Invitation to Tender –

IIE Portal

Background

PECT is a registered charity with a long-standing mission to support sustainable places, thriving communities, and positive environmental action. PECT operates **Investors in the Environment (iiE)**, a national environmental accreditation scheme supporting organisations to reduce environmental impact through a structured, auditable framework of continual improvement.

The iiE programme has grown significantly and now serves a diverse membership base ranging from SMEs to large public sector institutions. To support this growth and ensure the long-term integrity of the accreditation scheme, iiE requires a modern, robust digital platform to replace its existing Excel-based and semi-manual systems.

PECT invites tenders from suitably experienced suppliers for the **design and development of a new iiE Online Portal**.

Project Summary

The iiE Online Portal will be a secure, scalable SaaS platform that enables member organisations to:

- Configure organisational structures
- Record and analyse environmental resource data
- Calculate carbon emissions
- Set and track objectives and actions
- Submit audit evidence
- Receive accreditation outcomes

The portal will also provide iiE auditors with dedicated tools to assess submissions, apply scoring consistently, and generate audit reports.

The system must be audit-grade, deterministic, and capable of supporting iiE's continued growth without increasing audit effort per member.

Definition of Success

The iiE Online Portal will be considered successful when:

- Identical data inputs consistently produce identical audit and accreditation outcomes
- Auditors can trace every score and decision back to source data and uploaded evidence
- Members can complete a full reporting year end-to-end with minimal iiE support
- The platform enables iiE to scale membership without increasing audit time per organisation

Current System and Need for Change

The current iiE system relies on a suite of Excel-based tools and semi-automated processes for data collection, carbon footprint calculation, and audit management. While this has supported early programme growth, it presents significant challenges, including:

- Usability barriers for members.
- High ongoing support and validation overhead.
- Fragmented tools and duplicated data.
- Limited real time insight and trend analysis.
- Scalability constraints for audits and accreditation.
- Cross-member comparison and benchmarking unfeasible.

A new digital platform is required to address these issues and future-proof the iiE programme.

Scope of the Tender

The scope of this tender includes the design, development, testing, and initial support of an online portal comprising:

- Member Resource Measurement and Tracking
- Carbon Footprint Calculation and Reporting
- Objectives and Action Planning
- Audit Submission Tool (member-facing)
- Auditor Assessment and Reporting Tool (iiE-only)
- Administration and reporting features (including member benchmarking)

The solution must also support defined interoperability with:

- The existing iiE website (WordPress) for authentication, events, and learning resources
- HubSpot CRM for membership and event-related data

Tight coupling should be avoided; the portal must function independently if external systems are unavailable.

Out of Scope (Initial release)

The following are explicitly out of scope for the initial contract unless separately agreed:

- Billing and financial management
- Automated third-party data integrations (utilities, travel providers)

Detailed Specification of Requirements

At high level, the platform must provide:

Dashboard

- ✅ User and organisation details
- ✅ Membership status
- ✅ Navigation across portal modules
- ✅ Links to iiE website content and events

Organisation Setup

- ✅ Configuration of organisations, divisions, sites, users, and permissions
- ✅ Definition of reporting years and baseline periods

Resource Tracker

- ✅ Configurable resource categories, units, and groupings
- ✅ Secure data entry, bulk upload, export, and reminders
- ✅ Real-time performance visualisation

Carbon Footprint

- ✅ Automatic calculation from resource data
- ✅ Support for supplementary emissions, homeworking, and offsets (tracking only)
- ✅ Scope 1, 2, and 3 calculations using UK Government conversion factors (provided by iiE)
- ✅ Real-time performance visualisation

Audit Tool

- ✅ Guided audit questionnaires
- ✅ Evidence upload and management
- ✅ Integration with resource, objective, and action data
- ✅ Deterministic scoring and report generation

Auditor Tools

- ✅ Restricted auditor access
- ✅ Evidence review and scoring
- ✅ Audit report creation

AI-assisted functionality for auditors may be proposed as an **optional enhancement**.

Delivery Expectations

Suppliers must describe their proposed delivery approach, including:

- Discovery and validation activities
- Design and development
- Testing strategy (including data integrity and audit traceability)

- Acceptance and handover

The iiE Product Requirements Document (PRD) forms the definition of scope, outcomes, and acceptance criteria. The Figma design provides visualisation to provide better insight into delivery expectations only and is not intended to be authoritative.

Data, Security, and Hosting

- The platform must be GDPR-compliant and secure
- Role-based access control is required
- Evidence storage must be secure, auditable, and scalable
- SharePoint integration is a preference, not a requirement
- Suppliers must describe how hosting meets low carbon requirements (e.g. renewable energy sourcing)

Project Timeline

Stage	Date
Invitation to Tender Issued	23/03/2026
Deadline for Clarification Queries	10/04/2026
Tender Submission Deadline	17/04/2026
Evaluation of Submissions	WC 20/04/2026
Tender Presentations to Board	TBC

Project kick off and launch dates to be agreed with the appointed supplier

Evaluation Criteria

Criteria	Weighting
Experience	20%
Approach and Methodology	30%
Environmental Credentials	10%
Cost	40%

Total Quality (Experience + Approach + Environmental): 60%

Cost Evaluation

Cost submissions will be evaluated using the following formula:

Percentage Score = 40% x (Lowest Fee / Tenderer Fee)

The lowest valid cost proposal will receive the full 40% available under the cost criteria. Other submissions will be scored proportionally.

All pricing must be fixed and inclusive of expenses, with VAT listed separately. Assumptions and exclusions should be clearly stated.

Mapping of ITT Evaluation Criteria to PRD Acceptance Criteria

To ensure transparency and defensibility of the procurement process, the evaluation criteria above map directly to the acceptance criteria defined in the iiE Product Requirements Document (PRD). Bidders should ensure their responses clearly address the relevant PRD outcomes.

ITT Evaluation Criterion	What Evaluators Will Look For
Relevant Experience (20%)	Demonstrated delivery of complex, rules-driven, auditable platforms; evidence of handling regulated scoring, data traceability, or accreditation systems
Approach and Methodology (30%)	Clear delivery plan covering discovery, validation, design handover, implementation, and testing of complex logic
Environmental Credentials (10%)	Credible approach to sustainable hosting, delivery practices, and organisation environmental responsibility
Cost (40%)	Realistic, transparent pricing aligned to scope and delivery risk; clear assumptions and support model

Evaluators will score submissions based on how convincingly suppliers demonstrate that their proposed solution will meet the PRD acceptance criteria, not simply on feature delivery.

Required Tender Response Structure

Tender submissions **must** be structured under the following headings:

1. Understanding of the iiE programme and problem context
2. Proposed technical and architectural approach
3. Delivery plan and governance
4. Risk identification and mitigation
5. Cost breakdown and assumptions
6. Ongoing support and maintenance model

Submission Requirements

Submissions must include:

- Organisation and team details
  - Full legal name of the company
  - Registered office address
  - Company registration number and date of incorporation
  - VAT number (if applicable)
  - Primary contact name, position, phone number, and email address
  - Named delivery roles
- Relevant experience and case studies
- Technical approach and testing methodology
- Environmental policy or practices
- Full cost breakdown (including hosting and support)
- Availability for Board presentation
- Two client references

Terms and Conditions

All submitted proposals will be subject to PECT's standard terms and conditions of contract. A copy of these terms can be provided on request or included during contract negotiation.

PECT will retain full ownership of all Intellectual Property (IP) arising from the development of the iiE Portal.

How to Apply

Please email your tender submission to: David.Knight@iie.uk.com
Subject: iiE_PORTAL_DEV_2025_001 – Portal Development Tender Response

We welcome the opportunity to discuss our requirements further with interested suppliers prior to submission, to ensure an optimal development solution and to consider any viable alternatives.