QUESTION 2.3.2. The UNION - DIGITAL MARKETING SENIOR MANAGEMENT CVs.

UNION - DIGITAL MARKETING TEAM

KEY
☐ Senior Management
⠿ Support Staff
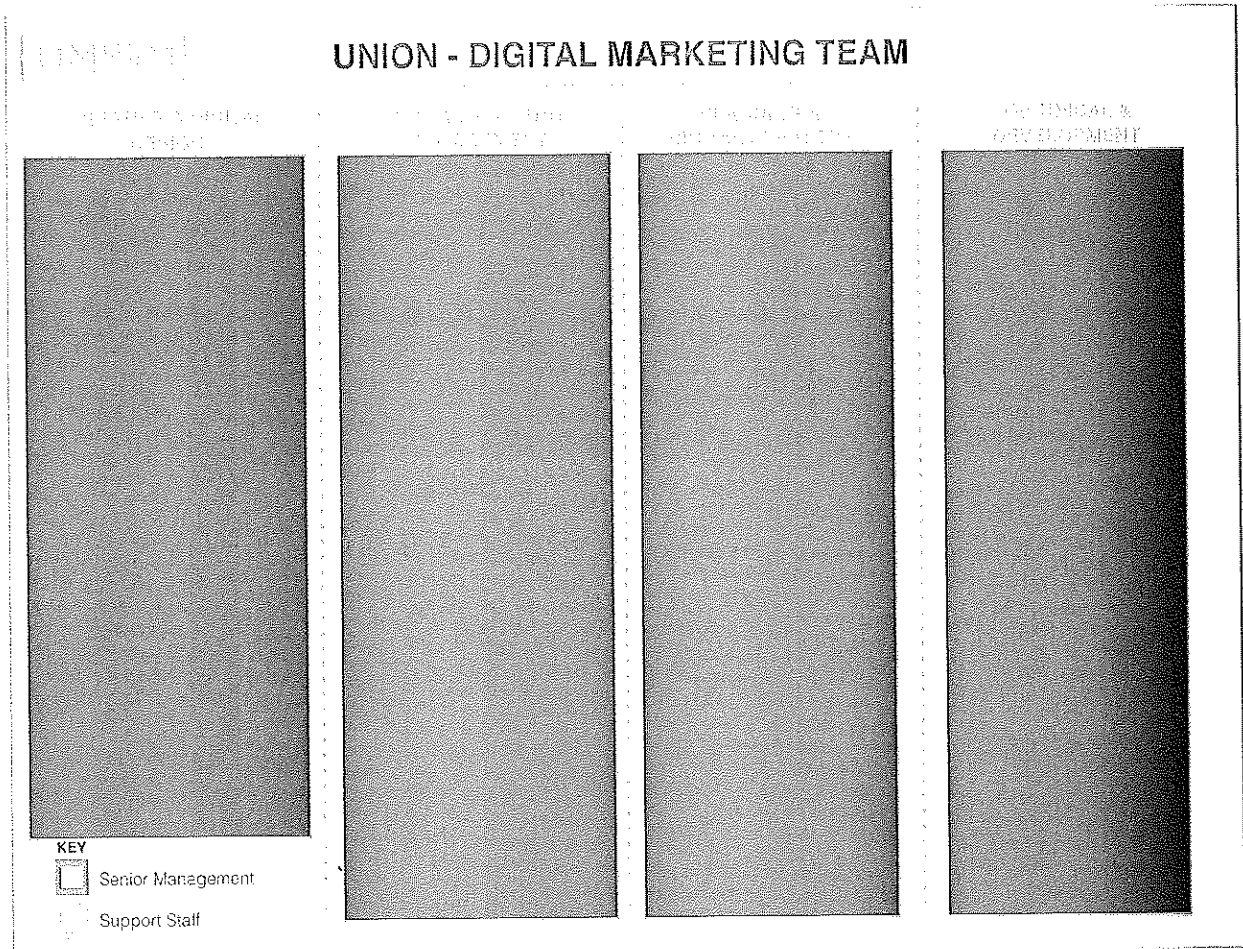
CV INFORMATION – 16 PAGES REMOVED – EXEMPT UNDER FOISA section 38(1)(b)

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Question 2.3.3 - Weighting - 30% (Word Count 1500)

Business Management - In order to meet the contract management requirements outlined in Schedule 1 and Schedule 1A of the Entire Agreement, the Contractor must have well established formal tracking tools and processes to deliver the service, ensuring business continuity at all times. These must be used as a formal monitoring mechanism within your organisation. Please provide a detailed breakdown of your processes for tracking and delivery, paying particular consideration to the following:

- *details of all tools and processes to track and report on progress of tasks and how you keep abreast of the latest tools and technologies in the sector;*
- *details of the management reporting arrangements employed to monitor tasks;*
- *details of how these outputs will contribute to the management of risk and inform future activities;*
- *details of formal methods/process for identifying and addressing errors or under delivery including how and at what stage the client is informed.*
- *provide examples of the management information and details of any additional management information that will be available, including frequency. Outline how all of this will be used to identify and manage activity across the framework.*
- *details of any business continuity management standards applicable e.g. ISO 22301, and the processes and procedures in place to ensure the service is delivered in the event of an emergency situation occurring.*

### 2.3.3. BUSINESS MANAGEMENT

TOOLS AND PROCESSES

To track and report on the progress of tasks we have robust tools and processes.

Our Synergist project tracking and reporting tool logs all tasks and assigns a unique reference. Staff time and production fees are allocated, generating a Timing Plan and Cost Estimate.

The tool allows for information management, resource scheduling and finance integration, ensuring all tasks stay on time and budget. Specifically:

- How a task is progressing against time and budget
- Who has, is and will be working on a task
- Which tasks are due to hit which department and when
- The status of tasks.
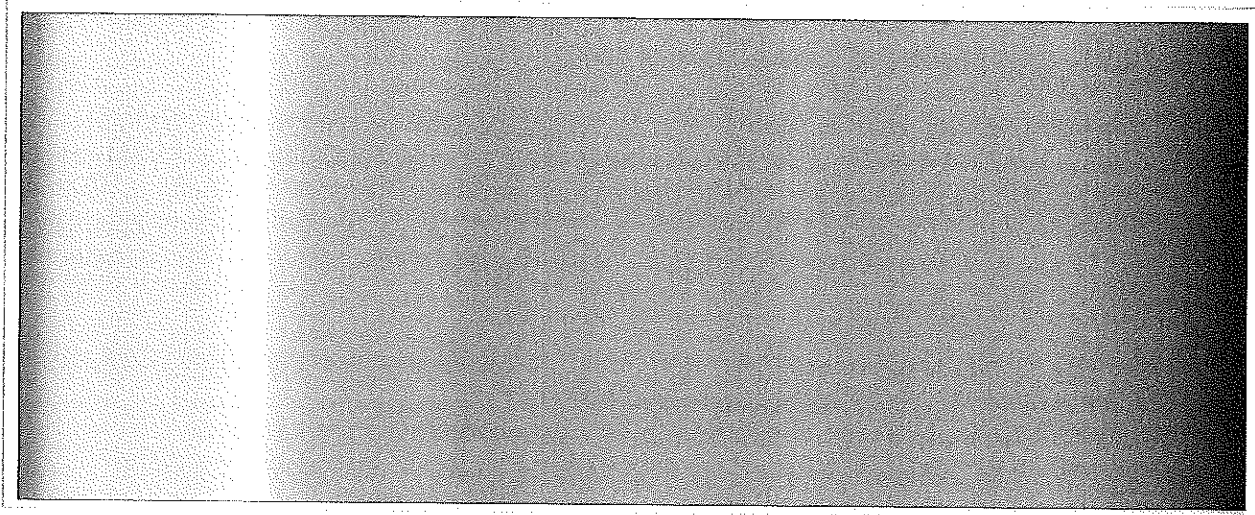
— *the sector's leading Project Management System.*

Traffic Manager, [redacted] chairs weekly Production Meetings with Account Directors to assess progress of existing tasks/ensure resource. Daily meetings are held to ensure that new tasks are allocated resource.

Head of Digital (HoD), [redacted] chairs Monday morning Development Scheduling meetings to allocate projects and review resource. We use [redacted]
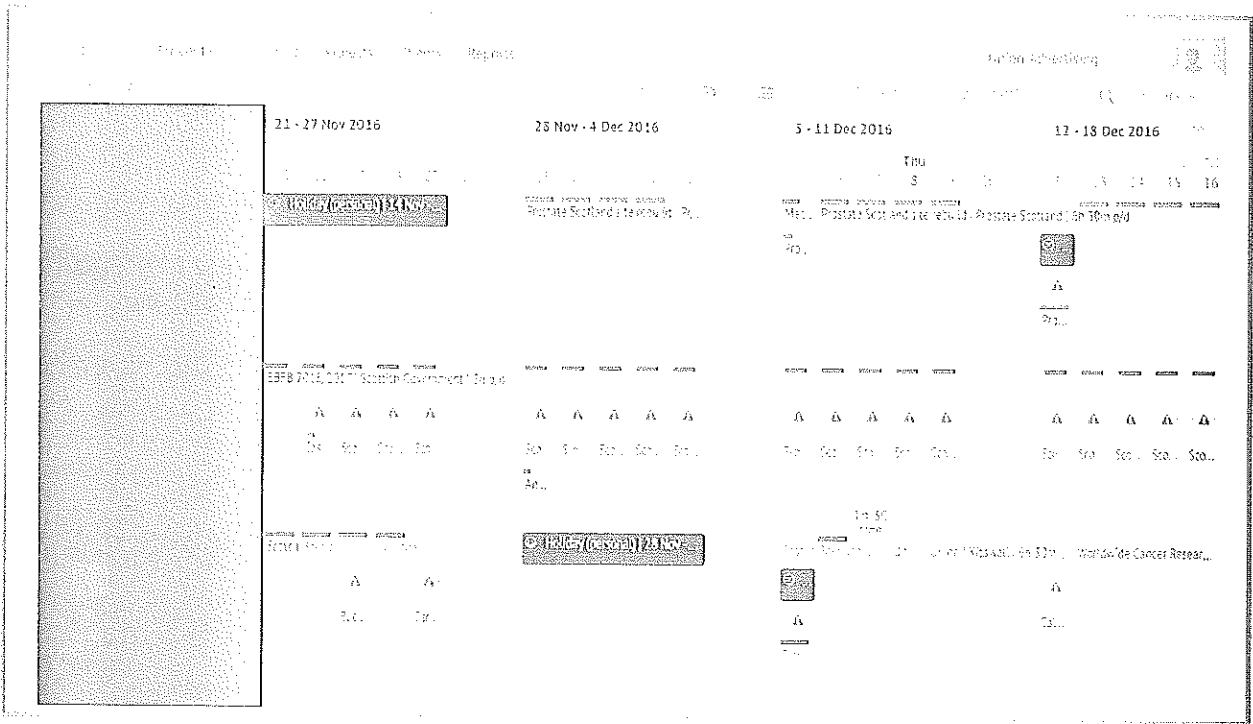
[redacted] for Development scheduling.

We keep abreast of the latest tracking and reporting tools and technologies.

Member access to the IPA Advisory Service provides us with bi-annual information on market dynamics, including reporting tools.

Our IT Manager, ▮▮▮▮▮▮ monitors ▮▮▮▮▮▮ performance, providing monthly reports for the Board.

MANAGEMENT REPORTING

The Union has a number of management reporting arrangements in place.

The Digital Account Director/Technical Director/Lead Digital Strategist report formally to HoD on project KPIs and client service/performance, based on statistical performance/client feedback. HoD also seeks direct feedback and disseminates this through internal meetings.

We report/analyse on digital/web project to clients using ▮▮▮▮▮▮▮▮▮▮

JIRA KANBAN BOARD & GOOGLE ANALYTICS   CUSTOMISED DASHBOARD REPORTING
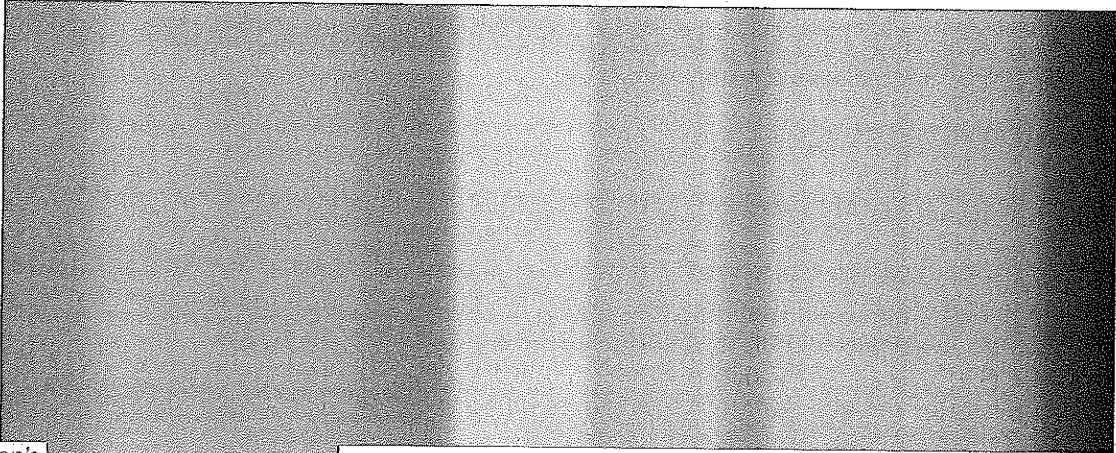
Examples of management information formats.

▮▮▮▮▮▮▮▮▮▮▮▮ which allows us to identify areas for improvement, and for performance issues to be rectified.

AGENCY PERFORMANCE MONITOR

The Union's

Board meetings have an agenda item, 'Client Health', based on our 'Traffic Light' report. **Escalation procedures are enacted where appropriate.**

We review the performance of sub-contractors annually, identifying areas for improvement.

On-going project metrics - response/click-through rates/competition entries - provide 'real time' performance. For example, where a particular creative treatment/website might not be effective, we can respond immediately.

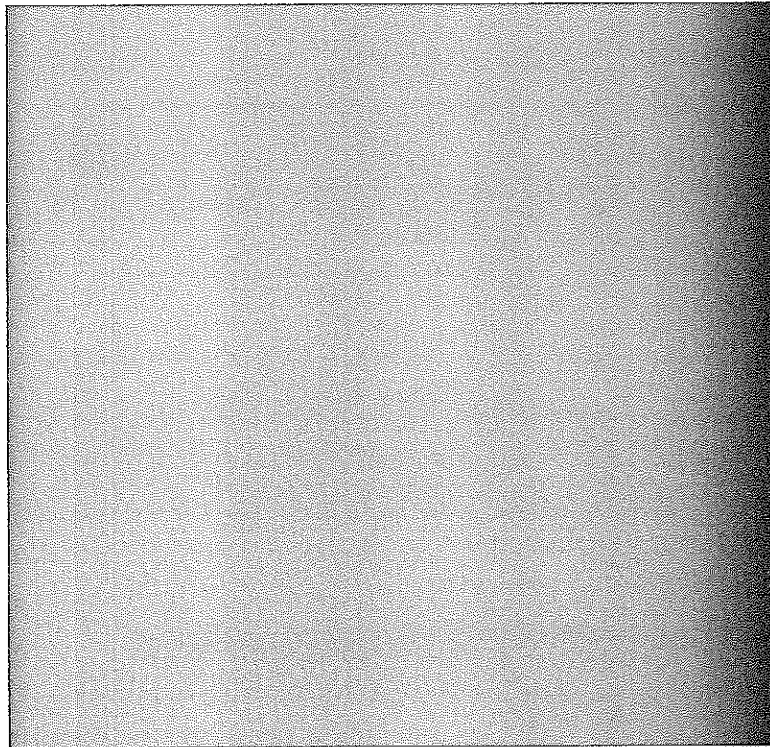ROI analysis is a key discipline, allowing comparisons with similar activity.
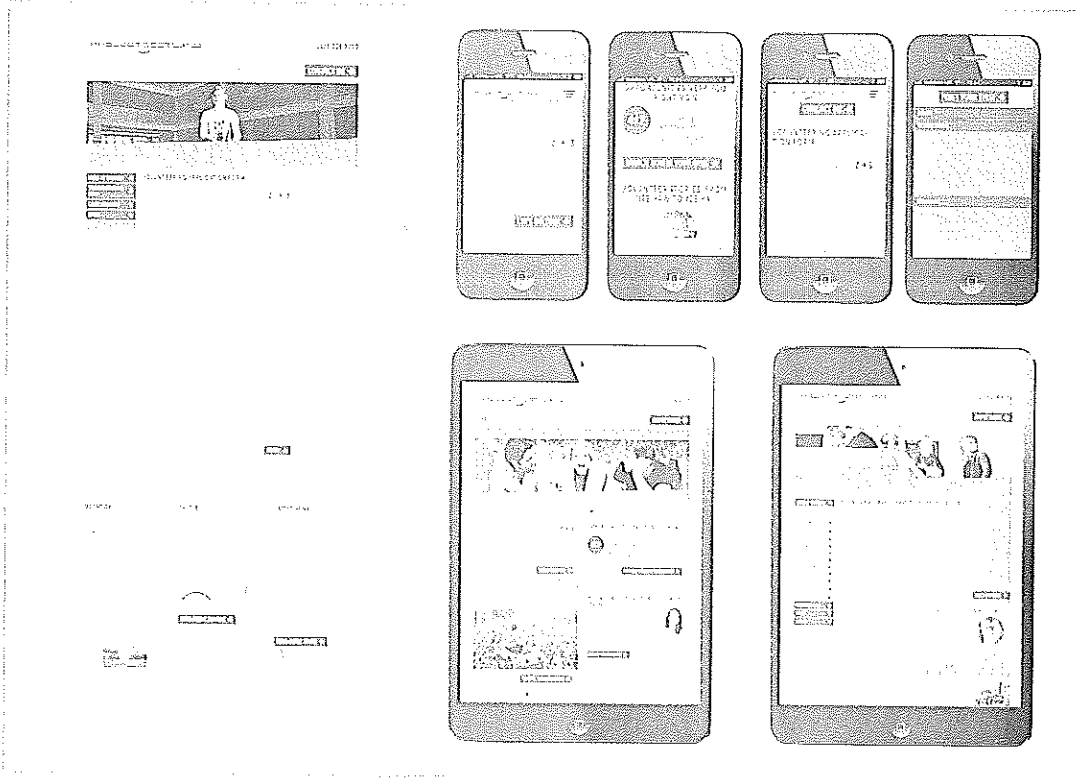
ProjectScotland website improved applications by [   ] *- multiple award winner. ROI* [   ]

MANAGING RISK

We use information from

OUR RISK MANAGEMENT PROCESS

*The Union's Risk Management process.*

This process allows us to:

- Identify potential risk through data or observation
- Assess risk – seriousness/likelihood
- Plan for specific scenarios
- Implement actions to prevent occurrence/acting if it can't be prevented

At its heart is communication - to staff and sub-contractors. Senior Management take responsibility for client tasks, and disseminate to team members as appropriate.
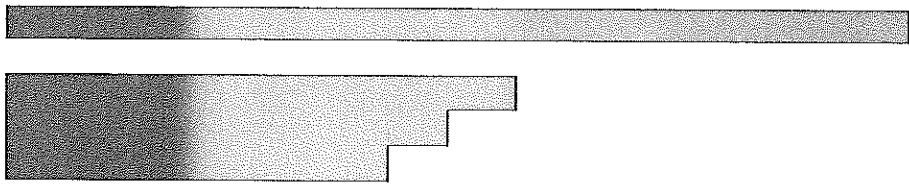
INFORMING FUTURE ACTIVITIES

The information ensures Continuous Quality Improvement (CQI), allowing us to meet or exceed the expectations of clients. Our CQI follows a structured process:
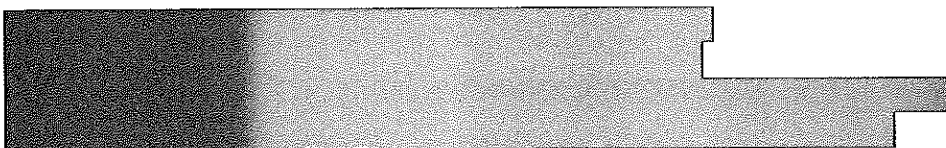
CONTINUOUS QUALITY IMPROVEMENT MODEL
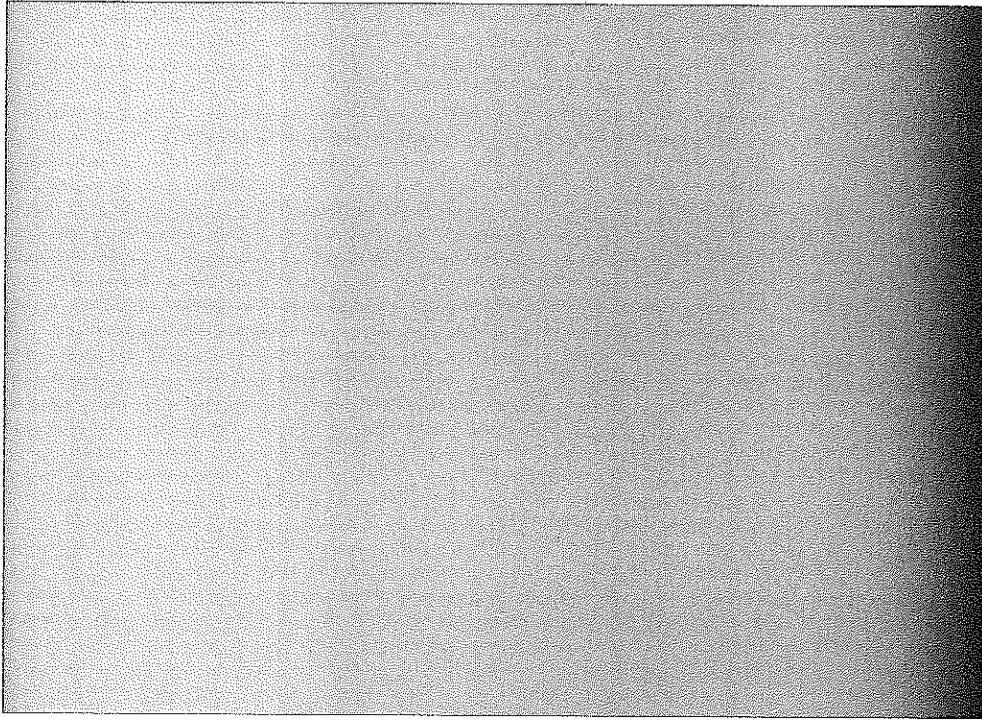
The Union's structured CQI process.

We interweave CQI it into everyday work. Staff are encouraged to feedback their own views and empowered to develop processes to improve future tasks. Senior Managers then ensure that new processes are implemented.
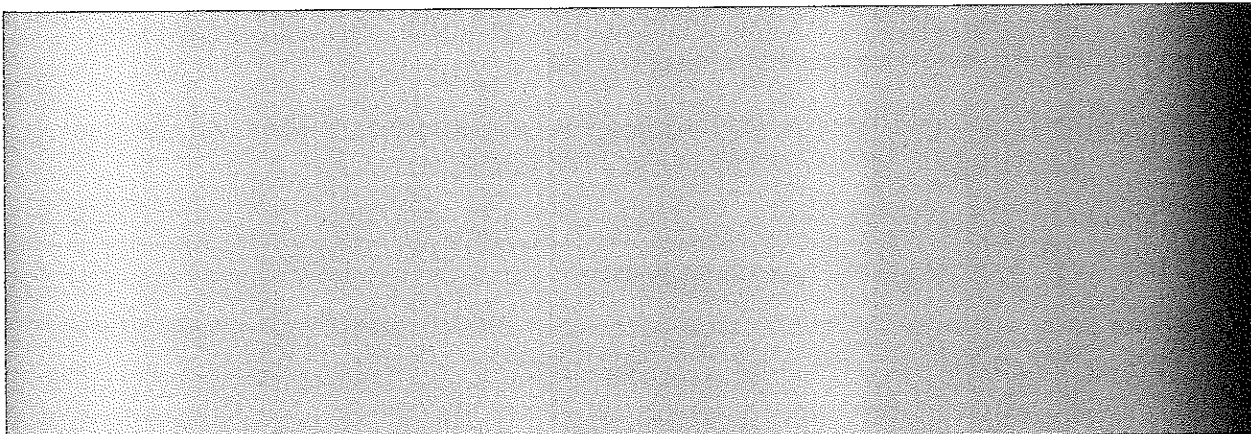
PROCESS FOR IDENTIFYING ERRORS/UNDER DELIVERY

The Union's formal process to identify errors or under-delivery is based on the measures through ▮▮▮▮▮, management reporting, project data, and client interaction. For example:
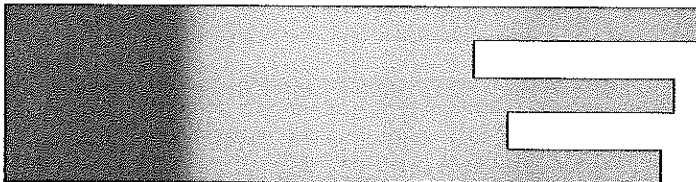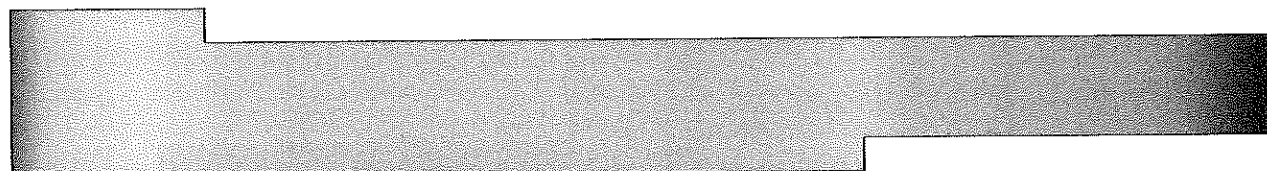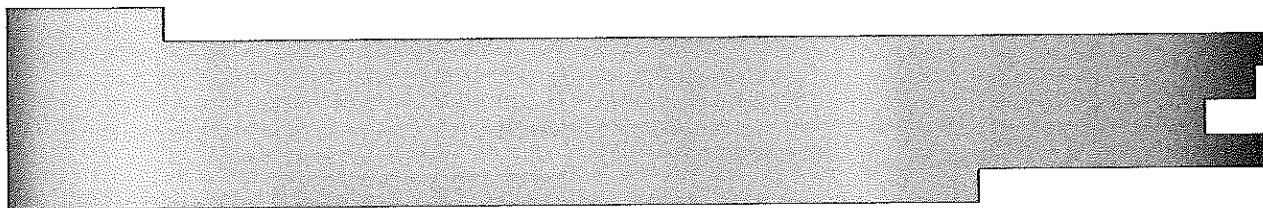
ADDRESSING ERRORS/UNDER DELIVERY

To address errors or under-delivery we deploy our Escalation Process:

ESCALATION PROCESS

Our Escalation Process.

EXAMPLES OF MANAGEMENT INFORMATION

The Union provides regular management information to clients throughout the course of a task.

Timing plans are prepared and circulated to the client from the outset. This gives an at-a-glance view of project delivery and key milestones. It also facilitates easier transfer of projects between team members at the PSB when required.

A Cost Estimate is provided to the client at the beginning of a task, based on the agreed Framework rate-card, proposed Media Plan if applicable, and any external production costs. We provide consistent estimates based on the amount of hours we expect a task to take and the production requirements. This provides complete transparency on all aspects of the project budget.

We will provide weekly Status Reports to ensure all parties are aware of what stage the project is at and can highlight any delays that may arise.

These are referred to at Status Meetings, the regularity of which is agreed with the client. For short lead-time projects, meetings tend to be more frequent.

Our ethos is that communication is key to a successful relationship, thus regular day-to-day contact will be maintained through telephone and email.

Finally, a Contact Report will be provided following any detailed call or meeting that has clear actions, allowing all to be aware of and the timings associated.

ESTIMATE	CONTACT REPORT	STATUS REPORT & TIMING PLAN

Reporting and management information templates.

This gives both agency and client visibility of agreement and allocation of tasks, as well as providing on-going information to the project team.

Ongoing data and metrics is also supplied and visible to the client through dashboards, Jira software and Google Analytics as described above.

BUSINESS CONTINUITY MANAGEMENT

We follow the principles set out in ISO 22301 when developing and maintaining our Business Continuity Plan (BCP), which lists all possible threats to the agency, potential losses incurred, and processes, procedures and standards to mitigate against causing disruption to business.

Business Continuity Plan
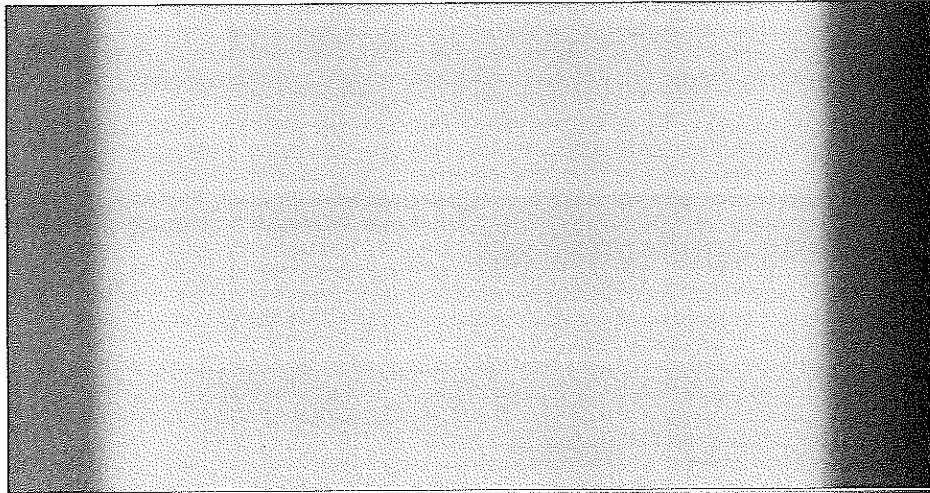
The Union's BCP structure.

EMERGENCY SITUATION PROCESSES AND PROCEDURES

Through the BCP The Union has a clear process in place to ensure service delivery in the event of an emergency situation.

EMERGENCY SITUATION RESPONSE MODEL
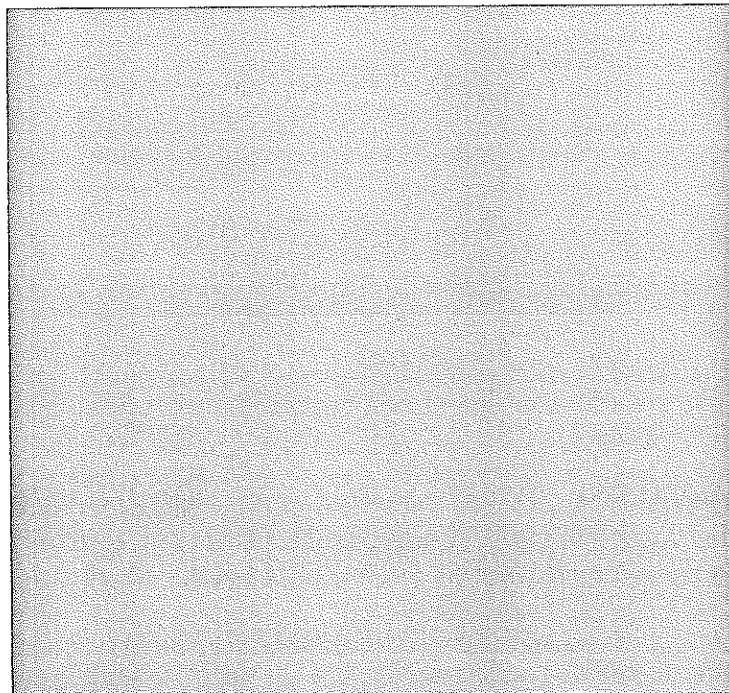
Our ██████████████ for emergency situations.

We have a data backup structure – internal and external so we can access all task files as required.
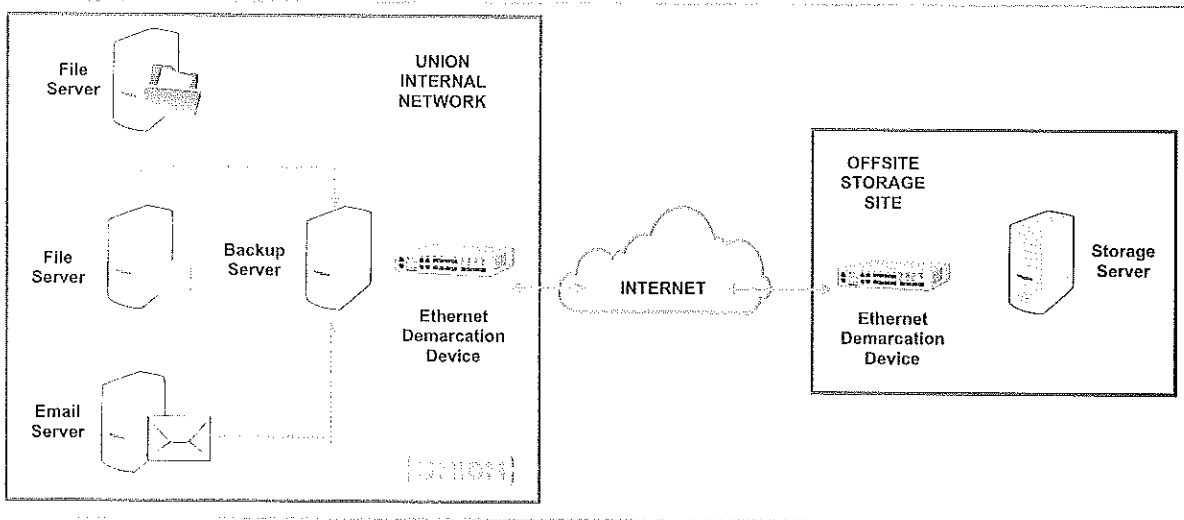
Backup structure.

With no physical access to the office, all clients and suppliers are provided staff mobile numbers, stored on two external FTP servers.

If an alternative office location is required, all telephone traffic is forwarded onto numbers at the temporary location. In the event that there is no access to servers/desktop machines, devices would be rented through Hamilton Rentals, with software pre-installed, allowing work within 24 hours.

We have alternative instant office availability across the UK with Clydesdale Bank, or our Leeds office.

[1,456]

Question 2.3.4 (Weighting - 10%) (Word Count 1200)

Business Continuity and Cyber Resilience - A key element of the service will be the Contractor's Business Continuity in respect of Cyber Resilience services. Tenderers should provide details of any standards applicable in this area (e.g. ISO 27001, ISO 22301, ISO/IEC 20000, Cyber Essentials/Cyber Essentials Plus or their equivalents), advise whether any certifications are held and provide details of any plans to achieve any certification. Tenderers must also describe their procedures to ensure continuity of service and protection against cyber-attacks, paying particular attention to the following:-

- *details of processes followed including those for assessing future risks;*
- *testing of Disaster Recovery policies and procedures, including the dates, duration and frequency;*
- *methods for the back-up of delivering services should an incident occur including manpower and access to equipment;*
- *methods in place to mitigate against cyber-attack and crime using online technologies including processes relating to Boundary Firewalls and Internet Gateways, Secure Configuration, Access Control, Malware Protection and Patch Management;*

Tenderers should refer to the UK Governments Cyber Essentials Scheme and consider the information included within the scheme when providing their response to this section. (https://www.gov.uk/government/publications/cyber-essentials-scheme-overview)

Where applicable, Tenderers must ensure that any sub-contractors appointed to deliver any of the services have Business Continuity and Cyber Resilience measures in place.

2.3.4. HOW WE ENSURE BUSINESS CONTINUITY AND PROTECTION AGAINST CYBER-ATTACKS

To ensure continuity of service we follow the principles of **ISO 22301** and have designed our **Business Continuity Plan** in line with this. We aim to have full **ISO 22301** certification in 2017.

In order to mitigate against Phishing and Hacking we follow the recommendations of **HM Government Cyber Essentials Scheme.** Our application for this is currently with the certification body for approval.

We have identified the likelihood and potential impact of factors which may disrupt the business. Critical business processes have then been identified, as have the assets required to deliver these processes.

Every effort has been made to ensure that adequate financial, organisational, technical and environmental resource is available. The safety of staff and systems has been placed at the heart of this process. Adequate insurance is in place to cover any potential risk, and funds would be available to hire equipment and relocate the company to work from serviced offices in Edinburgh should the need arise.

DISASTER RECOVERY PROCESSES TO ENSURE CONTINUITY OF SERVICE

Assessing future risks

We continually review and assess the business continuity risks. Any changes are implemented and staff are informed and trained on these changes at Union Academy sessions.

Testing of Disaster Recovery policies

The Disaster Recover plan is tested

Mitigating against data loss

Data loss can result from

BACK UP SYSTEMS TO ENSURE CONTINUITY

BACKUP SCHEDULE

Data Location	Schedule	Backup Type	Retention
Primary File Servers	Monthly	Full	1 year
	Daily	Incremental	1 month
Exchange email	Monthly	Full	1 year
	Weekly	Full	1 month
	Daily	Full	1 week
Archive Server	Monthly	Full	1 year

Union backup schedule.

The data flow is as follows:
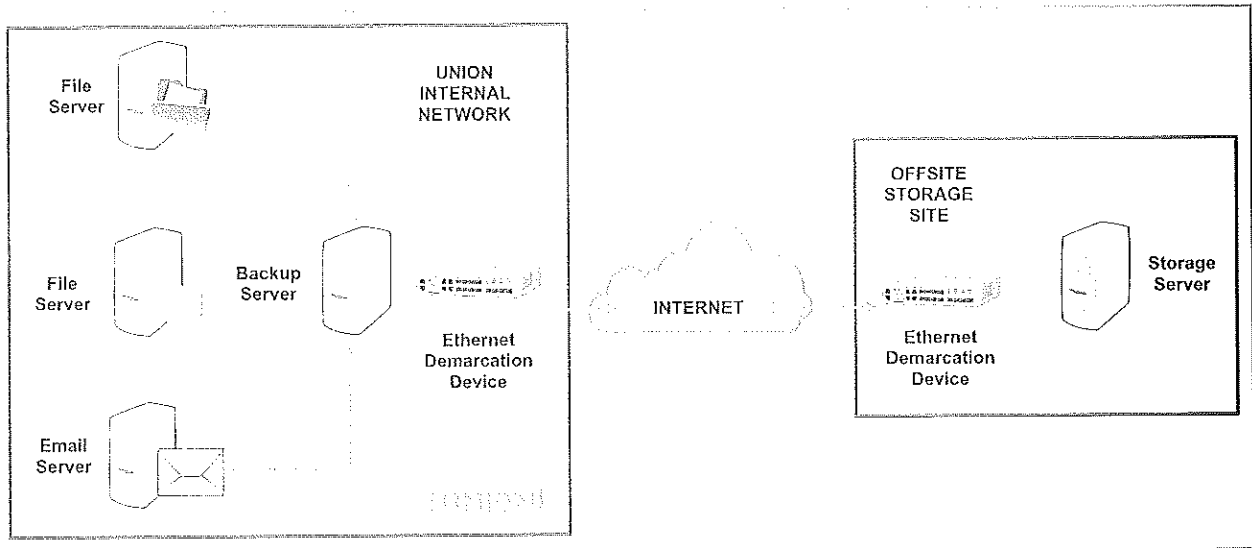
Union data flow.

Offsite storage

Mitigate power failure

Remote access to servers

Maintain communications

Equipment rental

METHODS TO MITIGATE AGAINST CYBER ATTACKS

The methods we use to protect against these types of attacks are:

[1,197]

2.4 Sustainability/Corporate Social Responsibility (Weighting 0%)

Question 2.4.2 (Weighting - 0%) (Word Count 100)

Tenderers must confirm that, where appropriate, they will support the Scottish Ministers policies on Sustainability and Corporate Social Responsibility in delivering the service required.

2.4.2. SUSTAINABILITY AND CORPORATE SOCIAL RESPONSIBILITY

Sustainable procurement is defined as: *"A process whereby organisations meet their needs for goods, services, works and utilities in a way that achieves value for money on a whole life basis and generates benefits not only to the organisation, but also to society, the economy and the environment".* - Scottish Sustainable Procurement Action Plan, October 28, 2009.

The Union confirms that we will support Scottish Ministers' policies on Sustainability and Corporate Social Responsibility in delivering the Framework contract.

We have a strong track record in this area, and will continue to support the Scottish Government in its CSR objectives.

Question 2.5.2 (Weighting - 100%) (Word Count 800)

Please describe how your organisation proposes to commit to being a best practice employer in order to support these Scottish Ministers workforce policies in the delivery of this Framework. Answers need not be constrained to or be reflective of any examples given alongside this question.

The tenderer should take the engagement and empowerment of staff seriously; take a positive approach to rewarding staff at a level that helps tackle poverty (e.g. through a commitment to paying at least the living wage), provide skills and training which help staff fulfil their potential, that you do not unfairly exploit staff (e.g. in relation to matters such as the inappropriate use of zero hours contracts): that your company will demonstrate organisational integrity with regards to the delivery of those policies. This reassurance should be achieved by providing tangible and measurable examples that can be monitored and reported as part of on-going contract management.

2.5.2. WORKFORCE BENEFITS

As a best practice employer, we have a range of policies and procedures focused on engaging with and empowering each member of our workforce with positive employment terms and conditions. Our policies are aligned with the Scottish Ministers' workforce policies and the Fair Work Convention. This will continue through the duration of the contract, and we will monitor and report on it.

ENGAGING AND EMPOWERING STAFF

Our board members have an 'open door' policy, aiding transparency and allowing staff to communicate their needs.

We encourage a growth mindset where people are empowered to influence agency life. We adopt 360-degree information exchange through a Staff Survey and twice yearly appraisals that highlight successes and opportunity for development.

Staff meetings are held monthly.

REWARDING STAFF

All of our employees were paid the Living Wage well in advance of its implementation. We are an Accredited Employer. We have amended our contract with our cleaning company to ensure that everyone working in our building is paid the Living Wage.