

ANNEX C – Presentation Agenda (this element is weighted to 10% of the total tender)

Tenderers will be required to make available key members of their delivery team who will be responsible for the provision of the Contract to attend a presentation to be held virtually via Microsoft Teams on 02/10/2025, 03/10/2025 and 06/10/2025.

Tenderers will be given the opportunity to present the key areas of their submission along with the functionality of their EHS Compliance system supported by demonstrating 'key features' relating to the core requirements of the modules included in the system. Where end-to-end demonstrations are requested as part of the sections below, please feel free to pre-populate fields in advance to ensure demonstrations are kept to time.

Sections 2, 3 and 4 (including all sub-sections) will be scored using scoring methodology as detailed in the Invitation to Tender document.

The Client may ask questions relating to the area being presented on.

The presentations will last no longer than 2 hours. An agenda is below along with the proportion of how much each section will contribute towards the overall % weighting.

1. Introduction – max 5 mins (not scored)

2. Supplier Presentation – max 10 mins (scored – 10% available for this section)

Bidders should present their proposed solution in line with their bid to the project team. Bidders should also focus on how they will execute the system to all end users based on the answers being provided as part of their submission. Bidders should use this time to provide step-by-step examples of how users would raise various cases on the system and show how these can be monitored and reported.

3. Supplier presentation of 'key features' – max 75 mins total (each element will be scored individually)

3.1. User Experience – max 10 mins (scored - 5% available for this section)

3.1.1. UI Consistency – Demonstrate how displays are tailored to different device types and orientation for both browser and app formats (where applicable)

3.2. Data Quality, Governance & Audit – max 5 mins (scored - 5% available for this section)

3.2.1. Audit trail of user activity (e.g. click audit)

3.3. Dashboards, Reporting & BI – max 10 mins (scored - 20% available for this section)

3.3.1. Show querying and analysis with multiple filters and search criteria, reporting on any data fields with extraction into a variety of Microsoft Office products, standard reports provided delivered primarily via dashboards for Accidents & Incidents, Near Misses & Positive Interventions. Generating one-off, user specific reports with reference to empowering staff to generate these themselves, and customisable dashboard with drill down on widgets.

3.4. Workflow and Case Management – max 15 mins (scored - 20% available for this section)

3.4.1. Creating a case (a case should be an Accident / Incident for the purpose of this part of the demo), and show the end-to-end process from event generation to case closure, including the ability to keep a case 'under review' for regular checks. Generating and closing action logs / escalation process where actions aren't completed in the timescale requested. Must cover internal and external actions. Ability to attach evidence to each action progress utilising a variety of document types, from both internally and externally raised actions.

3.5. Mobile / Remote or Agile Working – max 5 mins (scored - 5% available for this section)

3.5.1. Demonstrate how your solution integrates with user's workflows

3.5.2. Field or remote staff ability to perform activities from an appropriate mobile device, this includes the ability to complete Accidents & Incidents, Near Misses & Positive Interventions, whether on or offline and how offline work synchs once back online.

3.6. Risk Assessments – max 5 mins (scored - 5% available for this section)

3.6.1. How are these Assessments raised, how is it signed off by a user / manager – how are the relevant people notified when the assessment is due for review (e.g. annually). What does the end user see in terms of the completed documentation. How are these accessed via the main system / mobile devices?

3.7. COSHH Assessments – max 5 mins (scored - 5% available for this section)

3.7.1. As per Risk Assessments

3.8. DSE Assessments – max 5 mins (scored - 5% available for this section)

3.8.1. As per Risk Assessments – also show how you restrict access to relevant users in line with current GDPR guidelines.

3.9. Manual Handling Assessments – max 5 mins (scored - 5% available for this section)

3.9.1. As per Risk Assessments

3.10. Noise Assessments – max 5 mins (scored - 5% available for this section)

3.10.1. As per Risk Assessments

3.11. Accidents & Incidents Module – max 5 mins (scored - 5% available for this section)

3.11.1. Creating a case (a case should be Near Miss / Positive Intervention for the purpose of this part of the demo), and show the end-to-end process from event generation to case closure.

3.11.2. Verbally confirm that this follows the same process as accidents and incidents as per the Workflow and Case Management part of the demo, regarding the ability to keep a case 'under review' for regular checks. Generating and closing action logs / escalation process where actions aren't completed in the timescale requested. Must cover internal and external actions. Ability to attach evidence to each action progress utilising a variety of document types, from both internally and externally raised actions.

4. Supplier presentation of additional optional features – max 10 mins total (scored - 5% available for this section, scored collectively)

4.1. Time to be used to demonstrate how a supplier's solution can assist with the Cartrefi Conwy's non-critical requirements, including; Asset management, Contractor management

4.1.1. Environmental management – this area would be the focus of this time – at least 5 mins.

- Show a high-level overview of the capabilities of the proposed Environment Module within your system. Demonstrate how the module supports effective environmental compliance, performance monitoring, and sustainability reporting.

5. Questions from the Project team – max 10 mins (not scored)
6. Supplier summary – max 5 mins (not scored)
7. Supplier dismissal and evaluator debrief – max 5 mins (internal discussion, not scored)