SPECIFICATION: SERVICES

Contract Name:

Project Management Consultant for GL refresh Project

Contract Reference:

P2503-1

**Version: 1.1**

The procurement of a Project Manager to lead on the configuration and migration of Sage X3 to Xero including helping to determine and facilitate the appropriate bolt-ons to make the new GL work to ECITB requirements.

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# Introduction

## About the ECITB

The Engineering Construction Industry Training Board (ECITB) is the employer-led skills, standards and qualifications body for the development of the engineering construction workforce of Great Britain. An arms-length body of the UK Government, the ECITB reports to the Department for Education. Our vision is a trailblazing Engineering Construction Industry where critical infrastructure, energy security and net zero ambitions are achieved.

The ECITB works with employers and training providers to attract, develop and qualify the engineering construction workforce in a wide range of craft, technical and professional disciplines. We invest about £28 million each year to support skills development within the industry.

More information about the ECITB can be found here: [**What is the ECITB? - ECITB**](https://www.ecitb.org.uk/)

# Background

The finance team are currently operating on an on-premises (at our IT partner) general ledger system that does not easily integrate with other IT finance systems. There are also additional costs of running the servers for the finance desktop on top of the monthly support costs. The current system is a full ERP system and is underutilised by the finance team as detailed reporting is extracted from other systems in the business. We Currently have approximately 250 General Ledger codes, looking to streamline to around 100, there are also around 100 sales and purchase invoices a month. We are looking to migrate from this solution and require a Project Management consultant to lead on implementation to the new software.

# Scope of the Contract

The procurement of a Project Manager to lead on the configuration and migration of Sage X3 to Xero including helping to determine and facilitate the appropriate bolt-ons to make the new GL work to our business requirements.

# Requirements

1. Project Management

|  |  |
| --- | --- |
| Requirement | Detail |
| Project Planning and Strategy | Creating a Project Plan, developing timelines, identifying project milestones, and estimating resources required for the project. |
| Audit Checklist | Ensure that the Major IT change evidence is collated and supplied to the NAO as per the supplied checklist. |
| Risk Management | Identifying risks, managing issues promptly to prevent project delays, and implementing contingency plans to handle unexpected disruptions ensure effective project risk management. |
| Monitoring and controlling | Tracking progress with project management tools, adjusting plans as needed to meet deadlines, and ensuring quality control help keep the project on track and meet stakeholder expectations. |
| Stakeholder Management | Regularly reporting project status, progress, and changes while managing stakeholder expectations ensures engagement and satisfaction. |
| Project Closure | Ensuring all final deliverables meet specifications, conducting a post-project evaluation to assess success, and finalizing documentation for future reference complete the project lifecycle. |
| Experience and Qualifications | Demonstrable experience leading similar projects from beginning to end, as well as the relevant Project Management professional qualifications. |

1. System configuration

|  |  |
| --- | --- |
| Requirement | Detail |
| Define Chart of Accounts (COA) | Create a structured list of accounts and assign account numbers based on the template provided by ECITB. |
| Configure Financial Dimensions | Add cost centres, departments, business units, projects and define dimension values and their relationships. |
| Security & User Roles | Define access controls and user permissions. |
| Resolve any issues that may arise in the set up of the Barclays bank feed | ECITB will set up the Barclays Bank feed in Xero, be on hand in case of any issues that arise. |
| Experience and Qualifications | Demonstrable experience leading similar projects from beginning to end, as well as the relevant Project Management professional qualifications. |

1. Migration of the GL – X3 to Xero

|  |  |
| --- | --- |
| Requirement | Detail |
| Extract GL Data | Oversee the smooth extraction of the accounting data from sage x3 ensuring the data is complete and adheres to the requirements set out by the NAO |
| Importing Data into Xero | Oversee the import of the data into Xero ensuring the full and accurate transfer of historical data up to the point of migration. |
| Supporting existing business process from Xero | Ensure that existing business processes upstream and downstream of Xero continue to function and manage any dependencies on these processes. |
| Post migration checks | Using the reporting capabilities of Xero to ensure that the data has been migrated correctly. |
| Oversee the Go live | Ensure that the go live process runs smoothly and no transactions are missed. |
| Experience and Qualifications | Demonstrable experience leading similar projects from beginning to end, as well as the relevant Project Management professional qualifications. |

1. Managing Xero bolt-Ons (selecting and configuring)

|  |  |
| --- | --- |
| Requirement | Detail |
| Help select appropriate bolt-ons to allow the most efficient and accurate workflows. | Examples being purchase invoice approvals and Excel extractions with others to be advised. |
| Help configure agreed bolt-on in conjunction with system configuration | Ensure that the agreed bolt-ons are configured accurately to work with the Xero system. |
| Experience and Qualifications | Demonstrable experience leading similar projects from beginning to end, as well as the relevant Project Management professional qualifications. |

# Service Levels and Key Performance Indicators (KPIs)

### Service Levels:

1. **Project Timeline Adherence** – Ensure the project is delivered on schedule, with deviations managed proactively.
2. **Budget Control** – Maintain expenditure within the approved budget, with any variances justified and approved.
3. **Stakeholder Communication** – Provide timely and clear communication, including weekly progress reports and risk updates.
4. **Risk and Issue Management** – Identify, document, and mitigate project risks, ensuring minimal disruptions.
5. **Compliance and Governance** – Ensure adherence to regulatory, security (per section 10 below), and financial reporting requirements.

### Key Performance Indicators (KPIs):

1. **On-Time Delivery** – Percentage of milestones met as per the project plan.
2. **Budget Adherence** – Percentage of budget variance (+/- X%).
3. **Risk Resolution** – Number of project risks identified vs. resolved within SLA timelines.
4. **Stakeholder Satisfaction** – Feedback scores from key stakeholders and end-users.
5. **Change Request Management** – Percentage of scope changes managed without affecting critical timelines.

# Contract Management and Review

To be mutually agreed with ECITB during initial implementation plan setting.

# Insurance Requirements

* Employers’ liability insurance with cover of at least £5m.
* Public Liability Insurance with cover of at least £1m.
* Professional Indemnity Insurance with cover of at least £1m.

# Environment and Sustainability

# Adherence to ECITB (Engineering Construction Industry Training Board) sustainability guidelines may be required, if applicable. Suppliers will also need to align with the contracting authority’s own environmental policies and processes, including commitments to carbon reduction, responsible e-waste disposal, and sustainable procurement practices. These requirements ensure that the project is managed with a focus on long-term environmental responsibility.

# Health and Safety

# Adherence to industry-specific safety policies, including ECITB health and safety guidelines, may be necessary. Suppliers will also need to follow the contracting authority’s own health and safety policies and procedures, ensuring a safe working environment, risk mitigation in project execution, and compliance with workplace safety best practices. These requirements help maintain a secure and compliant project environment.

# Equality, Diversity and Inclusion

# Adherence to industry-specific EDI policies and best practices may be necessary to promote an inclusive and equitable work environment. Suppliers will also be required to align with the contracting authority’s own EDI policies and processes, ensuring fair treatment, non-discriminatory practices, and active promotion of diversity within the project team and supply chain. These requirements help foster an inclusive and equitable working environment.

# Security

The project manager will need to ensure that all data handling, storage, and access controls align with cybersecurity best practices, including encryption and multi-factor authentication. Additionally, physical security measures may include staff vetting, such as DBS checks or background screening, where applicable. Suppliers will also be required to adhere to the contracting authority’s own security policies and frameworks to ensure robust protection of financial data and systems. The supplier will also be required to sign a Non-Disclosure Agreement (NDA).

# General Data Protection Regulation (GDPR)

Any processor handling personal data on behalf of the contracting authority must adhere to clear data processing obligations. This includes defining the subject matter and duration of data processing, ensuring that personal data is processed only for the nature and purpose specified in the contract, such as financial record management and reporting. The processor must handle specific types of personal data (e.g., employee payroll details, vendor financial information) and comply with protections for all relevant data subject categories. Additionally, the processor must follow the obligations and rights of the data controller, including adherence to GDPR or other applicable data protection laws, secure data handling, and ensuring the right to audit compliance. Suppliers should consult the Director of Legal and Governance for further guidance on these requirements

# Contract Type and Duration

We require a fixed term contract provision for 1 year with an option to extend for a further 1 years at the ECITB’s full discretion for related services.

We envisage the project to run for 6-8 weeks commencing implementation in June 2025. The deadline for go live with our new software, including full implementation, dual running and testing phases is August/September 2025.

The contract of one year with extensions provides the ECITB with the option for additional support under the agreed terms during the first 1-2 years of the software’s use. At the ECITB’s discretion, we may request additional, related services during both the initial term and any optional extension, such as:

1. Implementation of additional bolt-on modules
2. Development of system reporting requirements
3. Additional system and reporting needs in line with business changes, efficiencies and improvement or wider regulation or directives

Any additional services in the initial term (year 1), will be quoted based on pre-agreed rates with the supplier. The supplier should include these rates within its pricing and within the final contract. For the optional extension, rates should be pre-agreed with the ECITB including the scope of services.

The contract should be fixed price in the initial term for the GL project detailed herewith.

Please note, the ECITB payment terms are 30 days from date of invoice.