and/or reject any incomplete or incorrectly completed responses.
     3. Tenders will be checked initially for compliance with the requirements of this ITT and for completeness. Clarification may be sought from Suppliers in order to determine if a Tender is complete and compliant. Tenders that are not substantially complete and/or compliant with the requirements of this ITT may be rejected.
  2. Tender costs
     1. Suppliers shall bear their own costs and in no circumstances whatsoever shall the Academy Trust become liable for any Tendering costs, nor shall the Academy Trust be liable for any loss of profits, loss of contracts or other costs or losses suffered or incurred by a Supplier as a result of that Supplier not being awarded a contract pursuant to this Tender process.

1. **Project Background & Services Required**
   1. Introduction

This ITT sets out the steps the Academy Trust will take to obtain specific information from Suppliers to enable the Academy Trust to select a Supplier to provide the Services it requires.

Bidders must meet all relevant requirements and obligations as set out in the relevant supplier application documents.

The form of the tender must include detailed responses to all section of this ITT in the format requested and within any specified word limits. Bidders should note that any response which does not address all of the requirements set out in this ITT may not be considered as valid.

The tender must include all contract costs for the services described. If the bidder intends to sub-contract part of the service, this must be disclosed and the cost to the Academy Trust included within the tender submission. The Academy Trust wishes to enter into a single contract for the whole of the services provided, any sub-contracts are to be at the risk of the contracted supplier.

* 1. The Academy Trust’s Background

Unity Schools Partnership (USP) is a family of secondary, primary and special schools located mainly in Suffolk, and also on the Essex and Cambridgeshire borders as well as Romford in East London.

We share the same values and face similar issues, while providing a close network of support and challenge. We recognise the unique characteristics of each of the communities we work in and how they are reflected in distinctive school cultures.

Our model is about creating interdependence – schools that are more self-sustaining than stand-alone academies, less dependent than local authority schools and more independent than schools in corporate chains.

We all subscribe to a set of shared values, principles and operational processes that ensure quality education for all our young people. Our central belief is that every young life is special – open to possibility, gifted with the potential to change the world for the better. Our ambition is to unlock the potential of all children, remove the barriers that limit aspiration and ensure that all our children succeed.

This requirement covers 40 schools, including special, secondary and primary, and Unity Schools Partnership, the Multi-Academy Trust Academy Trust, whose Head Office is in Haverhill.

Details of all Academy Trust locations can be found at: <https://www.unitysp.co.uk/our-schools/>

* 1. The Academy Trust’s Systems

The Academy Trust already operates with Academy Trust-wide helpdesk service. Approximately 65 staff operate the helpdesk. There are multiple departments that have their own helpdesk, IT, Finance, HR & Operations (Estates). The Academy Trust would not want staff to be able to see tickets for other departments in case GDPR issues arise. It is hoped that Procurement can also utilise the new system. The contract is likely to be awarded for three years with two options to extend for a further 12 months each.

The Academy Trust has the following systems that has integration with the system

The Academy Trust currently works with the following suppliers:

* PS Financials – finance
* Orovia – budget modelling
* National College – Online Learning System
* Arbor – Pupil MIS
* GovernorHub – Governance portal

We anticipate the chosen supplier using API links to these products to ensure the interfaces between your solution and our other suppliers’ solutions are appropriately robust. The scope of delivery will potentially cover all of USP’s operation with potential to grow in the future.

* 1. Services Required

The Academy Trust wishes to appoint a Supplier to provide the System Requirements as outlined above below.

The solution needs to meet our needs now (based on 40 schools plus HQ/ Satellite offices and associated devices), but it also needs to be able to grow. We need to understand what the capacity of the solution is, and if there is a limit to how many site locations and devices (both infrastructure and end user) it can support.

We need to know the licencing model for the PSA and RMM, we have 64 "tech" accounts in the PSA and that continues to grow as we have more teams using the system, also if there are any limits on these numbers.

* 1. System Requirements Overview

Email support

Send support emails to a designated address. Those emails will then be automatically converted into tickets so agents can benefit from a structured ticketing workflow.

Knowledge base

A knowledge base is a store of common answers and useful articles such as how-tos or best practices. It provides a self-service experience that can improve customer satisfaction and reduce support requests.

Self-service portal

The self-service portal is an intuitive place to submit questions in the form of help desk tickets or get immediate answers via the knowledge base.

Forums and F&Q

Forums are a place for users to ask questions and have them answered by the community.

Reporting and analytics

Help desk software reporting features allow companies to track key metrics such as agent productivity, customer satisfaction, and support costs. Detailed analytics allow for continuous improvement of service quality and efficiency.

Help desk automation

Help desk software can automate common tasks to free up agent time while keeping actions consistent. Automation can close an inactive ticket or alert a manager when a new priority-one issue is created.

Remote Viewing

Remote access to help IT answer quires by viewing the end users computer remotely.

Contracts Database

Space for recording contracts with the ability to link assets against those contracts.

Asset Database

Record all Unity assets including IT equipment. This should link assets against software and contracts.

Asset Discovery

The Asset Discovery tool is designed to automatically detect and monitor devices within corporate networks, ensuring the security of authorized devices and mitigating potential cyber threats. It provides real-time visibility into assets, including their status and compliance, and employs Network Topology Maps for continuous identification and management of network and IoT devices. This functionality aids in visualizing connections and promptly identifying issues.

Endpoint Management

Endpoint Management provides secure and rapid remote access to client devices, facilitating swift issue resolution and minimizing downtime. RMM tools enable engineers to connect to any device globally, utilizing robust remote support tools and an HTML5-based remote control to assist users efficiently without disruption

Remote Monitoring

Remote monitoring in IT helps to prevent downtime by proactively identifying and resolving issues. RMM's provide real-time monitoring of various devices, providing alerts, automated responses, and diagnostic information to streamline troubleshooting and reduce complexities in IT environments

Patch Management

Patch Management is essential for endpoint devices, enabling the configuration, testing, and installation of software updates to maintain security and performance. RMM offers a policy-based patch management service for Microsoft and third-party software, enhancing security and minimizing downtime while automating compliance reporting

IT Automation

IT Automation helps to optimize operational efficiency. It emphasizes the strategic advantage of programmatically offloading routine IT workloads to reduce costs and enhance productivity. This approach allows IT staff to focus on more complex and higher-value service requests. Additionally, the document highlights the importance of centralized, policy-based device management to ensure devices remain secure, patched, and optimized through proactive automation at scale

Software Scripting

RMM tools need to offer a comprehensive suite of automation capabilities designed to accommodate both novice users and those managing extensive device networks. Its dynamic device targeting functionality, combined with a versatile scripting engine, to enable streamlined service delivery through scalable automation. Furthermore, the RMM should provide an extensive collection of complimentary, prebuilt scripts and automation policies to enhance technical support.

Reporting

There is critical importance of reporting on network performance, health, and security. It emphasizes the utilization of RMM's modern, configurable dashboards and reporting capabilities to furnish clients with insights into essential metrics, activity, and status. Additionally. It should have the availability of a robust REST API for further reporting options and integrations.

SIEM protection

RMM should have advanced behavioural analysis to monitor endpoints for crypto-ransomware infections. Upon detection, it automatically alerts users, attempts to terminate the ransomware process, and isolates the infected device to prevent further spread while maintaining communication with the RMM system. This proactive approach should enable technicians to effectively recover the impacted endpoints and restore them to a previous state

3rd Party Integration

RMM and PSA should provide a unified platform characterized by synchronized assets, comprehensive bi-directional synchronization of alerts with tickets, and integrated data reporting. RMM should maintain an open ecosystem that supports out-of-the-box integrations with a wide range of MSP-centric solutions. Additionally, powerful API facilitates should provide further integration into key business systems, thereby streamlining business processes and enhancing data sharing.

* 1. Technical Requirements Overview
* The solution should be delivered via Software as a Service model
* Two-factor authentication should be enforced for all logins/access to the system (especially for any administrative logins)
* Integration with existing Azure/Office 365 logins so the two-factor authentication is the same as that used by staff for Office 365 access
* There should be more than one system environment – one live and at least one test
* Single point of truth for all assets
* They should demonstrate that they have robust policies and procedures for security, data protection and business continuity, and although it is not mandatory, we would like to see that they are adopting some/all of the following security and data protection practices -
* GDPR
* ISO 27001
* Cyber Essentials
* NIST Framework
* Third Party Risk Management (TPRM)

User permissions & access

The RMM and PSA solution needs to be able to support role-based access and administrative permissions across a defined set of locations, ensuring that administrators, support teams and end users only have access defined by their role in our organisation for security compliance.

1. **Contract Conditions and Order for Services**

This section not used.

1. **General Matters and Timetable**
   1. Enquiries and communication

Any questions regarding the interpretation or clarification of this document should be made in writing to Procurement@unitysp.co.uk by 30th June 2025 before 17h00.

All questions submitted will be given full consideration, Unity reserve the right to limit the format, content and timing of responses in any way believed by either party to be appropriate (which includes the right to refuse a response without giving any reason for so doing).

In the interests of fair and open competition we may collate any and all questions and responses and issue them to all bidders and in submitting a question you therefore undertake that you accept this requirement. During the period following submission of the tenders, Unity reserves the right to seek clarifications of any or all aspects of the tenders received.

* 1. Amendments to the ITT

The Academy Trust reserves the right to issue amendments or modifications to this ITT during the ITT stage. Any such amendments or modifications will be notified to all Suppliers and Tenders will be assumed to take account of any such modifications and amendments.

* 1. Procedure for the submission of Tenders

An electronic copy of your full response must be emailed to Procurement@unitysp.co.uk and should clearly reference the title (\_\_\_\_) of this Tender in the subject line and the name of the Bidder submitting the response.

* + 1. The detail in each bidder’s response may be specified in any future contract, therefore bidders should ensure their responses are authorised at an appropriate level which would enable them, should they become successful, to become the subject of a binding contract.
    2. Late submissions may not be accepted.
    3. Suppliers should only include those documents requested and only electronic forms of submission are required. Promotional materials or materials not explicitly requested in the tender process are not required.
  1. Timetable

The indicative timetable for this Tender process is as set out below:

|  |  |
| --- | --- |
| **Target Date** | **Activity** |
| 17th June | Issue ITT |
| 26th June | Deadline for receipt of ITT clarification questions |
| 30th June | Clarification questions answered |
| 15th July, 9am | Deadline for return of ITTs |
| 24th July | Supplier presentations |
| w/c 04th August | Contract Award/Bidders notified of Outcome |
| 18st August | Contract Signed |
| August – October 2025 | Implementation & Training |
| 24th October 2025 | System Go-Live |

Please note that the above timetable is indicative only and may be subject to change. The Academy Trust reserves the right to amend the above timetable by giving written notice to Suppliers.

1. **Tender Submission Requirements**
   1. General

This section provides Suppliers with details of the form and content of Tenders that are invited and sets out the procedural requirements with which Suppliers must comply when submitting Tenders in order for their Tenders to be considered by the Academy Trust.

The Tender and any supporting documentation should be appropriately cross-referenced to this ITT. Tenders should be as clear and concise as possible, in order to enable the Academy Trust to evaluate Tenders in accordance with this ITT. All Tenders shall be submitted in English.

* 1. Content of Tender Submission

All Tenders must consist of the following five items/documents:

* + 1. A copy of the Form of Tender at Appendix 1 signed by the authorised signatory submitting the Tender on behalf of the Supplier.
    2. Completion of the Response Document in Appendix 3.

* + 1. Detailed Written Responses to the Evaluation Questions in the Response Document Appendix 3
    2. Completion of the Pricing Matrix provided in the Response Document in Appendix 3.

No additional background information on your organisation is required nor should be submitted.

Any proposal submitted that does not comply with the above instructions may be disqualified from the evaluation process.

1. **Evaluation of Tenders**
   1. Evaluation for compliance

Tenders will be checked initially for compliance with this ITT and for completeness. Clarification may be sought from Suppliers in order to determine if a Tender is complete and compliant. The Academy Trust reserves the right to reject any Tenders that are not substantially complete and/or compliant with this ITT.

* 1. Evaluation criteria

Tenders for the Services will be evaluated on the basis of the criteria set out below. The Academy Trust has allocated a maximum score or “weighting” for each area as follows:

|  |  |  |  |
| --- | --- | --- | --- |
| **Reference** | | **Weighting** | |
| **Response to pass / fail questions** | | **Pass Fail** | |
| **Appendix 3** |  | Pass / Fail | |
| **Response to Weighted questions** | | **60%** | |
| **Appendix 3** | Technical Questions | 80% |  |
| Social Value | 20% |  |
| **Pricing** | | **40%** | |
| **Appendix 3** | Total Contract Price | 85% |  |
| Ad-hoc fees | 15% | |

Assessment of submissions

**Response to Appendix 3 – Evaluation Questions (60%)**

Each question will be scored from 0-10 based on the criteria below and weighted as described in Appendix 3. The sum of the weighted scores will be the overall score for the Evaluation Questions.

|  |  |
| --- | --- |
| **Response Description** | **Score** |
| An outstanding response. Clear, well-evidenced and possibly in excess of what was specified. | 10 |
| A good response with clear and well-presented elements relating to the Academy Trusts' requirements. | 8 |
| A standard and acceptable response | 6 |
| A flawed response, with few demonstrable elements to commend this to the Academy Trust | 4 |
| A poor response; little to no relevance to Academy Trust's specification or requirements | 2 |
| No response | 0 |

Worked example: if the score awarded on the “Implementation & Project Team” question is 6 compared to a maximum of 10, and the weighting for the question is 20%. The final score for this question will be 12 (6 / 10 x 20) :

Pricing Submission (40%)

The Total Contract Price will be evaluated to calculate the Quantitative score (25% of total score):

* Total Contract Price (3 years) – (85%)
* Ad-hoc fees (f15%)

The Total Contract Price will be made up of the Software as a Service costs (inclusive of license, hosting, annual maintenance, upgrades, ongoing support and backup), service implementation costs, training costs, and any costs relating to third party interfaces.

At Appendix 3 Pricing Matrix, Tenderers are instructed to include all costs in the format provided. The Academy Trust is seeking a fixed fee proposal over the 3-year term of this contract. All costs will be combined into an overall 3-year total and this value will be used for tender evaluation.

The Tenderer with the lowest, validated, sustainable price will be given 100% of the Pricing score. Other supplier’s Total Contract Prices will then be expressed as an inverse proportion of the lowest price. The % weighting for Pricing is then applied to give the score for each supplier’s Total Contract Prices. All bids that are 100%, or more, in excess of the lowest bid shall score a zero for price.

The formula for this calculation is as follows:

***Score***  ***= Total Available Marks*** *x* ***(Lowest Price / Tenderers Bid Price)***

A worked example has been provided below, please note that the figures outlined below are example figures only used to illustrate how the formula is applied:

In response to a criterion worth 30% of the total score, the example Lowest Price is £20,000 and the example Tenderers Bid Price is £30,000.

= 30 x (£20,000 / £30,000)

= 30 x 0.67

= 20.1 (score out of 30, rounded to one decimal place)

Submitted offers in the opinion of the Academy Trust that are unrealistically high or low (in terms of price) may be rejected. Tenderers may be given the opportunity to justify their bid before a Tender is rejected / disqualified.

* 1. Presentations

The highest three scoring suppliers based upon the evaluation of the Written Responses, and the Pricing Matrix, as outlined in 6.2, will be invited to a make a Presentation of their system. The Presentation will take place on TBC (see Appendix 5). In the case that there are equal scoring third place suppliers they shall all be invited to a Presentation meeting.

At the Presentation the supplier will have the opportunity to demonstrate their system/application and answer clarification questions based upon the responses to the Written Responses.  The Presentations should cover the six ‘use cases’ below:

1. How the solution will meet the key requirements of the Academy Trust

For RMM it is as below

1. *Asset Discovery*
2. *Endpoint Management*
3. *Remote Monitoring*
4. *Patch Management*
5. *IT Automation*
6. *Software Scripting*
7. *Reporting*
8. *SIEM protection*
9. *3rd Party Integration*
10. *Role based access*

For PSA please show the following

1. **Email to ticket support for multiple email addresses**
   1. **Closed loop email communication with contacts/users**
   2. Canned/standard notes that can be used
2. **Audit log and trail**
3. Knowledge base built in ticket system
4. **Self-service portal**
   1. **Service catalogue for multiple types of requests**
   2. KB/FAQ suggestions during ticket creation
   3. **Customisable branding (unity colours/logo/URL)**
   4. **Customisable forms with branching**
5. **Reporting and analytics**
   1. **Dashboards**
   2. **Shareable reports (outside of licenced users)**
   3. Templated reports
   4. **Custom reports**
6. **Help desk automation**
   1. **Workflows**
   2. **Auto assignment**
7. **Mobile friendly for technicians and users/customers**
8. **Assets/configurations can be added to tickets**
9. **SSO capability and 2FA protection**
10. **Ticket types**
    1. **Incident**
    2. Request
    3. Problem
    4. Change
11. **Purchase orders**
12. **Ticket completion surveys CSAT**
13. AI assistant
14. 3rd Party integrations options available
    1. **Scheduling with Office Calendar**
15. **Role based access**
    1. **Boards/queues**
    2. **Assignment**
    3. **View/edit access**

The content and quality of the Presentation will not be scored but may enable the reconsideration and re-evaluation of responses to related questions in appendix 3 and relevant Written Responses.

The Presentation will also give suppliers the opportunity to answer questions that clarify responses previously given to the submission.

The outcome of the reconsideration and re-evaluation of the submission responses may result a revision to the total weighted scores initially allocated to the Written Responses. To clarify if something was missing from the initial response but shown in the presentation this will be used to increase the original score.

Appendix 1

Form of Tender

To: USP(the **“Academy Trust”**)

Re: USP Helpdesk ***Tender (UNITHD01)***

Dear Sirs

1. Having examined the Invitation to Tender (**“ITT”**) and having satisfied ourselves as to all other matters relevant thereto, we confirm our Tender for the Services.
2. We enclose our Tender and confirm that these comprise all of the documents required to be submitted in accordance with the matters set out in the ITT. We acknowledge that we are bound by our proposals submitted pursuant to the ITT.
3. We hereby unconditionally and irrevocably offer to undertake the Services requested to be provided and performed under the ITT in accordance with the rates and prices stated in our Pricing Document and that our irrevocable offer to undertake the Services in full alignment with the Specification as detailed in the ITT.
4. We confirm that we are fully conversant with all the ITT documentation and that this Tender is submitted strictly in accordance with the ITT.
5. We agree that this Tender shall remain open to be accepted or not by the Academy Trust and shall not be withdrawn for a period of 1 month from the deadline for receipt of Tenders as set out in the ITT, or such longer period as may be agreed with the Academy Trust.
6. We undertake to execute the Order for Services for the proper and complete fulfilment of the Services, or any part or parts thereof, as you may in your absolute discretion award to us.
7. We agree that we shall commence and undertake the Services when awarded and instructed to do so by the Academy Trust pursuant to the terms of the Order for Services and Contract Conditions.
8. We certify that the details of this Tender and the ITT documentation have not been communicated to any other person or adjusted in accordance with any agreement or arrangement with any other person or organisation.
9. We acknowledge that the Academy Trust is not bound to accept the lowest or any Tender it may receive and reserves the right, at its absolute discretion, to accept or not to accept any Tender submitted prior to any award notice.
10. We certify that we have full power and authority to enter into the Order for Services and to undertake the Services, and that this is a bona fide Tender.
11. We confirm that in submitting our Tender, we have satisfied ourselves as to the accuracy and completeness of the information we require in order to do so (including that contained in the ITT).

Dated this *[Day]* day of *[Date]*

Signed for and on behalf of the Supplier by a duly authorised signatory of the Supplier:

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position/Status: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supplier’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Appendix 2**

**Contract Conditions**



Appendix 3

USP Service Desk Requirements



Appendix 4

**Presentation of the System**

The top three scoring bidders (or four if tightly scored on Unity’s discretion) will be required to make available key members of their delivery team who will be responsible for the provision of the Contract to attend a presentation to be held at the Academy Trust Head Office, Unity Schools Partnership, Homefield Road, Haverhill, Suffolk, CB9 8QP. Tenderers will be given the opportunity to present the functionality of their system by sharing ‘use cases’ for a small number of likely school and central Academy Trust scenarios. Final details of the ‘use cases’ will be shared a minimum of 3 days prior to the presentations, which will be held on TBC.

The presentations should last no longer than 1 hour. A draft outline agenda may be:

1. Academy Trust introduction – 5 mins
2. Supplier introduction – 5 mins
3. Supplier presentation of ‘use cases’ (for example) – 30 mins
4. How the solution will meet the key requirements of the Academy Trust
   1. For RMM it is as below
   2. Asset Discovery
   3. Endpoint Management
   4. Remote Monitoring
   5. Patch Management
   6. IT Automation
   7. Software Scripting
   8. Reporting
   9. SIEM protection
   10. 3rd Party Integration
   11. Role based access
5. For PSA please show the following
   1. Email to ticket support for multiple email addresses
   2. Closed loop email communication with contacts/users
   3. Canned/standard notes that can be used
   4. Audit log and trail
   5. Knowledge base built in ticket system
   6. Self-service portal
   7. Service catalogue for multiple types of requests
   8. KB/FAQ suggestions during ticket creation
   9. Customisable branding (unity colours/logo/URL)
   10. Customisable forms with branching
   11. Reporting and analytics
   12. Dashboards
   13. Shareable reports (outside of licenced users)
   14. Templated reports
   15. Custom reports
   16. Help desk automation
   17. Workflows
   18. Auto assignment
   19. Mobile friendly for technicians and users/customers
   20. Assets/configurations can be added to tickets
   21. SSO capability and 2FA protection
   22. Ticket types
   23. Incident
   24. Request
   25. Problem
   26. Change
   27. Purchase orders
   28. Ticket completion surveys CSAT
   29. AI assistant
   30. 3rd Party integrations options available
   31. Scheduling with Office Calendar
   32. Role based access
   33. Boards/queues
   34. Assignment
   35. View/edit access
6. Academy Trust questions to clarify any open issues from the supplier tender submissions. Where possible a list of the Academy Trust questions will be provided in advance – 10 mins.

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The content and quality of the Presentation will not be scored but may enable the reconsideration and re-evaluation of responses to related questions in appendix 3 and relevant Written Responses.

Item 4. The questions asked in section 4 are those that will help the evaluation team clarify open issues from their detailed review of the submission. The answers to the questions will be used to review, and where appropriate revise, the initial scores given during the main evaluation. The outcome may be a revision to the total weighted score initially allocated to Appendix 3.

Appendix 5

KPI’s

By submitting a response you agree to work to the below KPI’s

|  |
| --- |
| 99.5% uptime service availability |
| Priority 1 first response time (FRT) 15 – 30 minutes and resolution time (TTR) 2 – 4 hours |
| Graduated P2 – P4/5 FRT and TTRs |
| >80% FRT and TTR achievement |
| >85% customer satisfaction |
| – 18.00 Mon – Fri support availability |
| Phone and email support |
| Clearly defined support escalation path/points |