

RESEARCH & EVALUATION SPECIFICATION

**Best Practice/Continuous Improvement
Programme for
the National Careers Service**

September 2018

CROWN COMMERCIAL SERVICE RESEARCH FRAMEWORK AGREEMENT

Invitation to Tender

Building on, promoting and Delivering continuous improvement approaches and resources for the National Careers Services

You are invited to tender to carry out the Best Practice programme on behalf of the National Careers Service as specified in this document.

You should note that:

- This project is tendered through the Crown Commercial Service Research Framework **RM6018** Agreement (Education (Higher), Process Evaluation, Systematic Review, and General Selection) on behalf of the Education and Skills Funding Agency (ESFA)
- The ITT does not imply a commitment to contract
- We reserve the right not to award an Assignment Contract as a result of this ITT
- No Assignment Contract shall be formed until the selection contractor receives a Commissioning letter signed by a duly authorised representative of the Customer
- If you choose to tender then you are required to bear all the costs incurred by you in the preparation of that tender

All information supplied in the specification should be treated as confidential and disseminated only on a “need to know” basis.

Enquiries about this invitation to tender should be made using the messaging facility on the e-tendering portal.

The Education and Skills Funding Agency

The Education and Skills Funding Agency (ESFA), launched on 1 April 2017, brings together the existing responsibilities of the Education Funding Agency (EFA) and Skills Funding Agency (SFA), to create a single funding agency accountable for funding education and training for children, young people and adults. The ESFA is an Executive Agency of the Department for Education (DfE).

The ESFA is accountable for £61bn of funding for the education and training sector, providing assurance that public funds are properly spent, achieve value for money for the taxpayer and deliver the policies and priorities set by the Secretary of State.

The ESFA regulates academies, FE Colleges and training providers, intervening where there is risk of failure or where there is evidence of mismanagement of public funds, and delivers major projects and operates key services in the education sector, such as school capital programmes, the National Careers Services and the National Apprenticeship Service.

The ESFA works closely with Policy colleagues in the DfE, particularly the infrastructure and Funding Directorate on schools and the Tertiary Education Directorate on young people, adults, apprenticeships and skills.

We also:

- maintain Individual Learner Record (ILR) data
- publish data and datasets to support planning and performance reporting in FE
- support the Learning Records Service, who maintain Unique Learner Numbers (ULNs) and Personal Learning Records (PLRs)

Background

The National Careers Service

The National Careers Service sits at the heart of the Careers Strategy (2017) and reflects the ambitions of the Industrial Strategy. There is a clear focus on improving social mobility through co-ordination activity and effective working between the National Careers Service and a range of partners including the Careers and Enterprise Company, Combined Authorities, employers, Local Enterprise Partnerships (LEPs) and schools and colleges.

The Area Based National Careers Service was launched in April 2012 and alongside apprenticeships, traineeships, 24 plus advanced learning loans and a range of other initiatives represents an important strand in the Government's ambition to:

- Grow an internationally competitive skills base
- Create sustainable jobs and foster progression to support economic growth
- Create a dynamic and efficient skills system with informed learners and ownership by employers, supported by high quality, impartial careers advice
- Prioritise help to apprentices, young adults, low-skilled other groups that need skills support if they are to make a vital contribution to society

It is within the context of quality assurance and continuous improvement that the Agency's National Careers Service Team has designed and implemented a comprehensive quality programme for the National Careers Service. The continuous improvement programme drives improvements across the service by analysing customer experience, identifying and systematically

sharing best practice and regularly assessing the performance, quality and impact of the frontline staff who deliver the service.

The Education and Skills Funding Agency, which manages the National Careers Service, is committed to helping people realise their potential and get the skills they need to get on in life and work, supported by high quality, impartial careers advice. The Agency is also responsible to actively help towards the Government target of 3 million apprenticeship starts by 2020.

The Service is currently managed by 7 prime contractors covering 12 geographical areas, and monitored by the Education and Skills Funding Agency. The National Careers Service telephone helpline for adults and young people is delivered across England by one contractor.

The redesigned National Careers Service, which will commence on 1 October 2018, will operate across 9 redrawn regional areas. It will deliver an impartial information, advice and guidance offer to all customers together with a greater focus on digital tools and enhanced support to customers facing particularly barriers and challenges.

The National Careers Service provides high quality information and impartial, professional careers advice and guidance to those who need it, it is available across England to any young person (aged 13 years old and over) or adult. The service is delivered under one consistent national brand but is shaped locally to respond to the needs of local partners and employers.

The service is delivered via three channels; customers can speak to an adviser, either on the telephone or face-to-face and they can access the National Careers Service online (where there is also the facility to email an adviser). The three channels operate as a single integrated service where customers can be referred/ signposted between them to provide the support that best suits their needs. Approximately 1,300 advisers deliver the service across the telephone, face-to-face and web channels to around one million customers each year.

The National Careers Service helps people to think flexibly about the skills that may be needed in the future, including helping them make realistic plans and choices to realise their potential in an ever changing economy. The service plays a direct and active role in connecting local people to local opportunities, working in close partnership with local business and educational institutions.

The vision is for millions of individuals to enjoy more rewarding working lives, and to create a culture where career development and acquiring new skills is the norm. In hard economic terms the service is funded to ensure that citizens have the skills and careers advice they require to progress in learning and work and therefore contribute to the economic growth of the country.

The Education and Skills Funding Agency published an invitation to tender (ITT) in February 2018 to procure a new area based National Careers Service from 1 October 2018. Contracts for the current service will end on 30 September 2018.

The future service chimes strongly with the Careers Strategy's focus on the timely delivery of high quality careers information and advice to help people negotiate the learning, training and employment opportunities that will feature throughout their working lives.

The National Careers Service is a major partner in helping the Careers Strategy to deliver its commitment to ensure that everyone has the appropriate advice and guidance to move into the education, training or employment opportunities that matches their skills, interests and aspirations.

The National Careers Service will play a lead role in fundamentally changing how people are inspired to make better, informed career choices, lift their aspirations and make learning choices that reflect future aspirations.

The overarching ambition for the National Careers Service is to support increased social mobility, productivity and earning power for thousands of customers who need help to navigate the learning, employment and skills landscape. Regardless of background and circumstances the National Careers Service ensures that customers are;

- Informed and aware of the wide range of learning and work opportunities that are available to them;
- Better able to independently manage their careers, identify opportunities and respond to challenges in the employment and training market;
- Are aware of and able to access accurate and up to date information about careers and learning from the National Careers Service whenever they need it; and
- Are guided and supported to use a range of high quality digital tools that will enable them to further develop their career management skills and progress in learning and work.

The National Careers Service plays a critical role in empowering and engaging unemployed adults and adults at a distance from the labour market. It supports individuals in transition to and within the labour market, and helps them to make effective use of their skills and be resilient in the face of change. The evidence suggests that career guidance is effective in re-engaging unemployed people in work.

From 1 October 2018 the National Careers Service will place particular emphasis on the following:

- a. Customer focus – a greater reliance on user research and empirical data about customer needs and experiences to drive continuous improvement;
- b. Digital First – the development of intuitive, customer friendly digital tools that enable customers to navigate a greater part of their journey into learning and work independently;
- c. Analytics – more intelligent and precise use of data to drive improvements and make the service more responsive;
- d. Enabling partnerships – the National Careers Service will continue to play a key enabling, facilitating and engagement role in the employment and skills market; and
- e. Research and evaluation – the ESFA will continue to commission independent research and evaluation to ensure the quality, impact and effectiveness of the service is maintained and built on.

Revised National Careers Service customer priority groups from 1 October 2018

Primary Customers are adults living or working in England, aged 19 or over (or aged 18 for those who are not in education employment or training) with a focus on the following Priority Group Customers.

- i. 18-24 year olds not in education, employment or training (NEETs);
- ii. Low-skilled adults without a level 2 qualification;
- iii. Adults who have been unemployed for more than 12 months;
- iv. Single parents with at least one dependent child living in the same household.
- v. Adults and special educational needs and/or disabilities; and
- vi. Adults aged 50 years and over who are unemployed or at demonstrable risk of unemployment.

Without exception, all young people, that is customers aged 13-18 years, are able to access comprehensive careers information, advice and guidance via telephone or web chat.

Secondary Customers are people who support the above primary customers. These consist of intermediaries such as teachers, parents, customer advocates, Jobcentre Plus work coaches and others.

The importance of quality

The Education and Skills Funding Agency is committed to ensuring that its investment in the National Careers Service is realised through customers accessing high quality careers information and advice from professional, highly skilled, careers advisers.

The Agency is committed to driving up the quality of the National Careers Service. The standard contract management and quality assurance processes ensures that sound arrangements are in place to deliver a good service. This is complemented by ongoing research into customer satisfaction and progression.

Prime Contractors must ensure that they (and their subcontractors) meet the minimum quality requirements for the delivery of impartial careers information, advice and guidance as part of the core offer of the National Careers Service. These are;

- a. Holding and retaining the matrix Standard. 100% of organisations delivering the Area Based Service to be accredited to the matrix Standard within six months of the start of the Contract.
- b. Being subject to and complying with the Ofsted Common Inspection Framework for Further Education and Skills;
- c. Compliance and full participation with any ESFA initiatives, research or programmes to assess, measure and improve the quality of the National Careers Service; and

The focus on quality is further underlined by the fact that all National Careers Service Prime Contractors participated in a round of Ofsted inspections that concluded in Spring 2017. All National Careers Service Prime Contractors were rated good and two were rated outstanding.

It is within this context of quality assurance and inspection activity that the Agency introduced a programme of activity and research that will support continuous quality improvement across the National Careers Service by identifying and building on local, national and international leading edge best practice from across the careers information, advice and information sector.

The National Careers Service Best Practice Programme/Continuous Improvement Programme is made up of a range of activities and interventions that aim to raise the overall consistency and quality of the National Careers Service offer. The effectiveness of the programme will be measured in terms of improvements in customer experience, customer satisfaction and improved progression into learning and work. The programme will include but not be restricted to the following elements: -

- Dialogue with prime contractors to build on identified best practice and good practice which is scalable and transferrable across the Prime Contractor network
- Design and development of content to support and enhance **Coach**, the National Careers Service's online learning resource.
- A stronger emphasis on, not only recording, but on driving and helping to embed best practice/continuous improvement across the National Careers Service network.

Aims and objectives of the Project

The aim of the Best Practice Programme is to provide coherent and useful answers to the following questions:

What examples of effective, innovative and outstanding practices are National careers Service prime contractors employing to deliver the service, and how can we share these with other prime contractors?

What specific and systemic challenges and issues are at play in the way the National Careers Service is delivered by prime contractors, and how can we identify, mitigate and ultimately eliminate these blockers to effective delivery?

The purpose of the best practice programme is to support the development of a distinctive and identifiable single National Careers Service culture of continuous improvement, innovation and sharing of best practice across the Prime and subcontractor network.

The aims and objectives of the programme will only be achieved by effective collaboration and partnership working between the Agency, the contractor and a range of key stakeholders.

Aims

The overall aim of the Best Practice Programme is to enable the Education and Skills Funding Agency to make a significant and ongoing contribution to the following broader aims of the National Careers Service:

- Promote a 'learning organisation' culture across the National Careers Service network
- Contribute to improvement in satisfaction and progression ratings and positive outcomes for National Careers Service customers
- Raise the standard and quality of customer service across a number of key operational areas.

- Support National Careers Service prime contractors who are committed to moving their management and delivery of the service from good to outstanding
- Evidence and measure improvements in the National Careers Service as a result of the Best Practice Programme/Continuous Improvement Programme.
- Building on identified, scalable and transferrable Best Practice

Objectives/key themes

To help the Agency to pursue the above aims through the Best Practice/Continuous Improvement programme by achieving the following specific objectives:

- Build on baselined current best practice and develop an index or measure that can quantify progress as a result of this programme
- share identified best practice, via accessible formats, local (internal and external), national and international leading edge best practice from across the careers information, advice and information sector, and any other related sectors
- Build on evidence of collaboration and sharing of good practice by Primes operating across multiple areas
- Develop and recommend strategies to encourage and support the practical take up and implementation of new ideas, resources and information by the National Careers Service prime and subcontractor networks
- Produce and share resources (via paper, online and through a series of national workshops) that encourage innovation and supports improvement across the National Careers Service network
- Extend the usage, variety and influence of **Coach** on how the National Careers Service staff learn, work and communicate
- Develop a better understanding of the black box approaches used by prime contractors
- Greater integration and collaboration between the three independent research projects (Best Practice, Mystery shopping and customer satisfaction and progression) including working together in a way that involves sharing information and support to avoid duplication and utilise synergies
- Production of infographics that illustrate and explain best practice interventions and strategies in the National Careers Service
- Build on intelligence and recommendations from the 2016-17 cycle of National Careers Service Ofsted inspections
- Examination of prime contractor views and usage of redesigned National Careers Service website and use of digital and social media in delivering the service
- Engagement with the Apprenticeships agenda generally; and specifically via the Apprenticeships Support Fund initiative and through

work with the apprenticeships enhanced support team (new name: ASIST – *Apprenticeships Specialist Intervention and Support Team*)

- Engagement with T Levels agenda generally
- Sub-contractor management and quality – how are Prime Contractors ensuring subcontractors are consistent with their offer and the quality is good across sub-contractors? How are they addressing variations in performance and delivery?
- What makes a high performing Adviser? What is the criteria for an effective practitioner?
- Examples of excellent Best Practice which can inform and develop the service and help with Ofsted, business development and growth
- Report improvements capturing transferrable strategies for embedding across the network
- Support developing areas of work such as failure to attend (FTA) problems. Would an appointment booking service for customers impact FTA.
- Support developing areas of work such as digital pilots to enhance the National Careers Service website.
- Flexibility to support development of digital website and social media strategy
- Undertake the updating and refreshing of the customer charter

The Agency's vision is to further develop and deliver an enabling service that advises, informs and empowers customers to develop the resources and resilience to manage and make informed decisions about their own careers and learning. This will be achieved by ensuring that all National Careers Service frontline and support staff achieve a robust level of awareness, knowledge and competence in the areas of identifying customer needs, using LMI effectively, building customer motivation and working effectively with employers and other stakeholders.

Methodology

The programme will be led by the Agency. The project will be delivered via a range of practitioner-led face to face and online activities, resources and events that encourage outcome-focused thinking and creative approaches to helping customers progress in learning and work.

- The contractor will continue to lead and deliver a research exercise to define, identify, codify and produce a narrative report about best practice from across the National Careers Service Prime Contractor and subcontractor network. The research will include a 'baseline' or measure of the level of innovation amongst Prime Contractors. The research will draw on evidence from meetings with Prime Contractors,

stakeholders and customers; observation, reviews of performance data, satisfaction progression surveys, Ofsted reports and matrix assessments, as well as one to one discussions with National Careers Service managers. The Agency will share any relevant existing research and performance data that it possesses to support the process.

- The themes mentioned in this specification are not exhaustive and should not stop the contractor from identifying additional points of interest.
- The findings must be available as a narrative report, a summary document, a PowerPoint presentation or infographic, as required. The style and language of the report must be accessible to a non-IAG audience.
- The contractor must have sufficient capacity and resources to be involved in the design, direction and delivery of the individual projects that contribute to the Best Practice Programme. The contractor should expect to attend at least six face to face meetings in Coventry and a similar number of teleconferences during the life of the project.
- The contractor will be responsible for making the content of workshops available as online resources that will be available to National Careers Service advisers and managers through **Coach** and similar digital platforms.

The above topic areas are not exhaustive and may be subject to change. It will be acceptable for the contractor to subcontract elements of the workshop programme.

Please set out, with estimated costs, the activities, training, resources, research, communications and evaluations you would undertake in during the contract extension period of the Best Practice Programme to support the Agency in achieving the following aims and objectives for the National Careers Service:

1. Embed learning and best practice across the National Careers Service network.
2. Provide details and examples of how your organisation would contribute to the development of a cycle of innovation and continuous improvement across the service.
3. Provide details and examples of how your organisation would contribute to the development of strategies or approaches that would lead to measurable improvements in satisfaction and progression outcomes for customers.

4. Clearly set out your strategies and the resources you would develop to support prime contractors and subcontractors in their efforts to raise the skill sets, qualifications and effectiveness of their advisers.

5. Set out the steps your organisation will take to help National Careers Service prime contractors raise their Ofsted grade from good (grade 2) to outstanding (Grade 1).

Project Management Arrangements

A Project Manager will be allocated for this project. Full details will be given following contract award.

Timescales

Please confirm that you can meet our deliverables based on the timescales indicated with clear milestones.

| Activity | Date |
|---|-----------------------|
| Tender Launch date: | 13 September 2018 |
| Last date for supplier queries via Bravo portal | 12.00 03 October 2018 |
| Last date to submit tender | 12.00 05 October 2018 |
| Tender evaluation completed | November 2018 |
| Successful organisation notified | November 2018 |
| Contract handover (if required) | December 2018 |
| Contract start date | January 2019 |

Deliverables

We require the following deliverables:

- Project inception and scoping meeting December 2018.
- Monthly written progress reports and updates by phone as required.
- Analysis and drafting of best practice/continuous improvement research reports, case studies, resources as appropriate
- Delivery of an agreed selection of objectives/key themes from above

- Receipt of best practice reports, resources, presentations and/or workshops related to the selected objectives and key themes
- Adapt findings and insights from literature reviews, best practice research, Ofsted findings and other sources into accessible recommendations, practical strategies, guidance and approaches that can be delivered
- Support the planning and delivery of National Careers Service events that showcase the work of the Best Practice Programme
- Make the content of events or free standing workshops available as accessible, high quality, online resources that will be available to National Careers Service advisers and managers through the National Careers Service Resource Portal (**COACH**) and CPD Resource Bank.
- Review and support (**COACH**) the National Careers Service online learning portal by producing appropriate content for the platform as directed, and by working closely with the IT supplier responsible for building, hosting and maintaining **COACH** as required.
- Contribute to review and evaluation of the National Careers Service in collaboration with ESFA and DfE staff and other research agencies engaged in research and evaluation activity related to the National Careers Service.

Special Terms

There are no special terms for this Assignment.

To the Contractor:

Project Completion Date

March 31 2021 (subject to review each fiscal year).

NB The Agency reserves the option to extend the contract and retain the services of the successful contractor for a further two years i.e. 1+1 year extension subject to satisfactory performance by the contractor; the continuing availability of funding; and the continued commitment of the Education and Skills Funding Agency to the programme.

Meeting objectives

Outline what you would undertake to ensure the project objectives are met, highlighting key milestones and any value that can be added.

Methodology

- Give a detailed description of the methods to be used in undertaking the project, indicating the resources that will be utilised.

External Support needed

- Note the support that would be needed and from whom, in order to undertake and complete this project

Dissemination

- Provide details of how you would propose to work the Education and Skills Funding Agency to disseminate emerging and final findings to stimulate policy debate.

Timings (1 page maximum)

- Provide a detailed timetable for carrying out the work based on the proposed approach and method
- This should highlight key milestones and deadlines, including suggested meetings and progress reports.

Staff (2 pages maximum)

- Provide a list of the staff that will be involved in the project at all levels from director, project manager and all other levels involved. The list should briefly highlight relevant experience, their role in the project; their estimated time to be spent on the project and the length of time they have spent working with your organisation
- State the name of the project manager and a designated deputy

Finance (2 pages maximum)

- Where appropriate provide a clear structure of charges for the different questionnaire length or sample structure options
- Please note that unless the specification details a budget for the project, one will not be provided.
- Give a detailed list of fees and expenses valid throughout 2018/19. The fees should include the cost of all required outputs as set out in this ITT.
- We anticipate making payments by either of the following methods:
 - Staged payments e.g. 30% (on confirmation of appointment), 30% on the beginning of fieldwork and 40% once the final report is completed.
 - Any additional expenses should be applied to the first available invoice; there is scope for flexibility here, please indicate any requests.
 - Payment in arrears for effort expended as per a pre-agreed payment schedule

- Note that fees should also include the time and travel costs for three project meetings with the Education and Skills Funding Agency project manager. Kindly state the costs per meeting if additional meetings are required during the life of the project.
- The costs must include a full breakdown, i.e. include day rates for each member of staff, fieldwork costs (including cost per interview), project management costs etc

Tender Evaluation

The criteria to be used and their weightings are given below.

| | |
|---|----|
| Understanding the Environment Demonstrates understanding of the project environment, detailing experience and knowledge relevant to the project and policy/programme | 10 |
| Meeting the project objectives Outline how the project objectives will be met, highlighting key milestones and any value that can be added (10) Presentation of proposal – succinct, well written, meets all requirements and objectives (5) | 15 |
| Proposed Methodology Inclusion of a detailed project plan (10) Proposal gives a detailed description of the methods to be used in undertaking the project, indicating the resources that will be utilised and making it clear where the different methodology is suggested and why (10) Proposal demonstrates a proven track record with examples of relevant and similar projects delivered over the past 3 years. (5) | 25 |
| Staff and suitability of working arrangements Set out a resource plan identifying all staff and their intended involvement in the project (10) Outline qualifications, skills and experience of all staff involved including details of professional qualifications, membership of professional bodies and experience in similar projects over past 3 years. (7) Set out your customer liaison arrangements and procedures and ability to meet timescales (3) | 20 |
| Project Timescales Proposal includes detailed timetable for project, highlighting key milestones and deadlines, including suggested meetings and progress reports. (10) | 10 |

| | |
|--|----|
| <p>Costs and value for money</p> <p>Inclusion of full cost breakdown including daily rates for each team member and individual activity cost associated with the specification and within expected price range.(10)</p> <p>Provides examples of innovation in delivery methods to reduce costs and demonstrate value for money. (5)</p> <p>To include a cost estimate for any ad-hoc requests (5)</p> | 20 |
|--|----|

Given the nature of this project the ESFA may interview or require presentations from some or all tenderers before a contract is awarded. The ESFA's decision on the selection of the contractor shall be final.

If you have any questions relating to the requirements of the tender then please use the messaging service available on the Bravo portal in order to avoid delay. We will respond to your enquiry as quickly as possible during business hours. We reserve the right to tell other tenders your question (anonymised) and our answer.

Submission of Tenders

- Your tender must be submitted via the Bravo e-tendering portal at <https://education.bravosolution.co.uk> in Microsoft Word format (.doc) or Adobe Portable Document Format (.pdf). The maximum length should be 28,000 characters (including spaces and carriage returns) approx. 10 sides of A4 with a minimum font size of Arial 12.
- If you experience any technical difficulties with the portal then please contact the e-tendering help desk at help@bravosolution.co.uk.
- Queries relating to the specification or project should be submitted using the Bravo portal and not directly to the project manager.
- If you are unable to provide information in the form required then please contact us as soon as possible using the messaging service available on the Bravo portal.
- Full tenders must be received no later than 12.00 October 05 2018
- Late proposals will not be accepted.
- Your tender should be valid for sixty (60) days from the deadline for receipt of tenders.

Tender Evaluation

Tenders will be evaluated using a weighted scoring approach with minimum required scores for each of the technical criteria and a minimum score across all technical criteria. Information from your tenders to become party to the Framework Agreement or from your pre-qualification questionnaire responses may be taken into account in this evaluation. The criteria to be used and their weightings are given below.

| | Category 3 |
|---|-------------------|
| Understanding the environment | 10 |
| Meeting the project objectives | 15 |
| Method | 25 |
| Staff and suitability of working arrangements | 20 |
| Project timescales | 10 |
| Costs and value for money | 20 |

Given the nature of this project the Agency may interview or require presentations from some or all tenderers before a contract is awarded. The Agency's decision on the selection of the contractor shall be final.

We expect to notify you of the outcome of the tender evaluation by November 2018.