Request for Quote

(Confidential)

Guy's & St Thomas' Foundation

CONTENTS

PART 1 – INSTRUCTIONS TO PROPOSERS AND PROPOSAL CONDITIONS

1.1 DEFINITIONS

For the purposes of this Request for Quotation (RFQ) and any subsequent contract the following definitions, unless otherwise noted, apply.

Foundation	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** The Grain House 46 Loman Street London SE1 0EH A registered company in England and Wales 9341980.
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

1.2 SUMMARY OF THE REQUIREMENT

The Foundation invites you to submit a Proposal to meet its requirements in respect of Technology & Digital Transformation Strategy.

SUMMARY: **deliver a vision, strategy and roadmap for the Foundation's application of technology to support the organisation to achieve its mission.**

Further details are in Part 2 of this RFQ / attached Specification.

1.3 STRUCTURE OF THIS DOCUMENT

Part	Title	Description
1	Instructions to Proposers and Proposal Conditions	Sets out rules and requirements for participation in the RFQ.
2	The Requirement	Sets out overview of the requirement, contract and payment terms – see also Specification Guide supplied under separate cover.
3	Information to be provided by Proposers	Sets out the minimum response requirements to allow due consideration by the Foundation.

1.4 RFQ KEY DATES

The Foundation follows a Request-for-Quote (RFQ) process to ensure they are receiving value for money, good quality products & services and assurance of supply, along with best practice and innovation.

TIMELINE

Key Milestone	Date
RFQ issued to potential proposers	April 16, 2025
Closing date for Clarification Questions	cob. April 28, 2025
Closing date and time for submissions	9am May 1, 2025
Shortlisting process	May 1 - May 8, 2025
Communication to shortlisted proposers	May 8, 2025
Panel interviews with shortlist	w/c May 12, 2025
Preferred bidder decision	May 20, 2025
Contract review	May 20 – May 27, 2025. Foundation will circulate skeleton contract to shortlisted proposers
Estimated Contract Award Date	May 27, 2025
Proposed Contract Commencement Date	June 1, 2025
Contract Completion Date	August 31, 2025

1.5 FOUNDATION CONTACTS

The Senior Responsible Officer for the project is Moray McConnachie, Executive Director of Operations. The following individual is the nominated Organisation contact for this RFQ.

Nominated Contact:	Michelle Harries, Lead Business Analyst
Email:	michelle.harries@gsttfoundation.org.uk

1.6 QUERIES AND QUESTIONS DURING THE RFQ PERIOD

Proposers are to direct any queries and questions regarding the RFQ content or process to the Foundation contact. No other Foundation personnel are to be contacted in relation to this RFQ unless directed to do so by the Nominated Contact or by the Senior Responsible Officer. The Foundation reserves the right to disqualify and reject Proposals that do not comply with this requirement. All questions should be submitted to the Foundation contact.

The Foundation will in most circumstances choose to convey responses to submitted questions and queries to all Proposers so that each is equally informed.

1.7 AMENDMENTS TO RFQ DOCUMENTS

The Foundation may amend the RFQ documents by issuing notices to that effect to all Proposers and may extend the RFQ closing date and time if deemed appropriate.

1.8 PROPOSAL SUBMISSION METHODS AND REQUIREMENTS

Proposers must submit their Proposal to the Foundation in the following format:

    A. By email to: Andrzej Tucholski, Andrzej.Tucholski@gsttfoundation.org.uk
    B. Your response must be in English and in a PDF format

Proposals must contain the information as described in section 3 below, and additionally an Appendix 1 outlining the solution in detail, as described in section 2 of this document / the Specification Guide.

1.9 LATE PROPOSALS

Proposers are responsible for submitting their Proposals prior to the RFQ closing date and time in accordance with the acceptable submission methods described in the section RFQ Key dates. There will be no allowance made by the Foundation for any delays in transmission of the Proposal from Proposer to the Foundation. Any Proposal received by the Foundation later than the stipulated RFQ closing date and time may be removed from further consideration by the Foundation.

1.10 ACCEPTANCE OF PROPOSALS

A Proposal will not be accepted by the Foundation unless and until the Foundation has signed a Contract or sent a 'Notice of Award' in writing to the successful Proposer. Contract award is subject to the formal approval process of the Foundation and no contract will be awarded until all necessary approvals are obtained.

The Foundation is under no obligation to accept the lowest priced Proposal or any Proposal and reserves the right to reject any Proposal which is incomplete, conditional or not complying with the RFQ documents. A Proposal must fulfil all the Requirements.

1.11 VALIDITY OF PROPOSALS

Proposals submitted in response to this RFQ must be valid for a period of 90 days from the RFQ closing date.

1.12   PROPOSERS TO INFORM THEMSELVES

The Foundation has taken all reasonable care to ensure that the RFQ is accurate, however it gives no representation or warranty as to the completeness, accuracy or sufficiency of any information made available within or in relation to the RFQ or that all Proposers will receive the same information. Proposers are required to inform themselves fully of all conditions, risks and other circumstances relating to the proposed contract prior to submitting a Proposal. Proposed prices shall be deemed to cover the cost of complying with all the conditions of the RFQ and of all things necessary for the due and proper performance and completion of the Requirement.

The Foundation will not be responsible for any costs incurred by Proposers in the preparation and submission of proposals.

1.13 CONFIDENTIALITY

Except as required for the preparation of a Proposal, Proposers must not, without the Foundation's prior written consent, disclose to any third party any of the contents of the RFQ documents. Shortlisted Proposers will be asked to complete an NDA prior to interview stage.

PART 2 – THE REQUIREMENT

2.1 BACKGROUND

THE FOUNDATION'S MISSION, VISION AND VALUES

Guy's and St Thomas' Foundation is an independent foundation that invests, partners, engages and influences to come at big health challenges from all angles. Through our family of forward-looking organisations, we collaborate with our communities, partners and hospitals, and use our assets to transform lives. Across everything we do, we look to increase our impact by sharing and connecting with others working on better health – from our part of the city to cities around the world.

Here are our values as an organisation, and what we think they mean for our technology ambitions:

- Collaborative: our technology must support the effective collaboration of our staff teams and our collaborations with our partners
- Delivery-minded: our technology must promote efficiency and allow us to complete projects and accomplish tasks in as straightforward a way as possible.
- Enterprising: our technology must be adaptable to our changing needs and itself a driver and enabler of innovation and enterprise at the Foundation
- Inclusive: our technology must be accessible to a diverse range of staff and partners

Diversity, equity and inclusion are important to us not only as a good "corporate citizen", but because they are crucial to achieving our mission in Lambeth and Southwark, two of the UK's most diverse boroughs, in which health outcomes are not equitable.

ORGANISATIONAL STRUCTURE

Guy's and St Thomas' Foundation is a charitable company limited by guarantee. There are currently two trading subsidiary companies which hold financial and property investments. The Foundation operates unrestricted, restricted and both permanent and expendable endowment funds. The beneficial ownership of the expendable endowment and certain restricted funds lies with linked charities of which the Foundation is the sole corporate trustee.

The Foundation's activities are organised into three business areas:

- **Charities**, comprising fundraising via our three main charity brands (Evelina London Children's Charity, Guy's Cancer Charity and Guy's & St Thomas' Charity) and related expenditure in support of improving staff welfare and patient experience across Guy's, St Thomas', and Evelina London hospitals and community sites
- **Impact on Urban Health**, which funds a range of partners through a programmatic structure and is committed to achieving health equity by helping urban areas become healthier places for everyone to live
- **Investments**, which manages the endowments that are invested in a mix of financial and property investments, with a dual mandate of generating financial returns and health impact

These business areas are supported by the following central units: **Corporate Communications**, **People and Culture**, and **Operations**, the latter comprising Finance, Funding Operations, Systems, and Legal/Governance.

The Foundation operates from a single location: its registered office in Southwark. At the time of writing, the Foundation had approximately 220 FTE employees.

The Foundation's Trustees, who are also the directors of the company, are eleven in number and meet six times per year. The Trustees have a wealth of experience across healthcare, business, investment management and the public sector. The Board is supported by specialist committees including an Investment Committee and a Finance and Audit Committee. The Finance and Audit Committee usually meets four times a year.

Day -to-day management of the Foundation is delegated to an Executive Team comprising the Chief Executive and four Executive Directors.
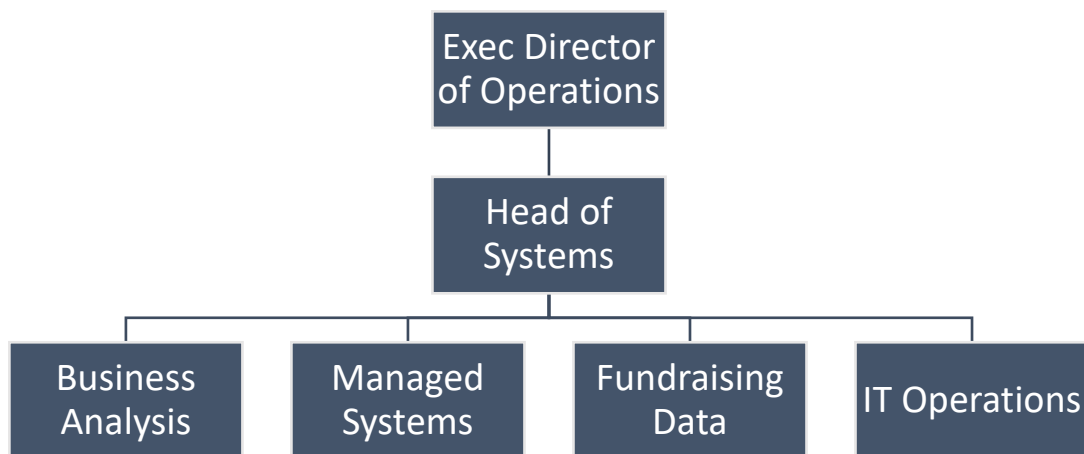
The responsibility for technology and for digital transformation sits with the Systems team within the Operations business area, and the Senior Responsible Officer for this project is the Executive Director of Operations.

EXISTING TECHNOLOGY STRATEGY, PLATFORM AND TEAMS

We do 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, although with a wishlist extending into the future. It has also been heavily driven by the short-term needs of business areas. This is not abnormal in a rapidly scaling organisation: you rightly focus on getting the systems and support in place that can cope with supporting immediate needs. The latest iteration of this scaling approach saw us in August 2024 insourcing fundraising colleagues and the systems they need to support their work. Meanwhile we have been accumulating technical debt as a result of the workarounds we have had to put in place.

Nevertheless, we have successfully completed some milestone projects over this period, including a soup-to-nuts revamping of our grant management systems, financial system upgrade, insourcing our technical support, moving all Foundation-owned computers to fully managed, ensuring basic security, working with the People and Culture team to fully update all HR Information Systems.

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 – with thanks specifically to Ram Sri-Pathmanathan (Head of Systems), Rosie Donnelly (IT Manager), and Michelle Harries (Lead Business Analyst). The Systems team comprises 15.8 FTEs at an annual cost of £0.9m. Following organisational structure changes, insourcing of IT support, and a shift of digital mandate from a previous Digital team to the Systems team, we ushered in a new team structure which went live at the end of September 2024. This structure is intentionally not the final shape of the team, which we will review following completion of, and informed by, this strategy work.

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We also have a sizeable number of externally focused digital roles within the Charities Marcomms and Digital team. This team, led by Jeff Boachie, our Head of Charities Digital and Interim Director of Marketing and Digital, mainly focuses on our Charities digital properties as a support to our fundraising efforts. There are additionally a couple of digital roles within Corporate Comms and Impact on Urban Health, mainly focused on marketing and comms through our website and social media.

EXISTING TECHNOLOGY

The Foundation uses Office 365 and related Microsoft 365 software, in a "cloud only" configuration. Microsoft Surface Pro Laptops are provided to staff, running Windows 11, with a limited number of corporate mobile devices. Bring Your Own Device is also on offer for both mobile and other computing needs.

Salesforce, which has been configured to the Foundation's requirements, is used to support the development of grants and charitable contracts up to approval and for post approval management.

The Foundation has used Access Financials as its finance system since April 2012. The configuration allows for complete segregation of funds; and individual grants, contract and special purpose funds are tracked using a project ledger.

The fundraising platform is Raiser's Edge in the NXT version, upgraded from the legacy version we inherited in August 2024 when we insourced our fundraisers, which we connect using import/export tools to Fundraising donation platforms (e.g. JustGiving & goDonate) as well as Event platforms (e.g. EventBrite & Enthuse).

Mass mailing email platforms include: MailChimp/Intuit and Emma. Other digital tools relating to social media, website design and image creation are also in use.

Management information is delivered through a combination of Excel, Salesforce and PowerBI. The Digital team also use analytics tools like Google Analytics and Supermetrics.

The Foundation makes some limited use of automation, especially in the form of Salesforce workflows, and no formal use of generative AI (though we are sure this falls into the category of shadow IT).

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 arisen 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.

2.2 OVERVIEW OF THIS PROJECT

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 a longer-term vision, strategy and roadmap for technology and digital transformation. The big picture goal for the 3-year strategy is:

To 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

To deliver these goals the strategy will also need to:

- Set a clear vision of where we are going to get to in 3 years that will inspire us all
- Cover where we need to excel, and where good enough is fine; ensure a good balance between efficient delivery and innovation (enterprise)
- Ensure all staff will have the technology and digital skills to deliver for our mission
- Consider the tech team capabilities we need to support our ambitions

The Foundation requires a consulting partner with the knowledge and experience to lead the strategy development process and deliver vision, strategy and roadmap, in partnership with the Executive Director of Operations and other Foundation staff.

The project structure will involve a small core project team, reporting to the Executive Director of Operations, chaired and project managed by the Head of Systems, and including the Head of Charities Digital, our Lead Business Analyst, and the Operations Business Manager for administrative support. An extended project team will provide support for the project, covering innovation, people systems, data protection, L&D/skills, IT, and connections to other digital activity.

2.3 DETAILED SPECIFICATION

In this RFQ process the Foundation is looking for the proposer to provide a solution that meets the performance, requirements and project scope. These are defined in the Specification Guide provided under separate cover. Pricing should be included in the format provided in 3.4 Pricing Schedule.

2.4 CONTRACT TERMS

The proposed Contract start date is June 1, 2025. The duration of the agreement with the successful Proposer will be 3 months, with all deliverables having been completed by the end of the contract. Contracts will be a contract for service, and no relationship of employer to employee is contemplated.

Shortlisted Proposers will be provided with a copy of the Foundation's contract, including terms and conditions, against which the best and final offer will be made.

Shortlisted suppliers will also be provided with a copy of the Foundation's minimum supplier requirements which they will need to confirm they can meet.

2.5 PAYMENTS

Payment terms will be agreed during award of contract, but up to 70% of the project value is available during the engagement, based on time contributed and where appropriate acceptance of interim deliverables. 30% of the project value must be invoiced after the Foundation confirms acceptance of the final deliverables, which will not be unreasonably withheld. Invoices which are duly and correctly submitted will be paid within 30 days of receipt.

2.6 PROPOSER ELIGIBILITY

Proposers must be able to demonstrate that their principal(s) for this project have three or more years of experience in delivering similar work, including for charities and/or other mission-driven organisations.

Proposers must be willing and able to attend on site at our Southwark offices by arrangement during the project lifetime.

Proposers must be able to meet the timelines in the documentation, including being able to deliver the project between June 1 and September 5.

2.7 RFQ EVALUATION

Proposals will be evaluated initially using the following criteria, and a shortlist of Proposers identified. Following further evaluation comprising a panel interview with shortlisted Proposers, a preferred bidder will be identified, and contract negotiations proceed with them until contract award.

Category	Description
Understanding and engagement	- Experience working in the charitable sector, preferably with fundraising charities and/or Foundations - Understands and effectively plays back what is learnt during engagement. - Able to engage multiple teams with different focus areas and priorities, including tech, marketing, operations, fundraising, comms, legal, and impact teams - Able to engage stakeholders at all levels of seniority

Experience – Technology Strategy	• Experience developing and implementing technology strategies in similar-scale charities or mission-led organisations • Change management expertise relevant to technology strategies • Familiar with Microsoft 365, SharePoint, Salesforce and related systems • Experience of recommending effective technology governance models • Experience in seeding innovation but in balance with core BAU and infrastructure needs • Experience with creating roadmaps of work that are ambitious but also realistic according to constraints e.g. balancing investing in efficiencies vs. Being cost-conscientious • Familiar with recommending data strategy/governance models
Experience – Digital Transformation	• Experience developing and implementing digital strategies in similar-scale charities or mission-led organisations • Experience in seeding innovation but in balance with core BAU needs • Change management expertise relevant to digital transformation • Familiar with major marketing platforms
Experience – Skills assessment	• Experience with assessing organisations' maturity level with technology and digital • Experience with methodologies for assessing the skills needed in organisations, in technology teams and in turn people to ensure Technology teams can deliver against their roadmaps
Delivery and approach	• Independent and product-agnostic • Can evidence to-time to-budget delivery • Able to work within a defined scope • Has a pragmatic understanding of organisational constraints (financial, capacity etc.) and can tune delivery accordingly • Competitive on value

PART 3 – INFORMATION TO BE PROVIDED BY PROPOSERS

Information to be provided by Proposers is outlined below and should be presented using the format below. For sections 3.2.2, 3.2.3 and 3.2.4, at this stage of the RFQ, compliance statements only are required. The Foundation may later ask for further evidence or clarification.

3.1 EXECUTIVE SUMMARY

In no more than 300 words provide your approach to proving a suitable end to end solution that meets the Requirements.

3.2 GENERAL COMPANY INFORMATION

3.2.1   Proposer Information

Name of Proposer (organisation if applicable)	
Proposer address	
Proposer key contacts	
Proposer registration (e.g. company number and jurisdiction)	

3.2.2   Compliance

Any applicable service standards such as ISO20700	
Any relevant professional standards or memberships	
Date of last statutory audit	
Compliance with GDPR	

3.2.3   Risk management

Insurance policies held for activity as consultant	
Key risks and approach to risk management	
Escalation processes	

3.2.4   References

Contact details must be provided for up to three previous or existing contracts of a similar nature to allow us to issue reference requests. These will be sought for shortlisted suppliers only.

Client/Organisation Name	Organisation Contact Name and Email address	Approximate annual contract value	Brief Description of the Project	Any other detail which may demonstrate sector synergy and relevant experience

3.3 PROPOSER'S SOLUTION

Proposers are required to submit a proposal which addresses all elements of the detailed Specification to clearly demonstrate to the Foundation the ability to deliver the required Services. The Proposer must also be able to show experience of the charity sector, and of fundraising charities in particular.

Please provide details of your proposed solution in no more than 3,000 words. The word limit does not apply to the following:

- Optional: any tables and diagrams you use to clarify your response, where appropriate
- Mandatory: annex detailing your previous experience on similar projects
- Mandatory: a resourcing plan and timeline which must agree with our start date and complete within three months
- Mandatory: pricing schedule per 3.4 below

3.4 PRICING SCHEDULE

Complete the pricing table below with the pricing you propose to charge and ensure any commentary is included in the relevant section of Appendix 1. The Foundation expects bids to be within the range of £40k-60k inclusive of VAT.

Please note:

- Submitted rates and prices must include all costs, insurances, taxes, fees, expenses, liabilities, obligations risk and other things necessary for the performance of the requirement. Any charge not stated in the Proposal as being additional, will not be allowed as a charge against any transaction under any resultant contract.
- Proposal rates and prices shall be provided both inclusive and exclusive of VAT (Value Added Tax).
- For the avoidance of doubt, all rates and prices submitted by Proposers shall be in £ GBP.
- Rates may be supplied as daily or hourly rates – please delete as appropriate. If daily rates, please clearly indicate how many hours make a day to ensure a fair comparison.

Deliverable/Phase	Hourly/Daily Rate (£)	Hours/Days #	Total Cost (£) ex VAT
Phase X – e.g *Familiarisation* Person/Role A Person/Role B Phase X resource subtotal			£
Phase X non-resourcing cost Item 1 Item 2 Phase X non-resource subtotal			
Phase X subtotal			
Phase Y – e.g *Internal Engagement* Person/Role A Person/Role B Person/Role C Phase Y resource subtotal			£
Phase Y non-resourcing cost Item 1 Item 2 Phase Y non-resource subtotal			
Phase Y subtotal			£
Phase Z etc			£
Total resource cost **Total non-resource cost**			
Total Project Cost (£ GBP ex VAT)			£
VAT rate (if applicable)			20%
VAT (£ GBP)			£
Total project cost (£ GBP inc VAT)			£