

Chartered Institute of Environmental Health



Request For Proposal

Tender Name	CRM and Website Consultancy February 2025
Tender Reference	ITT14

1. About CIEH

The Chartered Institute of Environmental Health (CIEH) is the membership and awarding body for the environmental health sector. For more information see www.cieh.org/about-us. We also operate a busy conference centre and events venue in central London. For more information about our venue see www.15hatfields.com.

Our Purpose	To promote all aspects of environmental health for public benefit
Our Vision	Safer, cleaner and healthier environments for the benefit of all
Our Values	<p>Inclusivity - We treat everyone with respect. We welcome difference and hold ourselves and others to account for encouraging diversity of thought and action.</p> <p>Professionalism - We act ethically to deliver on our promises. We expect and support practitioners to consistently apply the skills and behaviours that engender public trust.</p> <p>Partnership - We actively seek ways of working with others who share our values to achieve our purpose.</p>

We are committed to fulfilling our vision and ensuring our values are central to all that we do.

With this in mind, we are asking potential suppliers to provide details of how you will ensure the work is relevant and aligned with the strategic, operational, and value-driven needs of CIEH.

Environmentally friendly and sustainable procurement is extremely important to CIEH's core beliefs and principles. Invitations to tender request that potential providers demonstrate their commitment to environmentally friendly processes.

2. Introduction

Information on the purchase, key elements and key outputs
<p>CIEH implemented its current CRM and website in 2018. Since then, our business needs have evolved, and technology has moved on.</p> <p>To give ourselves the best chance of success we are seeking expert advice on:</p> <ul style="list-style-type: none">• Project structure and scope• Suitable technology partners <p>Your proposal should be detailed enough to allow CIEH to make an informed selection of the most appropriate consultancy to work with. This RFP contains information about the procurement process and the services required.</p> <p>Subject to the terms of this RFP, CIEH proposes to enter into a contract with the successful Consultancy. The initial contract will be for a period to be agreed but likely to be at least three months and no more than 18 months.</p>

The timetable for this process is as follows:	
Initial discussions to confirm interest	Monday 27 January to Friday 31 January 2025
Invitations to tender issued	Tuesday 4 February 2025
Supplier Responses to be received by	Close of business on Monday 10 February 2025
Evaluation period	Monday 10 February – Friday 28 February 2025
Decision announced by	Friday 28 February 2025
Contract start date	Monday 3 March 2025

3. Scope of Works

Specification or scope of works sufficient for a supplier to provide a quotation

The appointed supplier will be responsible for helping CIEH define the requirements for a new CRM and websites, and for managing the procurement process up to the supplier selection. This will include:

1. Discovery & Requirements Gathering

- Conduct a review of our current CRM & website, identifying pain points and limitations.
- Engage key stakeholders (CIEH staff and management) to gather business and functional requirements.
- Identify necessary integrations with existing systems (e.g. Business Central, dotdigital, etc).
- Assess data migration needs from the current CRM, website CMS and any legacy systems.
- Define key success criteria and business objectives for the new CRM and website.

2. Market Research & Solution Recommendations

- Provide an overview of solutions suitable for CIEH.
- Advise on best practices in the membership sector for configuring CRM and website processes.
- Develop a high-level functional and technical requirements document.
- Recommend procurement and evaluation criteria for supplier selection.

3. Procurement & Supplier Selection Support

- Develop tender document(s) for the CRM and website procurement process.
- Assist in managing the tender process, including responding to supplier queries.
- Support the evaluation of tender responses and facilitate shortlisting.
- Provide guidance during supplier demonstrations and selection.
- Assist in finalising the appointment of a CRM supplier.

Once a CRM supplier is appointed, responsibility will transfer to them for system implementation.

4. Exclusions

The key exclusions are:

System Implementation is excluded. We expect this contract to help us cover the work required to identify the best implementation partner to work with. Any further involvement would be subject to a new agreement.

5. Structure of Proposals

Name of the company making the bid & company number	
Registered Address	
<p>Details of your ability to meet each of the requirements of the tender as outlined above.</p> <ul style="list-style-type: none"> • Discovery & Requirements Gathering • Market Research & Solution Recommendations • Procurement & Supplier Selection Support) 	
Details of skills, capacity and experience of those delivering the services.	
<p>Total Price.</p> <p>Please give details of your preferred payment schedule, and any discounts that apply, e.g. for non-profits/charities.</p>	
Please confirm current day rates for additional professional services not included in the contract.	
Details of any other value for money options appropriate to this tender	
Other information relevant to tender proposal	

6. Supporting Information

The key supporting information requirements are:
<p>Please provide:</p> <ol style="list-style-type: none"> 1. Executive Summary, as outlined below – see section 8. 2. References: <u>at least two</u> existing customers similar in size and business to CIEH, who are willing to confirm their positive experience of working with you. 3. Your standard contract for the provision of IT consultancy services. 4. Your contract exit plan explaining how knowledge would be passed back to CIEH at the end of the contract. 5. Your latest two years' audited accounts.

6. Details of the company's ownership including majority shareholders and/or parent companies. If your company is owned by a parent, please provide for both the parent and subsidiary companies.
7. Relevant insurance / indemnity documents.
8. Your policies on Environmental Sustainability.
9. A statement that you are completely independent of any CRM or website provider and have no other potential conflict of interest.

7. Evaluation Criteria

Proposals will be evaluated by a panel of key stakeholders in CIEH.	
Evaluation Criteria	% Weighting
1. The record of the supplier in delivering successful CRM and website consultancy services for organisations which are similar to CIEH in scale, business type and technical maturity.	25
2. Demonstrated understanding of CIEH's current needs and clarity of explanation of services offered.	20
3. Value for money.	30
4. Financial/commercial stability.	10
5. Timeliness and clarity of response and adherence to addressing all requirements.	5
6. Cultural Fit, including environmental sustainability.	10

8. Executive Summary

Each Tenderer must also provide an executive summary of its Tender which includes the following:

- a clear statement of its commitment to meet CIEH's requirements including an outline of the way in which CIEH's requirements are to be met.
- a summary of all the approach offered by the Tenderer in response to the RFP.
- a description of the Tenderer's overall structure including details of the financial standing of the Tenderer
- a summary of the key qualifications, capabilities and strengths of the supplier, including track record and experience in delivery of similar services
- an overview of the Tenderer's overall costs and the proposed pricing, payment and deliverables.
- A clear statement of how Tenderer will ensure the work is relevant and aligned with the strategic, operational, and value-driven needs of CIEH and demonstrate commitment to environmentally friendly processes.

9. Submitting a Proposal

The deadline for receipt of submissions is **close of business on Monday 10 February 2025**. It is the responsibility of the bidder to ensure that the proposal has arrived by the deadline stated.

Any Tender received after the Deadline shall not be opened or considered. CIEH may, however, in its own absolute discretion extend the Deadline, and in these circumstances CIEH will notify all Tenderers of any such change.

The Tender must be clear, concise and complete. CIEH reserves the right to mark a Tenderer down or exclude it from the procurement if its Tender contains any ambiguities or lacks clarity. Tenderers should submit only information that is necessary to respond effectively to this RFP. Unless specifically requested, extraneous presentation materials are not necessary or desired. Tenders will be evaluated on the information submitted by the Deadline.

The proposal should be emailed in PDF format to ITContracts@cieh.org quoting the tender reference ITT14 in the subject.

An acknowledgement of receipt of your bid will be sent to you. If you do not receive such an email it is the bidder's responsibility to contact CIEH to ensure that the bid has been received.

10. Award of Contract

It is anticipated that bidders will be notified of the outcome of this tender exercise by **Friday 28 February 2025**.

It is expected that the consultancy services should commence immediately after that.

11. Further Information

For enquiries regarding this work or the tender process, please contact ITContracts@cieh.org.

Disclaimers and Legal Issues

This ITT and any of the information presented in it does not constitute an offer or invitation on the part of CIEH to enter into the Contract or any other contractual arrangements relating to the services described in this ITT (Services).

The information in this ITT, which does not purport to be comprehensive, has been provided by CIEH and has not been independently verified. While this ITT has been prepared in good faith, no representation, warranty, assurance or undertaking (express or implied) is or will be made, and no responsibility or liability is or will be accepted by CIEH or by its officers, employees or agents in relation to the adequacy, accuracy, completeness or reasonableness of this ITT, or of any other information (whether written or oral), notice or document supplied or otherwise made available to the Tenderers or their advisers in connection with the Services and the Contract.

All and any such responsibility and liability is expressly disclaimed. The recipient acknowledges and agrees that no person has, nor is held out as having, any authority to give any statement, warranty, representation, assurance or undertaking on behalf of CIEH in connection with the Contract.

No information set out or referred to in this ITT shall form the basis of any contract. Any prospective Service Provider shall be required to enter the Contract, acknowledging that it has not relied on to enter into such an agreement by, any representation, warranty, assurance or undertaking save as expressly set out in that agreement.

This ITT does not exclude any liability for, or remedy in respect of, fraudulent misrepresentation.

This ITT should not be regarded as an investment recommendation made by CIEH or its appointed advisors. All suppliers are recommended to seek their own financial and legal advice.

CIEH will not in any circumstances be liable for any Tender costs, expenditure, work or effort incurred by a Tenderer in carrying out enquiries in relation to, proceeding with, or participating in, this procurement, including if the procurement process is terminated or amended by CIEH.

All intellectual property rights in this ITT and all materials provided by CIEH or its professional advisors in connection with this ITT are and shall remain the property of CIEH and/or its professional advisors.

The Tenderer and CIEH shall, at their own expense, ensure that they comply with the requirements of all legislation and regulatory requirements in force from time to time in relation to the use of personal data that is disclosed in, or pursuant to this ITT. "Personal data" is as defined in the General Data Protection Regulation ((EU) 2016/679) (GDPR) and the privacy of electronic communications, including (i) the Data Protection Act 2018 and any successor UK legislation, as well as (ii) the GDPR and any other directly applicable European Union regulation relating to data protection and privacy (for so long as and to the extent that the law of the European Union has legal effect in the UK.

The Tenderer is required to disclose any potential conflicts of interest that may arise in relation to this tender at the earliest possible opportunity. This includes any personal, financial, or professional relationships that could influence or appear to influence the impartiality of the tender process.

CIEH reserves the right to:

- verify information that applicants provide in the Tender and disqualify an application if an error, omission, or mistake is discovered. This applies, no matter what stage has been reached in the tender process
- waive or change the requirements of this ITT from time to time without prior (or any) notice being given by CIEH
- seek clarification or documents in respect of a Tenderer's submission
- disqualify any Tenderer that does not submit a compliant Tender in accordance with the instructions in this ITT
- disqualify any Tenderer or terminate any Contract where there is serious misrepresentation in relation to its Tender, expression of interest or the tender process

- exclude any Tenderers from the tender process who have been found to be in breach of intellectual property rights and data protection obligations and may pursue any remedy or take any other action for breach as it considers appropriate
- withdraw this ITT at any time, or to re-invite Tenders on the same or any alternative basis
- choose not to award any Contract as a result of the current procurement process,
- make whatever changes it sees fit to the Timetable, structure or content of the procurement process, depending on approvals processes or for any other reason
- publish on the website the trading name of the supplier awarded the contract and estimated annual contract value (in £5,000 bands). CIEH will be operating to the principle of transparency first. However, where it is deemed commercially sensitive CIEH will retain the right to withhold the estimated value of the contract.
- Any action CIEH may take (including but not limited to the above) shall be done without incurring any liability to the affected Tenderers

12. Appendix - Technical Environment

Business Systems

Our existing CRM has integrations with a range of other services:

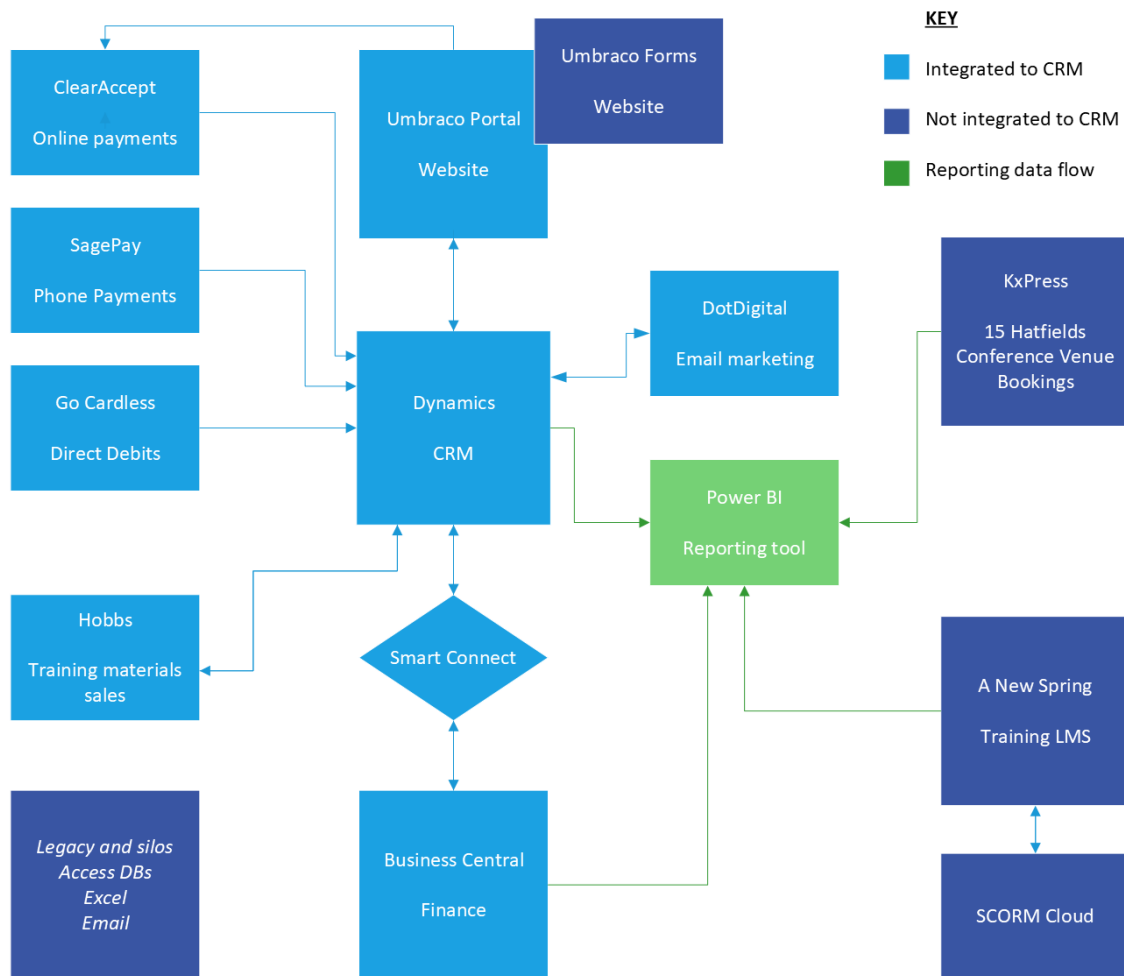
- Microsoft Business Central – our accounts system, integration is based on SmartConnect.
- Payment systems – ClearAccept for online payments, SagePay for phone payments, and GoCardless for Direct Debits.
- Dotdigital – for email marketing.
- Openbadges – for issuing professional digital credentials.
- Hobbs – our order fulfilment house for training materials. Integration is via SFTP.
- PowerBI.

We have a few other business systems which are not currently integrated with our CRM or website:

- Kxpress/KxConferencing – for managing our bookable conference centre spaces
- aNewSpring –e-learning LMS.
- ATP & Candidate Databases – SQL based databases. Currently running on azure servers being migrated to PowerPlatform this year.

CIEH Business Systems - Data flow diagram

February 2025
K Hopkins / R Allen



CRM Data Volumes (approx)

- Active Members: 7,600
- Total Individual Contacts: 42,000
- Total Organisations: 3,600
- No. of Events per annum (2024): 225
- No. of Event Delegates per annum (2024): 8,000
- No of invoices raised (2024): 13,000
- No of card payments taken (2024): 3,700
- No of DD payments taken (2024): 28,000

High level CRM / website related business processes

- Membership: join, renewal, upgrade, lapse. CPD tracking. Member communications.
- Events: online & phone bookings, event communications, event sponsorship.
- Work Based Learning: track customers running accredited training in the workplace, and track candidates taking that training.
- Marketing: email campaigns.
- Payments: card payments online & by phone, direct debits for memberships, employer invoicing.

- Online Professional Register search.
- Online Magazine and other member resources.
- Online news, blogs, press releases, etc
- eLearning

Websites

<https://www.cieh.org/> - main corporate website.

<https://www.cieh.org/portal/> - member/customer portal (feel free to create a free account).

<https://www.15hatfields.com/> - conference centre.