**ANNEX A**

**GRANT APPLICATION - INVITATION TO BID (ITB) / CALL FOR PROPOSALS**

**Department for Education (DfE)**

**INVITATION TO BID (ITB) for the Initial Teacher Training Scholarships Programme (ITT Scholarships).**

Your organisation along with others is invited to offer a bid for delivery of the ITT Scholarships Programme as outlined in the attached documents. Enclosed are:

* **Document 1: Instructions and Information on the Bidding Procedures**
* **Document 2: Specification for Providing the Initial Teacher Training Scholarships Programme**
* **Document 3: Evaluation Criteria**
  + **Document 3a – ITT Scholarships Cost Matrix Template**
* **Document 4 : Qualification Questionnaire and Declaration**

Please read the instructions on the bidding procedures carefully. Failure to comply with them may invalidate your bid, which must be returned by the date and time given below.

Your bid must be emailed to [itt.scholarships@education.gov.uk](mailto:itt.scholarships@education.gov.uk) no later than **midnight on 11 June 2018.** Bids must be marked “Bid - for the ITT Scholarships Programme” in the subject field. Please also indicate which scholarship the bid is for (maths, physics, chemistry, computing, MFL or geography). Late bids will **not** be considered.

Contact should **not** be made with any member of the department other than via [enquiries.scholarships@education.gov.uk](mailto:enquiries.scholarships@education.gov.uk) regarding this Invitation to Bid (ITB), as this may invalidate your application.

If, having read the enclosed requirement, you decide not to submit a bid, please send your reasons (though you are under no obligation to do so) to [itt.scholarships@education.gov.uk](mailto:itt.scholarships@education.gov.uk) marked **“No Bid”** in the subject field.

The enclosed **Document 1** contains further information and clarification of the department’s requirement.

**DOCUMENT 1**

**INSTRUCTIONS AND INFORMATION ON BIDDING PROCEDURES**

1. These instructions are designed to ensure that all bids are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified.
2. Please contact [enquiries.scholarships@education.gov.uk](mailto:enquiries.scholarships@education.gov.uk) if you have any doubts as to what is required or if you have difficulty in providing the information requested. Pre-bid negotiations are **not** allowed.
3. Please raise any queries you may have via the above mailbox address prior to submitting your bid application. We will attempt to respond to all queries within 2 working days and will publish a Q&A log of all queries raised at intervals throughout the bidding period. The deadline for receipt of clarification questions is **midnight on 25 May 2018*.***
4. Please note that references to the 'department' throughout these documents mean The Secretary of State for Education acting through his representatives in the Department for Education.

**Grant Period**

1. We will provide the successful organisation with the final version of the DfE grant funding agreement. This agreement will set out our expectations of the successful applicant, including the grant funding terms and conditions ([link](https://www.gov.uk/government/publications/grant-funding-agreement-terms-and-conditions)). The successful applicant will be required to accept the final version in full.
2. A grant funding agreement with the successful organisation will be finalised in **August 2018**, with the intention of issuing a final grant funding agreement by **September 2018**. The grant funding is for three years and the department will have the option to review and/or break the agreement after each year.
3. The department has established the following indicative timetable.

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| **Milestone** | **Key Dates** |
| Issue of Invitation to Bid (ITB) | 14 May 2018 |
| Deadline for submission of clarification questions via [enquiries.scholarships@education.gov.uk](mailto:enquiries.scholarships@education.gov.uk) | 25 May 2018 |
| Deadline for receipt of bids via [itt.scholarships@education.gov.uk](mailto:itt.scholarships@education.gov.uk) | 11 June 2018 |
| Evaluation and Clarifications of Bidders’ Proposals | Before 31 July 2018 |
| Notify bidders of decision outcome | Early August 2018 |
| Anticipated Issue of Grant Agreement Award | Mid to late August 2018 |
| Grant Commencement | 1 October 2018 |

1. Whilst the department will make every effort to keep to the above timetable, no guarantees are given.
2. We will endeavour to communicate any changes to above dates to all bidders via email.

**Incomplete Bid**

1. Bids may be rejected if the information asked for in the ITB and Specification is not given at the time of bidding.

**Returning Bids**

1. Bids must be emailed to [itt.scholarships@education.gov.uk](mailto:itt.scholarships@education.gov.uk) no later than **midnight on 11June 2018.** Bids must be marked “Bid - for the ITT Scholarships Programme” in the subject field. Please also indicate which scholarship the bid is for (**maths, physics, chemistry, computing, MFL or geography**). Late bids will **not** be considered.

**Multiple Bids**

1. If your organisation is interested in bidding for more than one subject scholarship programme, you **must** submit separate bid for each. Bids for multiple scholarships programmes will not be considered.

**Receipt of Bids**

1. Bids will be received up to the time and date stated. Those received before the due date will be retained unopened until the deadline. It is the responsibility of the bidder to ensure that their bid is delivered no later than the appointed time.

**Acceptance of Bids**

1. Your bid is not an agreement or grant. Meeting the selection criteria does not guarantee funding. Funding is limited and applications will be assessed and prioritised according to the extent to which they meet the selection criteria. Only high quality applications are likely to be considered for funding.
2. The department reserves the right to apply its discretion to the amount of funding that is to be awarded to the successful applicant. This may be in full accordance with the applicant’s proposal. However, if the department deems that only part of the proposal is acceptable, in terms of the stated deliverables, then it reserves the right to award funding on that basis.

**Inducements**

1. Offering an inducement of any kind in relation to obtaining this or any other grant with the department will disqualify your bid from being considered and may constitute a criminal offence.

**Costs and Expenses**

1. You will not be entitled to claim from the department any costs or expenses, which you may incur in preparing your bid whether or not, your bid is successful

**Feedback**

1. Following the award of grants, feedback will be available to unsuccessful bidders on request.

**Freedom of Information**

1. The department is committed to open government and to meeting its responsibilities under the Freedom of Information Act 2000. Accordingly, all information submitted to the department may need to be disclosed in response to a request under the Act. If you consider that any of the information included in your proposal is commercially sensitive, please identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time-period applicable to that sensitivity.
2. You should be aware that, even where you have indicated that information is commercially sensitive, we may still be required to disclose it under the Act if a request is received. Please also note that the receipt of any material marked ‘confidential’ or equivalent by the department should not be taken to mean that we accept any duty of confidence by virtue of that marking. If a request is received, we may also be required to disclose details of unsuccessful proposals.

**State Aid**

1. All bids must adhere to State Aid rules. State Aid is a European law term that refers to forms of financial support from a public body or publicly funded body, given to organisations engaged in economic activity on a selective basis, which has the potential to distort competition and affect trade between member states of the European Union. Unauthorised State Aid is unlawful aid and if public authorities award State Aid in breach of the rules, the European Commission has the power to require repayment with interest from the aid beneficiary. State Aid may be permitted if it falls under a certain threshold. This is known as de minimis aid. Currently the total de minimis aid granted to any one organisation must not exceed €200,000 over any period of three financial years.
2. Therefore, if you have received State Aid from any public body in the previous three financial years you must let us know on the application form. If your organisation has received State Aid in the previous three financial years below the de minimis threshold, this may well limit the amount for which you are eligible.

**Government Efficiency Spending Controls: Marketing and Advertising**

1. As part of the government’s commitment to efficiency controls, bidders should be aware that there are restrictions on what grant funding can be used for in relation to all paid-for communications and marketing activities. The controls apply to most communications activity including printing and publications, events, PR and digital communications activity. Exemptions may be granted for essential activities where cost effectiveness can be evidenced and where other no cost or low cost options have been exhausted.
2. Exemptions for expenditure under £100k can be approved by the department (through the Director of Communications) where proposed communications related activity is judged to be critical to the delivery of the project and meeting agreed national priorities for the government.
3. We do not envisage that projects will bid for expenditure over £100k on communications and marketing related activities, but if requested these would need exemption clearances from within the department and Cabinet Office in line with the government’s Marketing and Advertising Efficiency Controls. Therefore, organisations whose proposals fall into this category may need to provide further information, which might result in a delay in clearing funding.

**Qualification Questionnaire**

1. The department reserves the right not to proceed with further evaluation of any bid that fails to meet the requirements detailed in the Qualification Questionnaire, **Document 4**.

**Evaluation Criteria**

1. Your response to the bid specification will be evaluated using the criteria set out in **Document 3**.

**Bid Period**

1. Due to the intensive evaluation process, the department requires bids to remain valid until a final decision is made and the grant funding is awarded.

**Basis of the Grant**

1. The specification in **Document 2**, and the Financial Agreement, together with any special requirements, will form the basis of the Agreement between the successful bidder and the Secretary of State for Education.

**Format of Bids**

1. Bids must follow this format:

**Section 1** Table of Contents

**Section 2** Meeting the Specification (see Documents 2 and 3)

**Section 3** Qualification Questionnaire and Declaration (see Document 4)

**Section 4** ITT Scholarships Cost Matrix

**Length of Bid**

1. We will accept bids in A4 PDF format, which are no longer than a total of 20 pages in length (excluding Section 3 and Section 4). Any additional, supplementary information will not be accepted.
2. **Section 2 of your bid MUST be clearly separated into sections that correspond with the Requirements A-F, set out in Document 3.**

**Conclusion**

1. Whilst every endeavour has been made to give bidders an accurate description of the department's requirements, bidders should make their own assessment about the methods and resources needed to meet those requirements.
2. Bidders are also reminded that it is their responsibility to seek clarification on any aspect of the requirements or process that is not clear or requires further clarification, and in submitting a bid acknowledge that adequate information has been provided to enable a complete bid to be submitted.

**DOCUMENT 2**

**SPECIFICATION**

**Background**

1. The Department for Education (DfE) is responsible for children's services and education, including higher and further education policy, apprenticeships and wider skills in England.
2. Teaching remains an attractive and rewarding career; teacher numbers are at an all-time high, with over 457,000 Full Time Equivalent (FTE) teachers in state-funded schools throughout England (15,500 more than 2010). We recognise, however, that the strengthening labour market and growth in pupil numbers have made the situation more challenging and teacher recruitment remains a top priority for the department, particularly in priority subjects.
3. Introduced in 2012, Initial Teacher Training Scholarships is one of the initiatives developed to boost teacher recruitment in priority subjects. The programme recruits high calibre trainees in these subjects and provides them with bespoke, subject specific support during their Initial Teacher Training (ITT) year.
4. Scholarships are awarded to the most gifted trainees in physics, maths, chemistry, computing, modern foreign languages or geography. Aimed at high quality subject experts, who might not have otherwise considered teaching as a viable career option, scholars have the potential to bring world class subject expertise into the classroom, and have a rewarding career in teaching whilst contributing to raising the status of the profession.
5. Scholarship schemes are subject specific and delivered on a national basis. Delivery partners work with the department to promote and advertise the programmes, attract and assess candidates, and deliver bespoke subject specific candidate support to enhance their knowledge and expertise, which can then be applied and promoted in teaching. Figure 1 below details the current scholarship by subject and the current associated professional body.

|  |  |
| --- | --- |
| **Scholarship Subject** | **Professional Body** |
| Physics | Institute of Physics (IoP) |
| Chemistry | Royal Society of Chemistry (RSC) |
| Maths | Institute of Mathematics and its applications (IMA) |
| Computing | The British Computing Society (BCS) |
| Geography | Royal Geographical Society (RGS) |
| Modern Foreign Languages  (MFL) | British Council (BC) |

***Figure 1. Scholarships and professional bodies***

1. To apply for a prestigious scholarship, candidates need to have secured a training place on an **eligible** initial teacher training course in England for September of the academic year (i.e. 2018). Additionally, candidates must have a subject related degree with a proven or predicted grade of at least 2:1 or a recognised equivalent (a 2:2 may also be considered if they can demonstrate significant subject related professional experience).
2. Currently, scholars can receive up to £28,000 (£32,000 for maths on a phased basis) and the scholarship is awarded in place of a bursary. This offer may change year on year and the scholarship bursary will be provided to the applicants through the normal bursary mechanisms. Providers will not be involved in this process.
3. The department is looking for exceptional organisations to support the delivery of the scholarship programme for three years from academic year 2018-19; and in particular in areas that complement scholar’s initial teacher training; contribute to their subject expertise to benefit pupils and schools; shape the early career development of a subject expert teacher; and support teacher retention in the profession.

**Requirement**

Strategic objectives

* Improve the quality of the teaching workforce by attracting applicants who have a strong academic record, an excellent understanding of their subject and an ability to explain it to pupils, who are committed to teaching and who have the personal attributes to make them a good classroom teacher.
* Raise the status of the teaching profession.
* Increase teacher supply by attracting high-quality applicants who might not otherwise have considered teaching as a viable career option.
* Attract as many high-quality applicants as possible through a targeted marketing campaign, and encourage these applicants to progress to ITT whether they are awarded a scholarship or not.
* Establish communities of scholars who will continue to have a positive impact inside and outside of education as their careers progress.
* Share best practice and pool resources with the other subject associations involved in ITT scholarships in order to utilise economies of scale and improve recruitment.
* Forge links between scholarship programme participants and the wider subject professional community (e.g. the wider professional mathematical community).
* Maximise retention across the scholarships cohort through support and continuing links with the wider community of subject professionals for scholarship alumni.

Scope

1. The geographical coverage of the scholarships programme is for England only (Teacher supply is devolved to Wales, Scotland and NI). Scholarships run for one s alongside ITT. Historically, grant agreements were agreed annually on a one-year basis. From October 2018, the grant period is three years (delivering to three cohorts) and the department reserves the right to review continuation of funding the end of each academic year.
2. A total of 865 scholarships were awarded across all six scholarship programmes in the academic year 2016-17 (latest complete data available).
3. Our existing delivery model has a different partner providing a scholarship programme for each priority subject. This is based on our expectation of in-depth subject expertise and access to resources including memberships and links to wider professional bodies and subject specific professional networks.
4. Our intention is for this model to continue. Each of the six subject scholarships will be delivered under a separate grant agreement.
5. We envisage awarding six grant agreements of between c£150k and £200k per annum (inclusive of VAT). Grants will be in place from autumn 2018 to support:

* Delivery of the six scholarship programmes for the academic years of 2018-19, 2019-20, 2020-21; and
* Recruitment activity for the same period to enrol scholars for the academic years of 2019-20, 2020-21 and 2021-22.

1. The department will retain the option to review and/or break the agreement after each year.
2. If you think your organisation is well placed to deliver scholarships in more than one subject, we require a separate bid to be submitted for each subject scholarship. **We will not accept individual bids that propose delivery of multiple scholarships.**

1. We expect that bids will be aligned to, and/or involve, a royal chartered professional body, or professional organisation with similar standing, specialising in: physics, maths, chemistry, computing, modern foreign languages or geography.

Functions

Design a bespoke subject specific support package

1. Work with the department to design an individual subject specific scholarship scheme that will complement initial teacher training and draw on subject expertise and connections within their own and wider organisations. The programme will shape the early career development of a subject expert teacher to the benefit of schools and pupils.
2. This will include providing a variety of subject specific workshops, coaching and CPD support, and developing materials to enhance teaching ability and increase subject knowledge.

Attract candidates to scholarship programme

1. Produce and implement a high quality and rigorous application and assessment process to recruit the most gifted and talented teacher trainees to become subject expert teachers. This will include attending recruitment fairs, advertising the subject scholarship, assessing candidate applications for eligibility and suitability for a scholarship.
2. This will also include developing a communications strategy to attract interest, provide information to potential scholars about the scheme, how it works, the impact it can have, how to take forward their interest and how to apply.

Transition arrangements and continuity

1. Grant recipients will be expected to deliver scholarship support to candidates who were successful during the 2018 assessment rounds. This will require you to deliver at pace in order ensure continuity with the existing programme and to understand the needs of the cohort.

Reporting and Management Information

1. Grant recipients will nominate a named individual to act as the main point of contact with the department who will be required to be in regular contact with the department’s grant manager.
2. Grant recipients will provide regular updates and attend meetings to report on progress against the overall programme objectives. Additional detailed reports may be requested to outline future programme activity.
3. Grant recipients will provide management information to meet the needs of the department. These will be subject to further negotiation but the department’s minimum requirements are:
   * Monthly written reports on achievement of key outcomes and milestones as set out in the delivery plan.
   * A minimum of two meetings per grant funded year with DfE policy leads to review overall performance and to set new key performance indicators (KPIs).
   * Monthly finance expenditure reports outlining expenditure against income/invoices. Information should include costs associated with spend relating to staffing, assessment and marketing.

Key Performance Indicators and Finance

1. Figure 2 details the current scholarship programme and associated recruitment targets allocated. Suggested future targets are for guide purposes only and may change.

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| --- | --- | --- | --- | --- | --- | --- |
| Subject | Computing | Geography | Maths | Physics | Languages (MFL) | Chemistry |
| Target  (2017/18) | 92 | 156 | 269 | 142 | 130 | 140 |
| Suggested Target  (2018/19) | 100 | 160 | 270 | 150 | 150 | 150 |
| Suggested Target  (2019/20) | 100 | 160 | 270 | 150 | 150 | 150 |
| Suggested Target  (2020/21) | 100 | 160 | 270 | 150 | 150 | 150 |

***Figure 2. ITT Scholarships current and suggested targets until 2020/21.***

1. Providers are required to explain in their application how they would achieve a similar or greater number of scholars for their priority subject per academic year whilst ensuring quality. This will include demonstrating how they will measure delivery to ensure best value for money. It will also involve having the resource, capability and a clear strategy for achieving our aims for the recruitment of high-calibre scholars to become the next generation of outstanding teachers.
2. Bids are welcome from a wide range of organisations: charitable sector organisations, social enterprises and other not-for-profit organisations, and the private sector.

**Further information**

1. Further information on the scholarship programme is available at:

<https://getintoteaching.education.gov.uk/funding-and-salary/overview/scholarships>

**DOCUMENT 3**

**EVALUATION CRITERIA**

Your bid should set out a response to the seven requirements below, covering three key areas:

* Technical Assessment: a clear strategy for delivering the support required
* Capacity and Capability: having people with the right skills, knowledge and behaviours and having the appropriate governance systems to deliver the service to the required standard; and
* Finance:value for money for the taxpayer.

A minimum quality threshold will be applied. Bids must achieve a minimum score rating of 3 in each section (A-F) in order to be considered for funding.

Your bid should be coherent and consistent throughout and work together as a cohesive whole.

Further details on the requirements are set out on in the **Requirements** section that commences on page 15.

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|  | | **Requirements** | **Weighting** | **Total Marks** |
| **Technical Assessment**  (max 40 marks) | 1. Please set out a clear vision, approach and methodology for delivering a programme that will meet all the objectives and requirements of the scholarship programme. Your response should include how you propose to deliver the programme in line with the specification, including the project aims, outcomes and your strategy for ensuring continuity with the current programme. | 4 | 20 |
| 1. Please describe how you will attract high calibre candidates to the scholarships programme, demonstrating within your response why this is the most appropriate and effective approach. | 2 | 10 |
| 1. Please describe the subject specialist support that you will provide to scholars during their time on the programme. Please demonstrate why this is the best approach. | 2 | 10 |
| **Capacity and Capability**  (max 40 marks) | | 1. Please provide evidence of recent demonstrable experience delivering a similar programme. | 3 | 15 |
| 1. Please provide evidence of skills experience, standing and expertise necessary to delivery (within the delivery team and wider organisation/s). Your answer should include a description of how you will identify and engage with appropriate subject specialist associations to support the scholarship programme. | 3 | 15 |
| 1. Please describe the governance arrangements that you will put in place to ensure the programme is successfully delivered including setting out how you will maximise the grant funding to achieve value for money. | 2 | 10 |
| **Finance**   * + 1. arks) | | 1. Cost.   Bidders must complete the Cost Requirements template as provided below and submit this in the bid documentation.  Costs should be submitted in Pound Sterling exclusive of VAT.  The Cost Requirement evaluation section is weighted at 20%.  The Bid Cost that will be used for the purposes of the evaluation to determine the Bid Cost Score will be the “Contributions from DfE” included in the Cost Requirement Template.    The bid with the lowest Bid Cost will be awarded the maximum score of 20.  The Bid Cost Score will be calculated as follows: Bid Cost Score = (Lowest Bid Cost/Your Bid Cost) x 20 | N/A | 20 |
| **TOTAL** | |  | **100%** | **100** |
| **Other** | | Management information declaration | Not scored |

**Scoring Each Requirement**

Each Technical criteria and Capacity and Capability criteria (A – F) will be scored using a 0-5 rating. The descriptions in the table below will be used to ensure a consistent approach is used when scoring each requirement. The score will then be multiplied by the weighting stated in the table above (e.g. an “excellent” answer to requirement to the *Technical Assessment* section would receive 40 marks).

The maximum number of marks available to any bid is 100.

The evidence matrix below will be used to ensure a consistent approach is taken when scoring bids. Each section will be scored using the rating, multiplied by the weighting (outlined in the table above).

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| **Rating** | **Description** |
| **0** | **No Evidence / no response** |
| **1** | **Poor response:** Very little evidence of appropriate capability, experience or expertise; poor understanding; major weaknesses or gaps in the information provided. |
| **2** | **Unsatisfactory:** Some evidence of appropriate capability, experience or expertise; meets requirements in some areas but with important omissions; weak or inappropriate evidence. |
| **3** | **Satisfactory:** Reasonable evidence of appropriate capability, experience or expertise. Meets most requirements but some minor omissions. |
| **4** | **Very Good:** Detailed evidence provided of appropriate capability, experience or expertise; evidence shows clearly what will be provided and how it will be achieved. |
| **5** | **Excellent:** Very strong evidence of appropriate capability, experience, or expertise; all solutions offered are linked directly to the programme requirements, show how they would be achieved and the impact they will have on other partners. |

**The Requirements – Scoring Criteria**

**Technical Assessment**

[Total: 40 marks]

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| **Technical Requirements: A** |
| This is your opportunity to tell us about your overarching vision and how you plan to deliver a subject specific scholarship programme. Bids will:   * Demonstrate a sound approach and a robust methodology to delivering the scholarships programme, which include clear plans setting out how you will ensure continuity with the current programme. Your response should include a clear rationale for your proposed methodology; * Provide evidence that the proposed approach and methodology will successfully respond to scholars’ needs and meet Department for Education’s specified policy and strategic objectives for the scholarships programme; * Demonstrate your approach to maximising retention amongst scholarship alumni. Your response should include a clear rationale for your proposed methodology; * Identify key options, assumptions, dependencies, risks and issues, with robust approaches to addressing them; and * Consider value for money and how the proposed approach can offer the best possible value to the department. |
| Higher scores will be awarded to bidders that cover all of the above and:   * Set out a clear strategy for delivering the key outcomes; * Identify the all the main challenges and risks and provide practical solutions to overcome them; and * Propose a responsive, highly customer-focused approach. |

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| **Technical Requirements: B** |
| This is your opportunity to tell us about how you will ensure the target market is aware of the programme and your approach to ensuring the very best subject specialists apply. The target market will principally be potential scholars, but we would also like to hear how you plan to raise awareness of organisations that deliver Initial Teacher Training. Bids will:   * Set out an appropriate marketing strategy for attracting and recruiting candidates including evidence of how you have successfully used a similar strategy to reach a target audience in prior projects or programmes. Your response should include a clear rationale for your approach; * Demonstrate how the proposed plan of activities will identify potential, quality and eligibility in applicants applying for the programme; * Set out plans to raise awareness of the programme across Initial Teacher Training delivery organisations including evidence to demonstrate experience of reaching a similar target audience in prior projects or programmes; and * Provide proposed KPIs and targets for applications, scholarships awarded and post programme employment rates. |
| Higher scores will be awarded to bidders that cover all of the above and:   * Set out a clear, convincing and appropriate marketing strategy; * Explain how you will ensure that you recruit the required number of candidates; and * Include a realistic and ambitious recruitment trajectory to cover the lifetime of the grant (three academic years). |

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| **Technical Requirements: C** |
| This is your opportunity to tell us about how you will ensure the content of the scholarship programme is tailored to offer subject specific support to scholars during their Initial Teacher Training year. Bids will:   * Demonstrate expert knowledge of the priority subject and the wider education and education policy landscape; * Set out how subject expertise will be built into the programme in order to increase the professional status of teaching; * Explain how your proposed programme will access to the subject professional community and draw on their expertise; and * Provide evidence of a capability to rapidly forge links with the relevant subject associations and professional bodies. |
| Higher scores will be awarded to bidders that cover all of the above and:   * Provide evidence of prior commitment from the relevant chartered professional body, or a subject association with similar standing, to be part of your scholarship delivery plans. * Provide evidence of your organisation’s standing in the wider subject professional community and set out how this standing and influence will be used to strengthen the programme. |

**Capacity and Capability**

[Total: 40 marks]

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| **Capacity and Capability Requirements: D** |
| This is your opportunity to show us how your organisation has successfully delivered similar programmes: Bids will provide:   * Evidence of recent demonstrable experience of designing and delivering a development or CPD programme that meets identified needs of subject specialists, teachers and/or trainee teachers; * Evidence of recent and demonstrable experience of designing and developing programmes that meet identified business objectives; * Evidence of recent demonstrable experience or working in partnership with DfE or other public sector organisations to deliver a priority programme with clear, identified objectives; and * Evidence of delivering successfully to audiences or customers from the school/HEI/education landscape. |
| Higher scores will be awarded to bidders that cover all of the above and:   * Are able to provide robust, convincing data and evidence to demonstrate the impact of a similar and/or relevant programme that they have recently delivered. |

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| **Capacity and Capability Requirements: E** |
| This is your opportunity to demonstrate that your organisation includes people with the right skills to deliver a prestigious scholarship programme. You also need to demonstrate that your group has the capacity and capability to set up and run the scheme, and that you have access to appropriate educational, financial and other expertise. Bids will:   * Demonstrate a clear delivery team structure, with evidence to demonstrate the skills and experience necessary to deliver the required outcome; * Provide an estimate of the staffing requirements (including the number of days per staff member per annum), other resources and the costs associated in your response; * Demonstrate necessary organisational capacity including evidence of relevant subject expertise and of high standing with the wider subject professional community; * Demonstrate how your organisation is aligned to a royal chartered professional body, or professional organisation with similar standing, specialising in: physics, maths, chemistry, computing, modern foreign languages or geography; and * Demonstrate how the wider subject professional community will be engaged in the programme. |
| Higher scores will be awarded to bidders that cover all of the above and:   * Demonstrate clear subject expertise and provide convincing evidence of your organisation or partnership’s standing within the wider professional community. * Set out named individuals for critical roles. |

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| **Capacity and Capability Requirements: F** |
| This is your opportunity to show us that your organisation has designed governance arrangements and structures that will ensure the programme is delivered as set out in the bid, on time, and in budget. Bids will:   * Identify and describe robust internal governance arrangements and include:   + The key risks facing your proposal and the probability of their occurrence, and explaining your plans for mitigating risks and controlling them if they materialise;   + The key metrics for measuring the success of the service;   + Identify any conflicts of interest and set out how you will manage them (please include perceived and potential conflicts of interests as well as actual ones);   + A security plan that protects departmental and personal data and adheres to any relevant data regulations; and   + Clear reporting mechanisms to ensure that DfE is kept up to date with progress and delivery. * Provide an estimate of staffing, staff costs and other resources required for governance of the programme. |
| Higher scores will be awarded to bidders that cover all of the above and:   * Clearly set out lines of responsibility and accountability that include individuals at appropriate levels of seniority within you own structure and DfE officials as appropriate. |

**Cost Requirements**

[Total: 20 marks]

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| **Cost Requirements: G** |
| You are required to provide an estimate of the number of staff, other resources and the full costs associated with delivering the service in your responses to requirements E and F.  In addition, all bids must include a financial breakdown set out in the Excel spreadsheet provided **(Document 3a),** which must be submitted as an Annex to your proposal. This will allow DfE to compare bids.  The spreadsheet should be completed to set out envisaged financial arrangements for each academic year of the grant period (2018-19, 2019-20 and 2020-21). Your costings must:   * Break down the costs within each row so that it is clear where money will be spent. * Include clear staff costs broken down by functional responsibility. * Indicate if VAT is applicable on any activities, and if so, detail VAT in the relevant row as this will form part of the overall grant award. |
| Any proposal that exceeds the amount of budgeted funding available will be awarded a score of zero. |
| The grant is outside the scope of VAT. Bidders should indicate if VAT is applicable on any activities, and if so, include VAT separately in the relevant line, as this will form part of the overall grant award to the applicant.  Payments will be made by BACS transfer following receipt of a valid invoice.  **Please note:** We expect bidders to think carefully about the resource required to deliver the ITT Scholarships programme. The costs that bidders submit should cover costs of the programme for three years and costs should be realistic and robust.  Once grants have been awarded, the department reserves the right to review the scope and scale of the programme during the grant period to reflect any changes in DfE policy and strategic priorities but any amendments will not be substantial. |

**Management Information**

[Total: Not scored]

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| **Management Information (not scored)** |
| The department will specify the format for providing management information as part of the process of issuing the grant agreement. Organisations, which are subsequently awarded a grant, will be required to agree on the approach to measuring and evaluating the project and the expected impact of planned outcomes.  The successful grant recipients will be asked to provide management information to meet the needs of the department. These will be subject to further negotiation, but will include as a minimum:   * Monthly written reports on achievement of key outputs and milestones; and * Two meetings per grant funded year with department policy leads to review overall performance and to set new key performance indicators (KPIs).   Your bid must indicate that you agree to this requirement in the box provided below. |
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**DOCUMENT 4**

**QUALIFICATION QUESTIONNAIRE AND DECLARATION**

**Section 1 – Potential supplier organisation information**

Please answer the following questions below in full.

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| --- | --- | --- |
| Section 1 | Potential supplier organisation information | |
|  | Question | Applicant Response |
| 1.1 | Full name of the potential supplier organisation submitting the information |  |
| 1.2 | Registered office address (if applicable) |  |
| 1.3 | Registered website address (if applicable) |  |
| 1.4 | Trading status:   1. limited company (registered at Companies House) 2. limited liability partnership 3. other partnership 4. sole trader 5. third sector 6. Charity registered on the charity commission website 7. other (please specify your trading status) |  |
| 1.5 | Date of registration in country of origin |  |
| 1.6 | Company registration number (if applicable) |  |
| 1.7 | Charity registration number (if applicable) |  |
| 1.8 | Head office DUNS number  Please provide us with your Dun and Bradstreet Number, or if a consortium, the lead bidder’s number.  <http://www.dnb.co.uk/dandb-duns-number>  The department uses Dunn and Bradstreet Numbers to manage its data around grant recipients; we strongly encourage all grant recipients to apply for a free Dunn’s numbers. The link to apply is:-  <http://www.dnb.co.uk/myduns> - add ‘GOVERNMENT GRANT RECIPIENT’ as a reason for requesting your D&B DUNS number. **NB. Do not delay returning your bid if you do not have a Dunn and Bradstreet number, returning your bid within the deadline is more important.** |  |
| 1.9 | Registered VAT number |  |
| 1.10 | Trading name(s) that will be used if successful in this application |  |
| 1.11 | **Defining Different Types of Organisations**  The Department for Education is keen to collect information about SMEs. We are particularly interested in discovering how many SMEs apply for our grants through the bidding process.  Completion of the information below is for departmental information purposes only and will have no effect on the evaluation process outcomes. Government is committed to changing how it does business to make sure that small companies, charities and voluntary sector organisations are included and encouraged to compete for our grants.  Relevant classifications (state whether you fall within one of these, and if so which one)   1. Voluntary Community Social Enterprise (VCSE) 2. Sheltered Workshop 3. Public service mutual 4. Are you a Small, Medium or Micro Enterprise (SME)? 5. Other? |  |
| 1.12 | Are you proposing to use sub-contractors? | Yes/No |
| 1.13 | If you responded yes to question 1.12 above, please provide additional details for each sub-contractor in the following table:   |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | Name |  |  |  |  |  | | Registered address |  |  |  |  |  | | Trading status |  |  |  |  |  | | Company registration number |  |  |  |  |  | | Head Office DUNS number (if applicable) |  |  |  |  |  | | Registered VAT number |  |  |  |  |  | | Type of organisation |  |  |  |  |  | | SME (Yes/No) |  |  |  |  |  | | The role each sub-contractor will take in providing the works and /or supplies e.g. key deliverables |  |  |  |  |  | | The approximate % of contractual obligations assigned to each sub-contractor |  |  |  |  |  | |  |

**Section 2 – Grounds for Mandatory Exclusion (Pass / Fail)**

Please answer the following questions in full. Note that every organisation that is being relied on to meet the selection must complete and submit answers for section 2.

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| --- | --- | --- |
| Section 2 | Grounds for mandatory exclusion | |
| Question number | Question | Applicant Response |
| 2.1 | Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below. | |
|  | Participation in a criminal organisation. | YES / NO  If Yes please provide details at 2.2 |
|  | Corruption. | YES / NO  If Yes please provide details at 2.2 |
|  | Fraud. | YES / NO  If Yes please provide details at 2.2 |
|  | Terrorist offences or offences linked to terrorist activities | YES / NO  If Yes please provide details at 2.2 |
|  | Money laundering or terrorist financing | YES / NO  If Yes please provide details at 2.2 |
|  | Child labour and other forms of trafficking in human beings | YES / NO  If Yes please provide details at 2.2 |
| 2.2 | If you have answered yes to question 2.1 please provide further details.  Date of conviction, specify which of the grounds listed the conviction was for, and the reasons for conviction,  Identity of who has been convicted  If the relevant documentation is available electronically, please provide the web address, issuing authority, precise reference of the documents. |  |
| 2.3 | If you have answered Yes to any of the points above have measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? | YES / NO |
| 2.4 | **Non-Payment of Tax**  Has it been established, for your organisation by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of any part of the United Kingdom or the legal provisions of the country in which the organisation is established (if outside the UK), that the organisation is in breach of obligations related to the payment of tax or social security contributions? | YES / NO |
| 2.5 | If you have answered yes to question 2.4, please provide further details. Please also confirm you have paid, or have entered into a binding arrangement with a view to paying, the outstanding sum including where applicable any accrued interest and/or fines.  **Please Note**: The DfE reserves the right to use its discretion to exclude a potential supplier where it can demonstrate by any appropriate means that the potential supplier is in breach of its obligations relating to the non-payment of taxes or social security contributions. |  |

**Section 3 – Grounds for Discretionary Exclusion (Pass/Fail)**

**The DfE may exclude any supplier who answers ‘Yes’ in any of the following situations set out in Question 3.1 – 3.2.** Note that every organisation that is being relied on to meet the selection must complete and submit answers for section 3, Questions 3.1 – 3.2.

The lead applicant organisation must answer all of the following questions below in full.

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| Section 3 | Grounds for discretionary exclusion | |
|  | Question | Applicant Response |
| 3.1 | Please indicate if, within the past three years, anywhere in the world any of the following situations have applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation. | |
| 3.1(a) | Breach of environmental obligations? | YES / NO  If yes please provide details at 3.2 |
| 3.1 (b) | Breach of social obligations? | YES / NO  If yes please provide details at 3.2 |
| 3.1 (c) | Breach of labour law obligations? | YES / NO  If yes please provide details at 3.2 |
| 3.1 (d) | Bankrupt or is the subject of insolvency or winding-up proceedings, where the organisation’s assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under the laws and regulations of any State? | YES / NO  If yes please provide details at 3.2 |
| 3.1(e) | Guilty of grave professional misconduct? | YES / NO  If yes please provide details at 3.2 |
| 3.1(f) | Aware of any conflict of interest due to the participation in the competition?  **Please Note:** The DfE shall take appropriate measures to effectively prevent, identify and remedy conflicts of interest arising in the conduct of a grant application process to avoid any distortion of competition and to ensure equal treatment of all supplier applicants | YES / NO  If yes please provide details at 3.2 |
| 3.1(g) | Shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity, or a prior concession contract, which led to early termination of that prior contract, damages or other comparable sanctions? | YES / NO  If yes please provide details at 3.2 |
| 3.1(h) | Please answer the following statements   * The organisation is guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria. * The organisation has withheld such information.   The organisation has influenced the decision-making process of the contracting authority to obtain confidential information that may confer upon the organisation undue advantages in the competition, or to negligently provide misleading information that may have a material influence on decisions concerning exclusion, selection or award. | YES / NO  If Yes please provide details at 3.2  YES / NO  If Yes please provide details at 3.2  YES / NO  If Yes please provide details at 3.2 |
| 3.2 | If you have answered Yes to any of the questions 3.1(a) 3.1(h) above, explain what measures been taken to demonstrate the reliability of the organisation despite the existence of a relevant ground for exclusion? (Self Cleaning) | Free Text Field |
| **Economic and Financial Standing (questions 3.3 – 3.3C )** | | | |
| 3.3 | As the lead application organisation, are you able to provide a copy of your audited accounts for the last two years, if requested? If yes, please provide separate documents as part of your response.  If no, can you provide **one** of the following 3.3(a) – 3.3(c) answer with Y/N in the relevant box. | Yes/No |
| 3.3(a) | A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation. | Yes/No |
| 3.3(b) | A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position. | Yes/No |
| 3.3(c) | Alternative means of demonstrating financial status if any of the above are not available (e.g. forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status). | Yes/No |
|  | | | |
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**Section 4 - Additional Questions (Not Scored)**

Please answer all of the following questions below in full.

Suppliers who self-certify that they meet the requirements to these additional questions will be required to provide evidence if they are successful at grant award stage.

|  |  |  |
| --- | --- | --- |
| **Section 4** | **Additional Questions** - **Insurance** | **Applicant Response** |
| 4.1 | Please self-certify whether you already have, or can commit to obtain, prior to the commencement of the agreement, the levels of insurance cover indicated below:  Y/N  Employer’s (Compulsory) Liability Insurance = £5M  Public Liability Insurance = £5M Professional Indemnity Insurance = £1M  \*It is a legal requirement to hold Employer’s (Compulsory) Liability Insurance of £5 million as a minimum. Please note this requirement is not applicable to Sole Traders. |  |

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| --- | --- |
| **DECLARATION**  **Note:** Please ensure that a person who is appropriately authorised to act on behalf of your organisation(s) completes the following declaration.  I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate.  I declare that, upon request and without delay I will provide the certificates or documentary evidence referred to in this document.  I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this grant application.  I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.  I am aware of the consequences of serious misrepresentation. | |
| 1) ...............................................……………………………. (Name of bidder) declares that we accept the Department for Education’s standard terms and conditions included at Document 4 Attachment 1 as the basis of the grant; and  2) agree that the department may disclose the Grant Recipients’ information/documentation (submitted to the department during this invitation to bid / call for proposal) more widely within Government for the purpose of ensuring effective cross-Government procurement processes, including value for money and related purposes.  3) declare that we have not communicated to any other party the amount or approximate amount of the bid costs other than in confidence and for the express purpose of obtaining insurances or a bond in connection with this bid. The bid costs has not been fixed nor adjusted in collusion with any third party, and  4) declare that the bid will remain valid until a final decision is made and the grant is awarded.  And that we are not entitled to claim from the department any costs or expenses incurred in preparing the bid or subsequent negotiations whether or not the bid is successful. | |
| **FORM COMPLETED BY** | |
| Contact Name: |  |
| Position (Job Title): |  |
| Signature (electronic is acceptable) |  |
| Date: |  |
| Telephone number: |  |
| Email Address: |  |

**END OF DOCUMENT**