

# SPECIFICATION FOR

# ELECTORAL MANAGEMENT SOFTWARE SYSTEM

Name of Contract Manager: Gareth Harrington

Service Area: Electoral Services, Strategic Business

Proposed Start Date of Contract: 16/10/2017

Proposed End Date of Contract: 15/10/2020

Proposed Extension Period: one + one year

1. Introduction

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| Xpress is the current Election Management System (EMS) software used by the electoral services team of the Royal Borough of Kingston up on Thames. Xpress was installed in December 2006 and has been renewed on a rolling contract ever since. The current arrangements provide for an end-to-end system for the management of elections and electoral registration.**About the Royal Borough of Kingston upon Thames**The Royal Borough of Kingston upon Thames (RBK) is situated in South West London and borders (in clockwise order) the London Boroughs of Wandsworth, Merton and Sutton, the Surrey boroughs of Epsom & Ewell, Mole Valley and Elmbridge and the London Borough of Richmond. RBK consists of one full parliamentary constituency (Kingston & Surbiton) and part of a second constituency (Richmond Park) that is shared with the London Borough of Richmond. The London Borough of Richmond administer the Richmond Park parliamentary election. The London Borough of Richmond upon Thames currently used Xpress Software Solutions as their Electoral Managements system. RBK currently contains roughly 69,000 residential properties. Upon publication of the last monthly update to the electoral register on 3rd July 2017 the borough had just over 120,000 registered local government electors and of these roughly 23,500 were registered to receive a postal vote.Kingston Council (the Council) elects the whole council (48 councillors in 16 three-member Wards) every four years with the next scheduled election to take place for the Council on Thursday 3 May 2018.Kingston forms part of the South West constituency at the Greater London Assembly elections which take place every four years alongside the Mayor of London elections. The London Borough of Hounslow is the lead authority for the constituency. The next scheduled elections to the GLA is in May 2020.As with many local authority areas, it is likely there will be a Neighbourhood Planning Referendum in the near future. This may not be coterminous with existing boundaries.This commissioning exercise provides an opportunity to evaluate the market, ensuring Kingston has an Election Management System that is fit for purpose, provides good value for money and is in line with the Council’s ‘digital by default’ policy. |

2. Scope of Requirements

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| The Council is procuring an Election Management System to ensure the Electoral Registration Officer (ERO) and Returning Officer (RO) are able to continue to undertake their statutory duties by publishing and maintaining an accurate register of electors and managing elections respectively.The chosen EMS will need to comply with legislation and the Council’s ICT and data and information management procedures.It is imperative the system is compliant with all requirements and current electoral legislation, has the ability to maintain and produce an accurate and complete electoral register in a timely manner, whilst maintaining efficient and modern methods to facilitate and manage elections, registration and property database.With the introduction of Individual Electoral Registration (IER) it is essential that the election management software system has the ability to maintain the electoral database; from an individual elector, household and property perspective throughout the varying stages of registration. Specifically, with regards IER which has been in place for three years, the system shall not have 'workarounds' to complete tasks and objectives enabling Council team members to work as quickly and efficiently as possible.Best in class’ levels of ongoing support and system training shall be available throughout the contract duration to ensure all legal obligations of the Electoral Services Team, the Electoral Registration Officer and the Returning Officer can be met if/when legislation changes are made. Support and maintenance as follows shall be provided as a minimum throughout the contract duration:* Telephone support Monday - Friday 09.00 - 17:00
* Engineering support Monday - Friday 09:00 - 17:00
* Website support - 24 hour support

 System functionality and usability shall include all of the following areas: boundarylevels, franchise, electorate, properties, registration, elections, payments and management information.The EMS should* allow the ERO to publish, maintain and distribute an accurate register of electors, updates and the absent voter record
* allow the RO to administer all statutory elections in line with legislation
* allow the RO to undertake 100% postal vote statement checking
* hold the polling scheme as designated by the Council and allow the electoral services team to update this as and when required
* facilitate a move towards ‘digital by default’, in line with the local authority’s policy whilst ensuring legislative requirements are met

The EMS should have the capability to store within the system data for the current year and read-only data from from 2002 onwards.This procurement is solely for software and, if appropriate, tablet devices to allow for canvassing.Hardware, such as PCs, laptops, scanners, barcode readers etc is not included in this procurement.

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| **General System Requirements / Overall System Functionality** |
|  | ESSENTIAL CRITERIA (MINIMUM REQUIREMENTS) |
| G1 | System to have integrated solutions rather than ad ons with additional costs. The system should have a working management operating system with regards to the functions and services that elections and registration requires; digital service, scanning, PI capture/signature recognition etc., data mining/matching compatibility as required by legislation |
| G2 | The software follows the guidelines for best practice within BS7799 - Information Security Code of Practice 1995; this section details some of the key requirements but is not intended to be a complete list |
| G3 | The Software conforms with the principles of the Data Protection Act 1998, the Human Rights Act and other associated legislation |
| G4 | The software allows for compliance with the requirements of the Data Protection Act 1998 and the Freedom of Information Act 2000 |
| G5 | The software allows for compliance with the requirements of the General Data Regulation Protection (GDRP) when it becomes enforceable from 25 May 2018 |
| G6 | Support the use of an administrator user type that has the ability to configure (at least) the following items:- create, amend, and delete group/user accounts- set-up, amend and revoke access levels on group/user accounts- change user account passwords- set-up and amend password expiry intervals |
| G7 | Conform to the Electoral Registration Data Standards as required by the Secretary of State’s Direction as well as BS 7666 |
| G8 | Have the ability to sort, filter, transfer and /export large volumes of data using a specific set of parameters for selected areas (in a variety of standard file formats) for use by external organisations (e.g. for printing registration forms, poll cards, postal vote packs etc.) |
| G9 | Make data accessible for interrogation, sortation and filtration based on selected parameters and down to the lowest common denominator in order to produce statistics and correspondence (e.g. filtering to find electors who have a postal vote and have changed their name within the last year or polling places for a specific constituency etc.) |
| G10 | Include a variety of templates to mail merge specific data to automatically generate statutory letters to individual electors or applicants when triggered. This should include for example, templates for:- acknowledgement letters- review letters- name change forms- poll cards etc |
| G11 | Have the ability to produce personalised correspondence and applications forms for electors and other stakeholders based on their preferred method, either by email or by post via localised printing or uploading to an external print supplier. A copy of the sent correspondence must be stored on the EMS allowing users to see immediately the document and exact wording sent |
| G12 | Have the ability to easily create bespoke letters and mail merges for both high volume and single letter runs using industry standard approaches |
| G13 | Have the ability to produce formal notices and other materials in formats that are conducive to publishing such material on the internet (including PDF format) |
| G14 | Be able to produce statistics for a specified area (e.g. Polling District, ward, street, postcode etc.) - to be used (for example) in a Polling District and Polling Places Review |
| G15 | Produce draft versions of all forms, letters and documents (e.g. ITRs, ballot papers and poll cards) on demand using ‘live’ data to allow for proofing and other quality assurance checks |
| G16 | Produce comprehensive electorate reports, output statistics, election results and other information as requested by the ERO, RO and/or Electoral Commission in formats that can be printed, emailed and are fully web-ready |
| G17 | Other council staff must be able to easily access the Register for read only enquiry handling and application requests, such as:- confirm if on register – currently and historically- confirm ward and councillor details- poll card history- If registered for postal voting- polling station allocated to the address- request a postal vote application form- request a proxy vote application form |
| G18 | Manage all electoral boundaries and any subsequent changes in a simple and logical manner and allow data transfer with RBK’s GIS and LLPG systems |
| G19 | Be capable of interfacing with the Council’s LLPG system |
| G20 | Have the ability to receive address data from the Council’s property gazetteer in BS7666 (or current) format. In order to exchange property information with other organisations and/or their computer applications |
| G21 | The ability to record both the UPRN and co-ordinates (easting and northing) for a property |
| G22 | Provide the capability to manually create a property, range of properties or street without requiring a UPRN/USN and place it/them in a specific order within a street/district |
| G23 | Provide an easy to use reporting tool and shall have the ability to generate and save reports. There shall be a facility to produce the output either to screen, or in a printed or electronic format |
| G24 | Produce accurate reports providing all information required in statutory return RPF 29, Form K and other returns sent to Central Government, Electoral Commission, Department of Communities and Local Government and update as and when legislative change is introduced |
| G25 | Allow reports to be run at any time and not affect other users in the system or the use of any other system in use on the server or in the organisation |
| G26 | Operator specific identification system that provides a complete audit trail for all input and output transactions and limits user access to specific designated tasks as configured and set by the management of RBK’s Electoral Services |
| G27 | Have a comprehensive audit trail which tracks changes to information and creates a document history for electors and properties and records the user, date and time of each transaction |
| G28 | Allow specified user groups to access the document and change history for individual electors and properties |
| G29 | Allow specified user groups to produce management reports or interrogate data by user/document type to produce statistical information including, but not limited to:-number of transactions by user and/or date range-number of forms scanned by user and/or date range-document types produced by user and/or date range |
| **Electoral Registration Requirements** |
| ER1 | Include all fields required for data input of registration applications (inc. ITRs), annual canvass forms (inc. HEFs), postal vote applications, proxy vote applications, postal proxy vote applications, overseas declarations (and renewals), crown servant declarations (and renewals), service voters and spouses declarations (and renewals), local connection applications, anonymous applications (and all others) in accordance with UK electoral legislation and Electoral Commission guidance |
| ER2 | Meet all current statutory electoral registration requirements and provide an automated functionality for statutory processes (such as reviewing electors, adding verified electors, deleting reviewed electors, producing renewal forms for special category electors and reminders for unverified electors etc.) |
| ER3 | Produce statutory forms (such as HEFs and ITRs) allowing for the exclusion of individuals/properties based on specific parameters such as property type in line with user defined timescales for the production of reminders |
| ER4 | Be able to pre-populate forms (e.g. ITRs) and provide a bar code and electoral number on these forms as well as applicants’ provided details |
| ER5 | Produce upon demand an Electoral Register as per regulations suitable for use as intended in the relevant legislation |
| ER6 | Store distribution data for all register recipients (such as councillors, credit reference agencies, candidates etc.) including their contact details, the format they want the data in, the register areas they are entitled to receive and the password for any data files |
| ER7 | Be capable of producing an encrypted data file for the full register of electors and monthly updates (including notices of alteration pending an election) for all document recipients within the system in their chosen format allowing the ERO to produce data that is compliant with legislation, but add additional fields where necessary |
| ER8 | Include all relevant changes to an electors entry on the register in monthly updates, including changes to their opt-out status |
| ER9 | Be compatible with third-party telephone and internet systems that support automated re-registration during annual canvassing (e.g. ERS, Opt2vote etc.) |
| ER10 | Record additions, deletions and amendments from internet responses to HEFs and the reasons provided for no registered electors (such as empty properties or those with only foreign nationals present) |
| ER11 | Provide for the use of a tablet solution by canvassers throughout the year by means of commercially available Android or Apple devices |
| ER12 | Be able to scan and store an image of all property and elector based forms and correspondence against address and/or electors as relevant using a barcode or assigned using a search facility if no barcode is present |
| ER13 | Have the facility to import electronically supplied or collected data via standard file formats (e.g. csv, xls, rtf etc.) – including from for example; other council sources (e.g. council tax) and external organisations (e.g. university registration data) |
| ER14 | Allow for cutting and pasting of pending/draft entries for all elector types (including Special Category electors) between different addresses/polling districts |
| ER15 | Have the ability to identify possible duplicate electors (including pending/potential electors) and provide a facility to merge potential new electors with existing/pending/draft entries manually as well as in bulk via an automated process |
| ER16 | Identify special category electors to show that they are ‘other electors’ |
| ER17 | Hold the information for electors who are still under the age of attainment, but are old enough to pass through verification, until they are old enough to be included on the register as attainers (i.e. 16 year olds) |
| ER18 | Be able to access historic elector, address and canvass records (including both property and elector images) and to transfer records into current year’s register without overwriting historic record |
| ER19 | Be able to scan and store absent voting forms using a barcode or assigned using a search facility if no barcode is present as well as storing all personal identifiers for absent voters for use during postal vote opening at an election/referendum |
| ER20 | Find the correct previous Council or previous address within the borough for new Elector applications by search of postcode for previous address and provide the ability to link the elector for removal if they are within the borough |
| ER21 | Include a facility for anonymous registration with secure and protected links to the elector’s ID |
| ER22 | Have capacity to add identifiers or markers to electors and properties (such as marking Student Halls of Residence so that they can be excluded from the general canvass) and include the capacity to add additional identifiers or markers against property and elector records to meet any future requirements |
| ER23 | Have fully functional street indexes, showing Polling District, Ward, Parish, postcode etc |
| ER24 | Be capable of producing management information reports, segmented by area & street, on canvassing responses for future planning |
| ER25 | Allow for allocation of specific roads or properties within roads to each canvass to create canvasser areas that are different from the polling district scheme |
| ER26 | Identify properties that are not allocated to a canvass area |
| ER27 | Be capable of importing absent voter application forms attached to GMail adding the image to the appropriate workflow/work queue for user processing thus negating the need to print and scan application forms received by email |
| **Election Management Requirements** |
| EM1 | Manage and facilitate stand-alone or combined elections of any scale within the Borough differing franchises; including business improvement districts, council tax and neighbourhood referenda that are not necessarily coterminous with existing polling district boundaries |
| EM2 | Be able to produce and calculate timetables for all types of elections taking into account dies-non. |
| EM3 | Produce all statutory electoral notices |
| EM4 | Provide fully integrated functionality for postal voting, including checking of 100% of Postal Voting Statements with the ability to record the rejection reason, including where information is missing, and user flexibility to adjust level comparative benchmark |
| EM5 | Flag to record when postal votes are sent & returned and produce “marked register” report of postal voters |
| EM6 | Be able to record details of election candidates and agents that include include: all statutory information; expenses and deposits; additional fields for supplementary information and enable easy quality control of inputting |
| EM7 | Allow the user to record the contact details (including mobile telephone, landline, email address and postal address) of all candidates, election agents and other agents to allow the RO to communicate via a range of options either in bulk or individually |
| EM8 | Be able to produce nomination papers including all statutory and other information and the option to have them pre-populated with Ward/constituency/parish details etc or not |
| EM9 | Produce all paperwork necessary for appointment of polling and counting agents, notification to agents of specific activities during election period, and produce tickets for these as well as candidates, election agents and other attendees of the count |
| EM10 | Provide the ability to email all staff recorded in the system to invite them to apply for specific jobs at an election (i.e. polling station roles, count roles and postal vote opening roles) |
| EM11 | Give staff access to a self-service online system to check and provide their personal details (including bank account information and tax information) |
| EM12 | Produce payment forms and summaries for staff employed in election and canvassing activities. Integration to BACS and / or Payroll systems |
| EM13 | Store information and report on Electoral Support Staff (includes non-council employees) to include: name; contact details; car details; election employment history; current Polling Station allocation; absent vote details; payment information; immigration status/right to work; narration facility, photographs |
| EM14 | Store historic information and report on polling stations to include: Electoral areas; statistics; staff allocation; addresses; contacts/ key-holder details; hire charges; staff information; equipment requirements; narration facility and map/drawings |
| EM15 | Have functionality to manage and record all essential elements for giving-away or receiving electoral areas to or from neighbouring local authority ROs at Parliamentary or any other (e.g. neighbourhood planning referendum) polls |
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| **General System Requirements / Overall System Functionality** |
|  | **IMPORTANT CRITERIA** |
| G1 | Have an integrated ability to contact selected electors and other stakeholders in bulk at any time with queries or to provide a key message by email and SMS without the requirement to export data |
| G2 | Provide a flexible visual interface which can be spread across multiple monitors and allows for information to be displayed in the most convenient way for each individual user |
| G3 | Present all relevant information regarding an elector/property in one location to be viewed in a single window |
| G4 | Be able to support the export of data files by multiple users at the same time in different file formats |
| G5 | Allow for the creation of maps using LLPG/GIS data which can be used for canvassing/boundary reviews |
| G6 | Be capable of importing electronic copies of images and storing these images against property, elector, candidate, agent, venue and other records (e.g. documents, evidence of identity, polling place invoices, photos of venues, booking forms etc.) without the need to scan these images (e.g. an attachment to an email should be importable from GMail) |
| G7 | Have a comprehensive audit trail which tracks changes to information and creates a document history for candidates, agents, election/referendum and records the user, date and time of each transaction |
| **Electoral Registration Requirements** |
| ER1 | Allow for live elector records to be cut and pasted if the update that adds their name to the register has not yet been published |
| ER2 | Special category electors electors in a separate area from other verified electors when they are awaiting authorisation |
| ER3 | Allow for non-eligible electors to be recoded within the system at the property at which they are living to prevent re-chasing for ITRs |
| ER4 | Allow for an absent vote, such as an emergency proxy vote, to be applied to an elector without the requirement to scan an application form |
| ER5 | Be able to distribute register data directly from within the system to all document recipients (i.e. if they choose a data file the system should run, encrypt and email this file directly to the specific recipient rather than creating an export that then needs to be emailed to each person individually) |
| ER6 | Include changes for existing property details (e.g. address fields) as part of the monthly update |
| ER7 | Provide their own system for dealing with telephone and internet responses to HEF |
| ER8 | Postal vote records for special category electors should, by default, be linked to the correspondance address and updated to reflect changes in the correspondence address |
| ER9 | Link special category electors to their final 'ordinary' registration thus ensuring they are eligible and in the correct electoral area |
| ER10 | Prevent reminder correspondence being sent to overseas electors who have passed the statutory timeframe (e.g.15 years) |
| **Election Management Requirements** |
| EM1 | Have an integrated ability to correspond with polling places by email and include attachments where necessary |
| EM2 | Be able to scan and store an image of all election/referendum related forms and other correspondence against polling places, polling district, candidates, election agents and other stakeholders using a barcode or assigned using a search facility if no barcode is present |
| EM3 | Use technology to drive nominations and other contact with candidates, agents and other stakeholders towards ‘digital by default’ where possible whilst remaining within the statutory requirements |
| EM4 | Use technology to drive count processes including security, access and integrity towards digital by default whilst remaining within the statutory requirements |
| EM5 | Provide staff who need to attend a training session access to a self-service online system that shows them the available training slots in order for them to choose and change, if necessary, the training session they wish to attend |
| EM6 | The ability to contact all staff by email and SMS via an internal automated system without having to use a separate software or hardware which requires an export of data |
| EM7 | Produce election accounts and financial reports for Parliamentary and European Union Parliamentary elections and National Referendums in formats suitable for the Electoral Claims Unit |
| EM8 | Allocate ballot paper ranges for:- early issue requests (to include overseas addresses, BFPOs and requests)- ordinary postal voters (to include waiver electors, anonymous electors, postal proxy voters)- replacements for lost/spoilt ballot paper packs- polling station voters |
| EM9 | Allow defined user types the ability to 'change' a postal vote delivery address once data has been created thus producing 'change labels' with the amended delivery address preventing the need to cancel the postal vote and include in the next issue of postal votes |

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3. Requirements Part 1: Outputs and outcomes to be achieved

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| It is essential that the chosen software is:* A system that can run all statutory polls (combined and stand-alone) including parish, local government, Greater London Authority, UK Parliamentary, EU Parliamentary, national referenda, council tax referenda, neighbourhood planning referenda and Business Improvement District (BIDs) - be they scheduled or by-elections/’snap’ elections. In the case of neighbourhood planning referenda the system needs to be able to run referenda where the ‘referendum area’ is not necessarily coterminous with existing polling district boundaries
* A registration system that meets the statutory requirements of Individual Electoral Registration giving the Electoral Registration Officer the ability to publish, maintain and distribute an accurate register of electors, monthly updates, notices of alteration pending an election, absent voter record and other statutory and non-statutory registration data as is required
* In line with the council’s ‘digital by default’ policy:
1. Recruitment, appointment and contact of staff employed by the Returning Officer to be shifted to online by default by May 2018
2. Contact and collection of data/information from candidates, agents and other stakeholders to be shifted to email/SMS direct from EMS by default
3. Initial contact with electors to be shifted to email/SMS by default
4. Canvassing to be moved to tablet devices in time for the ‘Business As Usual’ canvass in spring 2018
* Electoral Management System that is innovative, adaptable and proactive and makes use of technological advancements to provide automated processes, wherever possible
* Procurement of an EMS (and the associated hardware) that is compliant with the Council’s Technical Standards and Security Principles, and integrates with Google apps wherever possible, particularly Gmail, enabling the electoral services team to fully move to a virtualised technical environment by December 2017.
* Unhindered access to data held by the EMS allowing the user to extract, interrogate and filter data in line with the requirements of the ERO/RO

A system meeting the above criteria would go a long way in moving the electoral services team to a more digitised working environment, reducing manual processes freeing up resources to concentrate on more complex issues.  |

4. Requirements Part 2: Technical Requirements

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| The Council’s ICT Technical Guidelines and Security Principles is appended to this document and provides an overview of the technical and operational environment, standard process and security controls. The expectation is that your solution must be able to work and be fully supported within this environment.[ICT Shared Service Technical Guidelines and Security Principles](https://drive.google.com/open?id=0B_UKTTyEPSw2R0h3UHRMcEQ4dmc)[Using systems and data policy](https://drive.google.com/open?id=0B7OnVR1L_q-5cmtGTWhac0lvaVBUeFY3MTNnV3NjYVB6dVcw) |

6. Performance requirements and how Key Performance Indicators will be monitored

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| 1. KPIs may be developed for this contract with the successful supplier and will be discussed once evaluations have been completed and the successful supplier has been identified. The supplier’s achievements against KPIs will be monitored through quarterly reviews and review meetings as appropriate.
2. The Council will keep an ‘issues log’ of any concerns raised in relation to the performance of the supplier This will be monitored and issues taken up with the supplier.
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7. Other details such as caveats, constraints or details about the procurement process

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| Below are key milestones for this contract.

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| **Key Milestone/ Activity** | **Timescale** | **Target start date** | **Target completion date** |
| Contract award | 2 days | 2/10/2017 | 2/10/2017 |
| Standstill | 10 days | 02/10/2017 | 12/10/2017 |
| Mobilisation | 6 weeks | 16/10/2017 | 1/12/2017 |
| Test Environment | 4 weeks | 6/11/2017 | 1/12/2017 |
| ‘Go Live’ | 2 days | 1/12/2017 | 4/12/2017 |
| Contract Management | 3 years | 16/10/2017 | 15/10/2020 |

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8. Appendices

* [ICT Shared Service Technical Guidelines and Security Principles](https://drive.google.com/open?id=0B_UKTTyEPSw2R0h3UHRMcEQ4dmc)
* Using systems and data policy