Creating a new requirement

Your guide to how to create a new project requirement through Pro-Vide 2.0

Contents

The Customer Requirement Form (CRF) is the first step in the procurement process.

It captures both the specification (which can be uploaded) and the parameters, rules and regulations through which the procurement will be run.

To access the CRF follow the link below:

Bloom Customer Requirement Form

Once submitted, the requirement will become a requisition. Depending on your agreed workflow, it will be reviewed by an internal gatekeeper, before passing to Bloom who will again review and start the process of creating the Invitation to Tender (ITT).

If your internal gatekeeper or Bloom have questions or edits, the requirement may be passed back to you for further information to be added.

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Starting the customer requirement form

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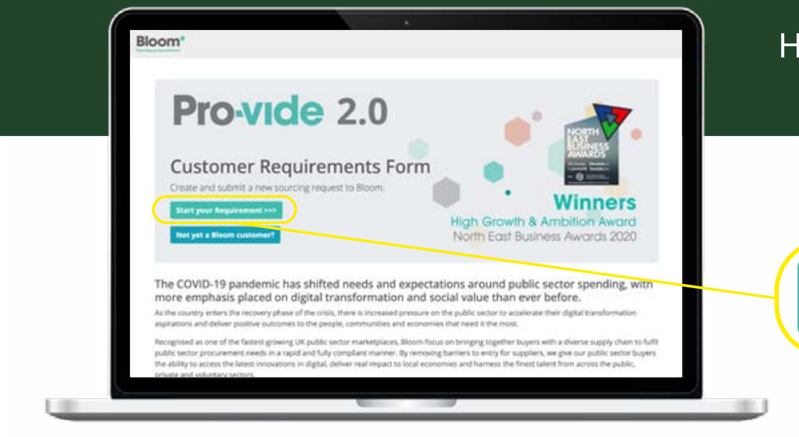
Starting the customer requirement form

1 Access Customer Requirement Landing Page by following the link below:

Bloom Customer Requirement Form

Here you can find template documents and Pro-Vide 2.0 guides.



2 Click to start the requirement form.

Start your Requirements >>>>

Remember, once you start the form, you won't be able to save your progress.

Please make sure you have all necessary info ready (see the CRF checklist)

Overview > Details > Categories > Compliance > Envelopes > Submit

<<< Back   Continue >>>

NB. Navigation
Once a page has been completed you can navigate back using the headers or the back button at the foot of the page.

Requirement key fields

Requirement key fields

1 Organsiation Name

- You must input an organisation name
- Organisations will filter based on a three letter search e.g 'Bar..'

Organisation Name

Bar

Barking and Dagenham College
Ladybarn Primary School
London Borough of Barnet
The Barnet Group

NB. An email address will be assigned to each organisation which will receive a copy of all CRFs raised

2 Requirement Owner

This is the person completing the form an who is ordinarily the contract manager for the project.

Client Requirement Owner

First Name

Surname

Email

Telephone

3 Approver Details

If your requirement needs budget approval you will need to include the approvers name and email address. Please check and make sure the email address has been entered correctly.

Approver Details

Please provide contact details for the approver. They will be sent the requirement for review before being accepted by Bloom.

First Name

Surname

Email

4 Statement of Requirements

You must attach the appropriate statement of requirements to be completed in advance of starting the CRF. If you need support completing, please contact your Customer Development Manager.

Attach your statement of requirements

Please download a copy of the Statement of Requirements template below. You should then complete all required fields, and the upload as required

File size limit: 10MB

Document No T3 - Service Specification Template Projects Exceeding 75k v3.0.docx

Choose file No file chosen

NB. If you need to upload more than one document it will need to be as a zip file.

Review & submit

Review & submit

1 Review submitted information

Before submission of your requirement you can review all of the completed fields on the Submit page.

You can navigate back and update a response by clicking the underlined section heading next to a question.

Overview > Details > Categories > Compliance > Envelopes > Submit

Test Project

Project Details

Section	Question	Answer
Overview	Which Directorate/Department does this requirement relate to?	Finance
Overview	Which Service within the Directorate/Department does this requirement relate to?	Payroll
Overview	Client First Name	Ben
Overview	Client Surname	Darrah
Overview	Client Email	ben.darrah@bloom.services

2 Submit

When you are happy with the content of the form, you can submit.

It will then ask you to confirm a second time.

Envelopes	What Evaluation Methodology do you want to use?	Price Only
Envelopes	Who do you want to evaluate the Technical Envelope?	Bloom

Submit Requirement to ben.darrah@bloom.services >>>

NB. If you have included an approver, their email address will be confirmed – please ensure it has been entered correctly.

The internal approval process

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The internal approval process

Option 1: No approval needed

No approval is required, and you have answered ‘No’ to the approver question.

Once the CRF has been submitted;

- The requirement owner will receive email confirmation including the CRF data and attachments.
- An email linked to the organisation e.g. procurement@buyer.co.uk will be copied into the requirement owner confirmation.
- Projects@Bloom.services will receive the CRF for processing and will be in touch.

1

Is internal approval of the requirement needed before starting the tender process?

- Yes
- No

NB. If you are not receiving emails to the organisation email please contact your CDM to get the contact address updated.

2

N

no-reply@bloom.services
To: You

Dear <Requestor Owner First Name> ,

Your request has been raised and sent to projects@bloom.services.

They will be in touch shortly to progress the project.

Many thanks,

Bloom Procurement Services Ltd

For assistance please contact Bloom:
Email: contactus@bloom.services
Telephone: 020 3948 9400

The internal approval process

Option 2: Approval needed

Step 1: Confirmation Email
If approval is required, once the CRF has been submitted;

- The requirement owner will receive email confirmation including the CRF data, attachments and their approver details.
- An email linked to organisation e.g. procurement@buyer.co.uk will be copied into the requirement owner confirmation.
- Projects@Bloom.services will receive confirmation that a request is in the process of approval

1

Dear <Request Owner First Name>,

Your CRF has been raised.

It is awaiting approval from:

Name: <Approver Name>
Email: <Approver Email >

Many thanks,

Bloom Procurement Services Ltd

Step 2: Approver Email
The approver will receive an email with the CRF data and attachments and will be asked to review and approve or reject.

They will be asked to email the response to the client requirement owner, copying in the projects@bloom.services and the linked organisation email.

2

Dear <Approver First Name>,

A new project has been raised that needs your approval.

Please review the information below and attached.

Send your approval decision to <client requirement owner email > copying in projects@bloom.services and <organisation assigned email>

If it is a rejection, please clearly state the reasons in your email.

Many thanks,

Bloom Procurement Services Ltd

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Step 3: Approval Decision
The approver will review the CRF data and will then respond via email with their decision.

Dear <Request Owner First Name>,

I have reviewed the project <Test 0001> and am happy to approve.

Many thanks,

If they accept;
The requirement owner will receive an email response. Bloom must be copied into the response and will then start processing the request. If they are not copied in, please forward to **projects@bloom.services**

Dear <Request Owner First Name>,

I have reviewed the project <Test 0001> and am rejecting on the basis of XXX

Many thanks,

If they reject;
The approver will need to respond via email to the requirement owner. The requirement owner will then need to review the response, update the CRF data on the email and send back to the approver for review.

Appendix: Customer requirement form checklist

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Areas to consider	Details required
Complete your service specification *Contact your Customer Development Manager if you need support*	Specification documents can be found on the CRF landing page: https://crf.bloom.services/ • What are your milestones? • Service Levels and KPIs? • Data Protection Schedule • Scoring Weightings (if Price & Quality)
Confirm the supplier details for a direct award or any preferred suppliers as part of a mini competition	Supplier Details • Supplier Name • Address • Phone number • Contact Name (If Direct Award)
Does your requirement need budget approval?	If yes, you will need budget approver details • First Name • Surname • Email
Do you have specific supplier shortlisting criteria?	Areas to consider... • The region(s) they are located • Their size • Technical Accreditations • Security Considerations • Security Clearance Levels • Industry Standards • Any DBS requirements

Areas to consider	Details required
What category does your project fall into? This is what we use to help source appropriate suppliers for your tender.	The full list can be found on the CRF landing page: https://crf.bloom.services/
What level of insurance cover do you need?	• Professional Indemnity • Public Liability • Employers Liability
Do you have any special considerations?	• IR35 Implications • Social Value • Any Special clauses • NDA for all suppliers who want to respond • NDA for the successful supplier • A Collateral Warranty
What is your commercial model?	• Is the contract based on milestones, day rate or time & materials • Will you accept expenses? If yes, how much? • Are you receiving any external funding and who from?
Who will be evaluating your supplier responses? Contacts will receive a copy of the evaluation template after the submission deadline.	If not Bloom, you will need to provide contact details for those evaluating Commercial and Technical envelopes.