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## **NCC Group Report**

To



**Design Options to  
Upgrade from  
Windows NT4 to  
Windows 2003,  
Exchange 2003  
and Active  
Directory**

**Tender  
Procurement  
Report**

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## Report Control Information

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## Section 1 Management Summary

### 1.1 Introduction

The NCC Group was asked by Three Rivers District Council (the Council) to assist with the procurement of an appropriate supplier and their design to upgrade the Council's network environment from Windows NT4 to Windows 2003, Exchange 2003 and Active Directory.

### 1.2 Selection

The Council had already undertaken a PQQ assessment stage and had identified 18 potential suppliers via this process. Following this, a Statement of Requirements (SOR) was developed and agreed (see Appendix C). The 18 suppliers were invited to respond to the SOR by the 31<sup>st</sup> March 2005.

A total of seven suppliers responded to the SOR and these responses were assessed and evaluated by the evaluation team utilising a pre-defined and agreed evaluation matrix (see Appendix A). The summary scores for this initial evaluation were as follows:

Supplier	Total
Fordway	80.3
Meritec	74.8
Steria	67.5
Insite	65.1
Evesham	64.4
Plan-Net	51.0
Systems Group	42.6

Due to the quality of the responses and the evaluation scoring, it was agreed that Evesham, Systems Group and Plan-Net would not be shortlisted to the presentation stage. Insite, Steria, Meritec and Fordway were invited to present their solutions to the evaluation team on 23<sup>rd</sup> and 25<sup>th</sup> May 2005.

Following this presentation and clarification stage, further assessment and evaluation was undertaken and it was agreed that Fordway and Insite would be shortlisted to the final stage. Meritec were omitted from this stage primarily due to their professional services costs being almost twice as much as virtually all other solutions. Steria were omitted due to the considerable amount of input that would be required from the onsite support staff and the number of days to implement the design seemed excessive compared with other solutions.

Customer reference site evaluations were undertaken for both Insite and Fordway and although all responses were favourable, as expected, it was agreed that Fordway had a greater level of experience within this technical area and were more actively involved in implementing, and completing, migrations of a similar nature currently. This further strengthened the initial tender response evaluations and scores identified earlier.

### 1.3 Recommendation

On this basis it is recommended that the Fordway solution is taken forward as the most appropriate solution for the Council's Microsoft Design Options solution.

In addition to the above, we fully concur with the evaluation team's opinion that they are comfortable that Fordway will be able to satisfactorily implement the solution, alongside the onsite support team, and are confident that the chosen approach represents the best value solution to meet the Council's long-term requirements.

## Section 2 Approach

### 2.1 Objectives

The Council sought tenders to enter into a partnership with an experienced supplier with Microsoft design and integration skills to provide an appropriate design to upgrade the Council's network environment from Windows NT4 to Windows 2003, Exchange 2003 and Active Directory.

The design proposed must be able to provide the Council with a secure, resilient, scalable networked IT environment that is capable of addressing both emerging and future requirements cost effectively and which minimises the overall implementation impact on the Council.

This procurement process followed was in accordance with the Council's procurement framework process.

### 2.2 Approach

The procurement was based on the following methodology.

- Define the requirements and develop a clear SOR;
- Issue the SOR to all identified suppliers;
- Define and agree evaluation and scoring matrix for selection criteria;
- Evaluate the tender responses to the SOR against the selection criteria;
- Select the solution which provides best value based on the selection criteria;

### 2.3 Advertisement

The Statement of Requirements was distributed on 3<sup>rd</sup> March 2005, requesting responses by 31<sup>st</sup> March 2005.

### 2.4 Evaluation Panel

The review panel for the evaluation process consisted of:

Denis Adams	ICT Manager
George O'Sullivan	Procurement Officer
David Isherwood	Senior Consultant, NCC Group

Due to illness, Denis Adams was unable to undertake all of the evaluation and was replaced by Tim Cowland, ICT Officer.

## Section 3 Presentation and Evaluation

### 3.1 Introduction

The initial evaluation of the seven tender responses was undertaken using the evaluation model within Appendix A. This model is comprehensively aligned to the response sections within the SOR and covered the following sections:

- Technical Solution & Quality;
- Service Requirements;
- Cost of Solution;
- Experience & Expertise;
- Timescale & Implementation Process;

Each member of the evaluation team individually scored the supplier responses against each requirement within the SOR based on the criteria identified within the Proposal Evaluation Paper (see Appendix C).

### 3.2 Initial Evaluation

The summary scores for the initial tender evaluation were as follows:

Supplier	Total
Fordway	80.3
Meritec	74.8
Steria	67.5
Insite	65.1
Evesham	64.4
Plan-Net	51.0
Systems Group	42.6

The Evesham, Plan-Net and Systems Group responses were incomplete in many areas and lacking in appropriate detail and due to this it was not possible to comprehensively assess the technical solutions without extensive additional information being provided.

Therefore due to the quality of these responses and the evaluation scoring, it was agreed that Evesham, Systems Group and Plan-Net would not be shortlisted to the presentation stage. Insite, Steria, Meritec and Fordway were invited to present their solutions to the evaluation team on 23<sup>rd</sup> and 25<sup>th</sup> May 2005.

### 3.3 Presentation Evaluation

The following suppliers were asked to formally explain and present their solutions to the evaluation panel:

- Fordway
- Meritec
- Steria
- Insite

The Meritec solution appeared technically feasible, however the professional services costs were excessively high and they were not able to provide a detailed breakdown of the associated activities along with their relevant costs. A partnership with a third-party was described during the presentation as this third-party would be undertaking the migration on behalf of Meritec. Whilst this was not a cause for undue concern, this could have been a reason why the costs were much higher than the majority of other responses.

The Steria response was comprehensive but appeared too excessive in the amount of input that would not only be required by Steria, but also by the onsite support team during the implementation. Most of the other suppliers were discussing a figure of around 40-50 days to undertake the implementation, whilst Steria presented a figure of over 80 days effort, with an additional requirement for over 40 days effort for the onsite team. Similar to the Meritec offering, Steria were partnering with a third-party who would be undertaking the migration on their behalf.

Following this presentation and clarification stage, it was agreed that Fordway and Steria would be shortlisted to the final stage.

### 3.4 Reference Evaluation

This stage encompassed client reference site evaluations for both suppliers. The client reference site evaluations did not highlight any major concerns for either supplier and demonstrated a solid working relationship that appeared to work well.

Although all responses were favourable, as expected, it was agreed that Fordway had a greater level of experience within this technical area and were more actively involved in implementing, and completing, migrations of a similar nature currently. This further strengthened the initial tender response evaluations and scores identified earlier.



### 3.5 Recommendations

On this basis it is recommended that the Fordway solution is taken forward as the most appropriate solution for the Council's Microsoft Design Options solution.

The process used to select the suppliers for the Microsoft Design Options procurement has been carried out in a fair and open manner, and is fully compliant with our view of best practice for the selection of suppliers within the public sector.

In addition to the above, we fully concur with the evaluation team's opinion that they are comfortable that Fordway will be able to satisfactorily implement the solution, alongside the onsite support team, and are confident that the chosen approach represents the best value solution to meet the Council's long-term requirements.

**Appendix A Evaluation Spreadsheet**

See Three Rivers DC Tender Evaluation Matrix v1.0 (Issued)

**Appendix B Supplier Scoresheets**

Proposal Evaluation Categories	Weight	Evesham		Fordway		Insite		Meritec		Plan-Net		Steria		Systems Group	
		Mark	Total	Mark	Total	Mark	Total	Mark	Total	Mark	Total	Mark	Total	Mark	Total
Solution Requirements Total	40.0%	268.0	24.1	358.0	32.2	266.0	23.9	329.0	29.6	193.0	17.3	274.0	24.6	173.0	15.6
Service Requirements Total	20.0%	208.0	15.4	222.0	16.4	215.0	15.9	229.0	17.0	166.0	12.3	178.0	13.2	94.0	7.0
Costs Schedule Total	15.0%	69.0	9.9	99.0	14.1	75.0	10.7	78.0	11.1	60.0	8.6	99.0	14.1	57.0	8.1
General Company Information Total	10.0%	160.0	6.7	160.0	6.7	110.0	4.6	154.0	6.4	130.0	5.4	136.0	5.7	130.0	5.4
Implementation Process Total	15.0%	379.0	8.4	491.0	10.8	454.0	10.0	486.0	10.7	333.0	7.3	448.0	9.9	294.0	6.5
<b>Total</b>	<b>100.0%</b>	<b>1084.0</b>	<b>64.4</b>	<b>1330.0</b>	<b>80.3</b>	<b>1120.0</b>	<b>65.1</b>	<b>1276.0</b>	<b>74.8</b>	<b>882.0</b>	<b>51.0</b>	<b>1135.0</b>	<b>67.5</b>	<b>748.0</b>	<b>42.6</b>

**Appendix C Proposal Evaluation Paper**

See Three Rivers DC Proposal Evaluation Paper v1.0 (Issued)

**Appendix D Statement of Requirements**

See Specification v1.0 - Microsoft Upgrade