



Service Definition

Investment Platform Selection, Assurance & Procurement Support

1. Service overview

This service supports public sector bodies, non-departmental public bodies, charities and not-for-profit organisations including LGPS pools selecting, assuring and procuring investment platforms and associated technology services with a focus on operational resilience, transparency, Value for Money and sustainable service outcomes.

Strata provides independent, platform-agnostic support across investment platform selection, procurement readiness and assurance activities. The service helps organisations make informed, transparent and auditable decisions when selecting enterprise and private market investment platforms and delivery partners.

The service is suitable for organisations undertaking new platform selection, replacement of existing systems, procurement exercises or independent assurance of platform-related decisions where secure delivery, strong governance and effective oversight are required.

2. Scope of the service

This service may include the following activities:

- Business case creation and support to stakeholders
- Investment platform selection and sourcing support
- Support for procurement documentation, including framework advice/options, evaluation criteria and bidder clarification processes.
- Vendor evaluation against functional, data and delivery requirements
- Market and capability assessments for investment platforms
- Independent assurance of platform selection and procurement processes
- Governance frameworks for transparent platform selection decisions
- Access to specialist inputs alongside partner organisations

Services may be delivered as standalone assurance engagements or as part of wider procurement or transformation programmes.

3. What is not included

This service does not include:

- Acting as a procurement authority or contracting body
- Software licensing or resale of third-party platforms
- Vendor-led solution design or product recommendation mandates
- Legal, tax or regulatory advisory services
- Implementation delivery unless separately contracted





4. Service delivery approach

Delivery is aligned to public sector procurement, governance and assurance requirements.

Engagements are structured to support objective evaluation, risk management and defensible decision-making.

Delivery is informed by Strata's ongoing engagement with industry platforms, vendors and regulatory developments, enabling practical insight into emerging capabilities and evolving best practice to be reflected in delivery decisions where relevant.

Our delivery approach aligns with established public sector digital and service design principles, emphasising user-centricity, iterative learning and governance maturity consistent with Government Digital Service (GDS) service manual expectations where relevant.

Strata works alongside client procurement, legal and technology teams, providing independent analysis, structured assessments and assurance support throughout the selection and procurement lifecycle, including pre-market engagement where appropriate.

5. Service levels and support

Support is provided through agreed advisory engagement models, with named leads responsible for coordination, assurance and stakeholder engagement.

Reporting, governance and escalation arrangements are agreed at mobilisation and aligned to client procurement frameworks.

6. Onboarding and offboarding

Onboarding includes confirmation of scope, procurement context, evaluation criteria and governance arrangements.

Offboarding includes handover of assessments, recommendations, assurance outputs and closure reporting aligned to client requirements.

7. Data protection and security

Strata operates in line with UK data protection legislation and client security requirements. Access to procurement documentation and sensitive information is restricted to authorised personnel and governed by defined access controls.





8. Dependencies and client responsibilities

Clients are responsible for:

- Defining procurement objectives and evaluation criteria
- Providing access to relevant documentation and stakeholders
- Making timely procurement and selection decisions
- Managing contractual engagement with vendors

9. Service constraints

This service provides selection, assurance and procurement support only.

Strata does not act as the contracting authority or assume responsibility for procurement outcomes.

10. Exit management

At service completion, Strata supports a managed and controlled exit including:

- Handover of evaluation outputs and assurance documentation
- Knowledge transfer to client or third-party teams
- Support for transition into implementation or delivery phases.

