

SPECIFICATION: TECHNOLOGY AND DIGITAL TRANSFORMATION STRATEGY

PURPOSE

The purpose of this document is to guide those involved in procuring goods and services from the Foundation on building a procurement specification, as referenced in the Request for Quote document. The aim of a procurement specification is to provide clear information to suppliers so that they can fully comprehend our requirements and specify and price their solution accordingly.

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1. INTRODUCTION

This work will set a vision for the Foundation's use of technology to support the organisation to achieve its mission which can inspire us all, articulate the strategy and outline how we get there in a roadmap.

The Foundation does not have an existing technology strategy. Up until now the strategy for Systems and IT has been implicit and relatively short-term, typically focused on an explicit single year's roadmap and short-term needs of its business areas.

We have been working over the last 12 months to ensure we have the basics covered in all areas, and to bring more process and structure into the team moving the digital mandate to a newly formed Systems team. Now that we have a more stable and secure platform, in terms both of technology and team, we can set more long-term objectives in the form of a 2025-28 vision, strategy and roadmap, covering technology and digital transformation.

External context

While we have been focused on supporting a larger organisation and getting some of the basics right, in the wider world the pace of technology development has continued, and opportunities arise which we are not well placed to take advantage of. While we have taken advantages of the opportunities inherent in the shift to cloud computing, we have as yet made little use at our new scale of automation and none at all of generative AI.

Why do we need a technology and digital transformation strategy and why now?

Now that we have a more stable and secure platform, in terms both of technology and team, no further known significant staff expansion plans, and clarity on mandate, we can set more long-term objectives in the form of a 2025-28 technology strategy with a clear vision of what we expect to be building towards, covering internal digital transformation and Systems / IT.

What will drive change in the future?

The chief strategy drivers of technology change for us over the next three years are likely to be:

- wanting to be more efficient as an organisation, including making cost savings;
- our activities as a fundraiser and marketer, where we are seeking to rapidly scale our fundraising;
- our activities as a grant-maker and funder, where we are seeking to involve those outside the Foundation more in our strategy and decision-making; and
- an increasingly complex cybersecurity landscape.

2. SCOPE

The core scope is our organisation-wide processes, systems and technologies, along with the capabilities and digital skills that our organisation needs to be successful. While primarily internally focused, the work should also consider how we apply technology to collaboration with our partners, specifically around extranet provision. As well as covering the technology itself, this work should cover core digital skills within the organisation, liaising with the Talent function within the People & Culture team as needed. It should of course cover the areas of further work and challenge noted above.

This work is not the main place where we will consider digital transformation and/or technology innovation for external brand, marketing and fundraising, which will be for Charities in work led by the Head of Digital in the Charities team, Jeff Boachie (currently Interim Director of Marketing and Digital). However, this work will be the main place where we set out our overall approach, and we will want the two pieces of work to co-ordinate with one another and share approaches where appropriate. This will be facilitated by Jeff Boachie sitting on this project team. The exact boundaries we will agree during the initiation phase for the work.

3. OBJECTIVES

The Foundation wants to set out a vision, strategy and roadmap for how it applies technology to support the organisation and achieve its mission.

The big picture goals for this work are:

- Set a clear vision of where we are going to get to in 3 years that will inspire us all
- Know where we need to excel, and where good enough is fine; ensure a good balance between efficient delivery and innovation (enterprise)
- Apply technology, digital transformation, automation, AI and change management techniques to our processes and systems so that:
 - Staff (and potentially partners) have a great user experience (inclusion)
 - We can collaborate easily and securely (including with our partners)
 - We can deliver efficiently, i.e. we save time and money
- Ensure all staff have the technology and digital skills to deliver for our mission
- Put in place the tech team capabilities we need to support our ambitions

It will focus on technology in general but also specifically on digital transformation. The Foundation has no current definition of “digital transformation”, but as a working definition we suggest “How we enable our staff, processes and culture to deliver for our mission through the application of, and building capability in, digital technologies.”

Existing challenges the strategy should likely address

Challenges have been identified through prior work at the Foundation. At a high level, we looked at some related challenges in Setting Ourselves Up For Success (SOUFS), a 2024 structure and ways of working review supported by consultancy Q5 and Sarah Young. Earlier, the then Digital team had begun work on a Digital Maturity model, conducted by William Joseph in 2022 across the then separate Charities, Digital, MarComms and Fundraising teams spread across our organisation and our fundraising service provider. At a high level, and generalising, they include:

- Being clear on what is meant by digital and on the extent to which digital needs are decoupled from digital marketing needs in our organisation
- Pockets of digital (& technology) skills across the organisation, with an appetite for more
- A default to meeting-based or offline or document-based thinking rather than a digital approach
- Hard to make time and/or get support for digital innovation: drowned out by BAU

- No agreement between teams on the role of analytics in their work – a “shared vision of the truth”
- Use of multiple systems to do similar or adjacent jobs or processes

Anecdotally, there are other challenges that our users regularly encounter:

- Training gaps: we need to be clear on who needs training on what, and staff need access to both a programme of training and to practical, on-demand training and guidance
- Small but high-friction issues which we do not necessarily identify and resolve quickly
- Lack of accessible routes for feedback or ideas: staff don’t always know how to suggest digital/process improvements
- Change fatigue: broader than Systems alone, but the pace of initiatives can undermine digital adoption

A key challenge for an organisation that seeks to be external facing, partner-focused and collaborative, is how to enable effective digital collaboration with partners while maintaining appropriate data governance and security.

There are some specific governance challenges the Systems team have faced which would be eased through having a clear and approved strategy. These include:

- Lack of buy-in for systems priorities, and managing conflicting and changing priorities in business areas without reference to a core set of priorities
- Governance: no obvious mechanism beyond line hierarchy for approving priorities and roadmaps (except for the Executive Team)

One identified issue which will probably not be in scope for this work but this is subject to review is lack of a data strategy / co-ordination on business intelligence / data insight challenges.

4. DETAILED REQUIREMENTS

Deliverables

The deliverable is a strategy covering the period 2025-28. The strategy should:

- a)** Summarise where the Foundation’s technology and internal-facing and extranet-like digital processes are at today, including strengths and weaknesses
- b)** Review the organisational and external context shaping our technology needs over the period
- c)** Define a vision:
 - Start from a baseline end state that any information-driven organisation of our size and shape should be aiming for
 - Drawing on consideration of our longer term impact goals, corporate goals and financial objectives, define where systems and technology does or should play a critical enabling role (or possibly a leading role), over and above the baseline – where do we need to excel?
 - Define a preferred end state specific to our organisation that is achievable given our resource constraints

d) Conduct a gap analysis versus our current state:

- Review existing plans against alignment to the strategy
- List and prioritise technology and digital initiatives needed to achieve the target end state, with suggested timescales and where possible approximate resource estimates
- Review any known barriers and suggest solutions; include in this an assessment of the organisation's capabilities to partner with Systems / IT and System / IT's capabilities
- Review capabilities and resources required to achieve and then maintain the preferred end state and review this against current Systems capabilities and, at a high level, budget

e) Review desired end state based on feasibility of what is identified during the gap analysis

f) Draft a roadmap for the next three years

g) Suggest an approach to technology governance

h) Identify risks and dependencies of the strategy

Known areas for attention

Efficiencies

The strategy work should identify and, where possible, quantify opportunities for the application of technology to save time, money or both. At a cross-foundation, generic level this might include (but not be limited to):

- Consolidating/connecting systems to save money and standardise for ease of use
- Reducing meeting-driven commitments, for example by automating note-taking and action-generation, or replacing some meetings with offline tools
- Automating inbox and calendar management activities

It should also come up with a value-based approach to reviewing our main processes and prioritising them for transformation.

Critical, transformational projects

There are some potential critical transformation projects to be evaluated within the strategy.

- 1) Unified CRM / grant management / fundraising [most likely as consolidation of Raiser's Edge into existing Salesforce instance] - depending on extent of integration with marketing this could be a joint project with Charities Digital team.
- 2) Finance systems and reporting, and its integration / consolidation with related systems.
- 3) Improvement to information management and accessibility [project already underway known as "Office 365 optimisation"].

This list is not exhaustive. The strategy development should surface any other projects which are critical.

In relation to 1) and 2), the strategy will need to decide how we are consolidating across the systems that we use, and if we should be working towards an ERP or other over the strategy period, with summary evaluation of the opportunities, risks and costs of doing so. This is a fundamental decision and would affect much of the rest of the strategy.

Projects identified as critical and transformational should have an outline business case developed, either alongside or immediately following the strategy work.

Artificial Intelligence (generative)

We should take stock of the opportunities afforded by the rise of generative artificial intelligence, and where it could help us in our digital transformation, whether that be in general AI use cases (such as meeting support, inbox management, finance automation, etc), use cases specific to us as a funder (sharing evaluation results, due diligence, etc) or use cases specific to us as a fundraiser (e.g. in agentic response to marketing engagement or ad campaign management), though this last may be mostly delivered in parallel work, see dependencies below. The strategy should also consider risks, notably ethics and data protection. The strategy should help us be clear about the difference between what we expect to adopt into the mainstream, and where we may want to test some innovation.

Digital Skills

Having the right technology, even if it is easy-to-use, will deliver very little by itself. We need our team to be not only equipped to use the systems that we have or put in place, but to identify opportunities for further improvements. Working with our Head of Talent we wish to review the skills required and implement a programme to enable everyone to flourish within a fully digital landscape.

Other major technology/digital opportunities

The strategy should consider through consultation with stakeholders and other teams what other significant opportunities we should exploit. Possible candidates include:

- Systems that support alternatives to meetings, as part of our drive to reduce meetings
- Internal Knowledge Hub development: a searchable, structured resource for onboarding, guidance, templates, process explainers across teams and so much more...
- Digital tools for partner collaboration: user-friendly platforms to support secure document sharing, grant tracking, or co-delivery planning with external partners (e.g. Salesforce Experience Cloud)
- Workload transparency dashboards: tools to help teams understand plans, workloads and availability across the organisation, or at least across teams with high levels of cross-directorate collaboration
- Feedback and ideas platform: a standing mechanism for staff to propose improvements or flag issues, with transparent tracking of suggestions
- Experimentation sandbox: a structured way to pilot tools in a low-risk setting, which we already do in some areas but could formalise and expand

We will also want to opportunity scan with staff and teams during the strategy work to identify other opportunities, both large and small.

Systems team capabilities

In the context of setting out how we deliver on our vision, some review of our Systems team's capabilities will be required.

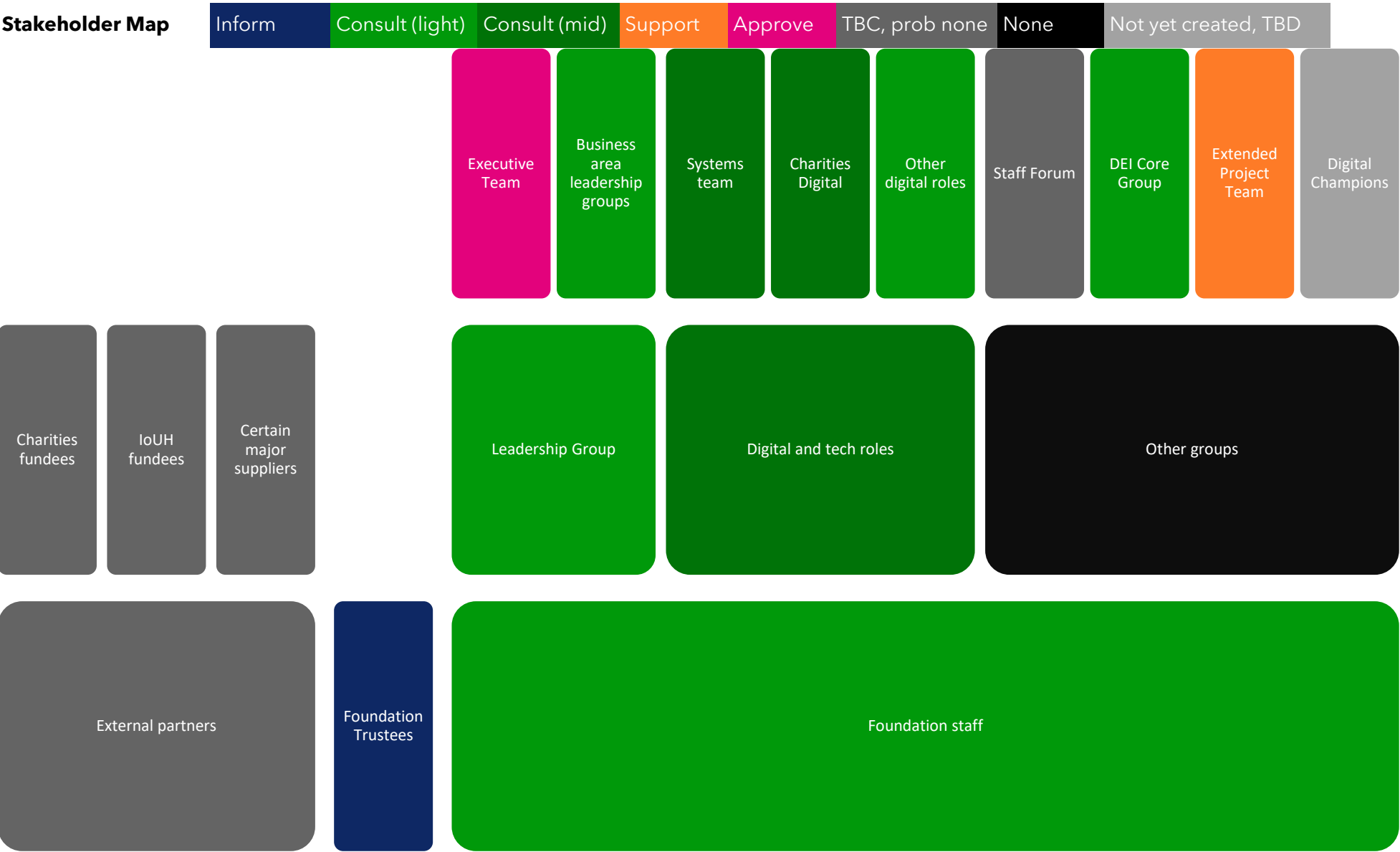
Engagement

Foundation staff will shortly be aware that we will be working in this space when we communicate the corporate plan w/c April 21. We plan to engage all staff and stakeholders (see stakeholder map on next page) and would wish the successful bidder to be a part of that engagement and on occasion to lead it. Bidders should outline their proposed approach to engagement; this will be discussed with shortlisted bidders.

However, mindful of our limited resources, we will need to manage engagement with larger groups carefully. Our current intent is to find leveraged ways of engaging all staff at front end / the opportunity scan stage, for example using a combination of surveys and optional drop-ins, and then again as the strategy completes, but to avoid engaging them in detailed work in the middle, where the extended project team will shoulder most of the work.

We will decide later whether we will need to engage with external parties, or whether our internal teams can proxy for their needs, but in any event, this would be kept small scale.

We have in mind to create a group of Digital Champions- on the model of other "Champion" roles we have in place - either during or after the strategy creation, to assist with embedding and implementation, based on the recommendation of the successful bidder.



5. KNOWN DEPENDENCIES / POTENTIAL DEPENDENCIES

There are dependencies with other work going on at the Foundation. In no particular order:

- "Office 365 optimisation project" -the non-security-related elements of that project would ultimately become part of this strategy [IT Manager]
- Existing work on stakeholder management within CRM - [IoUH Director of Change]
- People and Culture digital transformation work programme [CPO]
- Evaluation and Learning work on how to share best practice in funding [IoUH Director of Data, Evidence and Learning]
- Fundraising ambitions [Fundraising Director, Head of Charities Digital]
- Charities Digital marketing transformations (potential dependency in respect of unified CRM, perhaps areas of overlap to be resolved) [Head of Charities Digital]
- Participatory model – an intended shift to a more participatory model of funding will likely increase the need for extranet-like services and processes [TBC (IoUH) and Funding Director (Charities)]
- Work to reduce meetings and shift work from online to offline [TBC]

This work has primacy among most if not all of the work listed above.

6. TECHNOLOGY, SYSTEMS AND MANAGEMENT TECHNIQUES

Bidders must have a wide range of experience of technologies, software and systems. They must be independent and software-agnostic.

We expect the successful bidder to use standard Microsoft / Office 365 tools and technologies to deliver the engagement. Other technologies the bidder may wish to use should be identified in the proposal.

We are open minded on the bidder's approach to project management, but will expect the bidder to interface with the Foundation's use of Teams and Microsoft Planner as a project management / communication tool.

7. QUALITY REQUIREMENTS

The Foundation expects that the work will be of good quality and delivered to time and to budget. It is expected that the bidder should structure their bid to include interim deliverables.

All deliverables will be subject to acceptance by the Foundation, which will not be unreasonably withheld.

Bidders should list in their proposal any quality assurance standards they adhere to (e.g. ISO9000).

8. IMPLEMENTATION TIMETABLE

A consultant is expected to be appointed during May 2025, and the work kicked off on June 1, with final deliverables due at the end of August 2025. We expect bidders to propose interim deliverables as milestones during the project.

The roadmap produced during the work should cover period from September 2025 to March 2028, which is the implementation period of the strategy as a whole.

9. BUDGET

The Foundation expects bids for this work to fall into the range £40k-60k, inclusive of VAT.

10. GLOSSARY

Foundation	<p>Guy's & St Thomas' Foundation –inc. Impact on Urban Health, Guy's and St. Thomas' Charity, Guy's Cancer Charity and the Evelina London Charity</p> <p>The Grain House 46 Loman Street London SE1 0EH</p> <p>A registered company in England and Wales 9341980.</p>
Contract	Means any contract that results from this Request for Quotation
Contractor	Means the organisation or individual that forms a Contract with the Foundation for provision of the requirement.
Proposal	Means a written offer submitted in response to this Request for Quotation
Proposer	Means an organisation or individual that submits, or is invited to submit, a Proposal in response to this Request for Quotation
Requirement	Means the supply to be made by the Contractor to the Foundation in accordance with Part 2 of the RFQ.
Specification Guide	Document supplied under separate cover that outlines in more detail the Requirement as specified in Part 2