

Procuring Web Design & Development Services

Introduction

This resource sheet offers guidance on procuring website design & development. Aimed at voluntary and community organisations it is also relevant to any organisation looking to outsource website work.



Is a Procurement Process Important?

Formality in procuring any service is important to ensure both client and contractor:

- understand what is to be provided,
- are clear on budget and timescales
- have a framework for resolving any issues before they become disputes.

As the internet is a fast moving and technical environment being clear on expectations is doubly important. Whilst a well thought through project can be extended over time there is plenty of potential to make a false start. Not planning properly may mean having to start again, from scratch.

As with any project your procurement process should be commensurate with the scope of the work. Obtaining quotes by phone may be appropriate for a small scale project. However, if you are investing substantial funds you should be considering detailed specifications, interviews and references.

Stages of Procurement

Needs and Expectations

Time spent in planning out what your organisation needs from the project is time well spent. Separating essential outcomes from desirable ones can help focus limited resources. Planning will help produce a clear brief, significantly improving the prospects of delivering a successful project.

Funds & Budgets

Getting outline quotes can help determine the scope of your project. Web design is highly competitive with providers ranging from large design agencies to freelancers. DIY software options range from free downloads to expensive professional packages.

It is easy to be seduced by a low cost option that promises everything. Being clear about what your organisation needs and how much it has to spend can help decide whether to:

- invest in software or buy in support
- press ahead with the full wish list
- trim the project scope to make it more achievable
- place some aspects of the project on hold - possibly making a funding bid

Brief

No matter how detailed your project a brief is essential. A brief should be a clear statement of your needs and expectations. It does not need to be overly lengthy or technical. Up to two sides of A4 is often sufficient, provided it includes:

- a statement of what you want to achieve
- a timescale
- any particular standards or requirements that apply

Getting Quotes

Larger organisations may set out rules for tendering. Often they will allow services to be procured on the basis of quotes where the expenditure will be relatively low - say £5000. They may also require a minimum number of quotes - often three.

These principles are useful for any organisation. A full blown tender exercise may be inappropriate for a small project. However, a fixed financial threshold may not always be appropriate, other factors to consider include:

- the importance (financial or otherwise) of the project
- timescale
- expertise
- clarity of your brief

If asking for quotes providing your written brief will help limit potential for misunderstanding. Whilst your brief should be an accurate reflection of your expectations - you are procuring expertise. A more detailed tendering process can help to obtain useful advice and ideas as well as enable comparison of providers on factors other than price alone.

Tender Process

A tender exercise should follow a clear procedure and timescale.

Inviting Tenders

Invitations to Tender may be circulated to several providers and/or advertised. Voluntary organisations may be able to get details of reliable providers from their local Council for Voluntary Service.

Expressions of Interest - Larger projects, or those advertised openly may include a preliminary expressions of interest stage. With the aim of providing a shortlist of suitable providers, this asks for initial responses from organisations asking if:

- they are interested in the project
- they meet specific criteria

Criteria may include, depth of experience and /or number of years trading. For web projects a number of completed projects may be required.

An invitation to tender should include:

- project brief
- design brief
- specification
- form of tender

Project Brief

The purpose of the project brief is to set out aims and objectives - a clear statement of what you want to achieve, it can be non-technical.

Design Brief

If you have requirements or preferences for design set them out. This could include fonts, font size and colour scheme and detail graphics to be used or provided.

Specification

A statement of any technical standards that should be applied and any specific requirements (for example: accessibility).

Form of Tender

Details of the tender process, timetable and any information that you may require - for example references or policies. This should also include the return address and method (e.g. postal, e-mail etc.).

These may be individual documents but may be sections of one tender document. Documentation should aim to:

clarify methods - ask for details of how your desired outcomes will be achieved (formally a method statement)

invite advice & proposals - use the tender as an opportunity to test your ideas and get some advice.

identify a budget - an overall project cost is essential whilst a detailed costing can help prioritise work and manage the final contract.

set timescales and milestones - be clear about when you expect the project to be completed.

find out about each applicant - if necessary ask for any additional information about the provider, for example experience, accounts and/or relevant policies and procedures. If you are inviting unknown organisations to tender asking for references is important. For web work details of example websites are also useful.

enable an objective assessment - a clear process will enable submissions to be judged on a like for like basis. This should include details of the submission deadline and return address as well as your decision making timetable.

Tender Interviews

Tender interviews may not be essential if you feel you have enough information to make a decision from written submissions. If they are held their purpose should be clear and potential providers treated on a like for like basis.

The Contract

If an agreement is entered into with the chosen provider it is good practice to have a written contract which sets out key terms. This can apply to all your organisations' contracts. Specific contract requirements being provided by your brief, the tender submission and any other documents created as part of the tender process.

In the absence of a written contract any available documentation provides the only evidence of the agreement - another good reason for having a clear brief and obtaining clear tender submissions.

More Resources

For useful documents on preparing an invitation to tender:

www.scottish-enterprise.com
Writing an Invitation to Tender

For details of your local CVS & voluntary sector support:

www.navca.org.uk
www.ncvo-vol.org.uk
Model Contracts - LVSC