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1. PURPOSE

- 1.1 To co-design and deliver a high quality and rigorous advanced policy and management leadership programme for new Range Es in the Authority as they 'step up' from policy advisor to policy branch lead. The 1st cohorts programme needs to be delivered from January 2017. It will be delivered 2 to 4 times a year to accommodate 4 to 8 cohorts, totalling c.100 participants each year. The programme will be mandatory for new range Es.

2. BACKGROUND TO THE CONTRACTING AUTHORITY

- 2.1 The Authority (Her Majesty's Treasury) is the Government's economic and finance ministry, maintaining control over public spending, setting the direction of the UK's economic policy and working to achieve strong and sustainable economic growth. The Authority aims to be a high performing organisation, able to work effectively with its many stakeholders.
- 2.2 The Authority's vision is for every member of staff to play a full, productive and valued role in ensuring it operates as a high-performing organisation, in an environment that fully reflects its values and is a rewarding, and supporting place to work, with a wide diversity of backgrounds, styles, and working patterns.
- 2.3 There are approximately c.1,200 staff currently employed by the Authority, of which c. 250 are Range Es (equivalent to Civil Service grade 7). New Range Es in the Authority have strong intellectual and analytical abilities, and operate in a department with a reputation for, and culture of, challenge, engagement and debate. Many of the Authority's Range Es have been promoted internally from a policy advisor (Range D) role within the Treasury, often entering the department through the Authority's Graduate Development Programme. Others will have joined the department from elsewhere in the Civil Service, public, voluntary or private sector.

3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

- 3.1 The Authority's Range E Development Programme for policy leaders, is part of the commitment in the Authority's departmental improvement plan, '*Building a great Treasury*,' to introduce a professional development programme for policy makers in the Authority. It will be a new programme, complementing and building on the Graduate Development Programme (introduced in September 2015).

Outcomes and Objectives

- 3.2 The outcomes and objectives for the new learning, are to:
- Clarify what expectations the Authority has of its Range E cadre;
 - Enhance capability of the new Range E cohort, making them more effective, more quickly;
 - Equip new Range Es with the generic skills required of any Range E in HMT that they can apply in their roles;
 - Develop a strong cohort of Ranges Es, making peer learning possible (either formally or informally);
 - Celebrate success, making new Range Es feel valued and motivated, and aiding retention of talented staff; and

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- Direct new Range Es to further recommended training opportunities and support.

Content

- 3.3 **Annex A** sets out an overview of the proposed design of the programme and detailed learning objectives. Following some internal consultation on possible scope of the programme, we intend that it should comprise of 5 modules; 3 action learning sets; a site visit led by the individual; and a closing event. These will be spread over 6 months during a new Range E's first posting in the Authority as they 'step up' from policy advisor to policy lead.
- 3.4 The Authority intends the modules for this programme to be:
- **Module 1: Introduction to management and leadership** (c.2 days) – this will set expectations for the Range E cadre, discuss challenges of a Range E role, offer essential management information and introduce participants to leadership, including work and resource planning.
 - **Module 2: Political awareness and working with Ministers** (c.3 hours) – to equip new Range Es with the skills needed to handle ministerial discussions and navigate parliamentary processes and risks.
 - **Module 3: Problem framing and policy solutions** (c.2 days) – to give new Range Es the skills needed to think through a policy problem in a structured way in order to deliver credible policy advice.
 - **Module 4: People management** (c. 2 days) – a more in depth module for new managers based on a pre-existing Essential Skills for Managers course (see below for further details).
 - **Module 5: Advanced stakeholder management skills** (c. 3 hours) – to enable new Range Es to work and lead effectively through others, and appear credible in front of senior stakeholders.
- 3.5 All five modules should be grounded in strategic thinking skills. It is the Authority's intension that the modules will form part of an inter-linked, seamless development programme, building a learning journey that is exciting, intellectually challenging, and highly relevant for delegates. However as well as forming part of wider programme, the Authority would also like modules 2-5 to be available as stand-alone modules to meet specific demands from other policy staff who will not be on the new Range E programme (for instance, existing, experienced range Es).
- 3.6 The three **Action learning sets** should focus on real life issues/problems to build on the people management, leadership and problem framing/policy solutions modules, bringing the cohort together in small groups of 5 or 6. An **external site visit** will build upon the advanced stakeholder skills module and will be led and organised by the individual related to a stakeholder in their policy area. The visit needs to have purpose and add value to a current piece of work. The **closing event** will involve a presentation by the group to senior managers on what they have learnt throughout the programme.

Specific requirements and background to potential bidders to note for modules 1 to 5, which is not covered in Annex A or B.

Welcome and introduction to management and leadership (module 1)

- 3.7 The first module will set the expectations for the programme and give the essentials around management and leadership, linking to further skills management training in module 4. The Authority have a managers briefing session run by HR and a senior manager and covers the Authority's key management policies that managers need to know. The Authority expects this existing material to be used as content for 'responsibilities as a new manager'.

Political awareness and working with Ministers (module 2)

- 3.8 Range Es are required to be very credible in front of ministers for their policy area, leading meetings and presenting policy options directly to ministers. They need to navigate confidently through parliamentary processes, work with stakeholders and focus strongly on the delivery, implementation and communication of policy. This module will mostly be developed by subject experts in the Authority, but bidders will provide expertise in designing effective learning and critical challenge to ensure the module is engaging and practical during the design phase.

Problem-solving and policy solutions (module 3)

- 3.9 This will be a key module in the programme as new Range Es move to *leading* on key areas of policy and will have a number of policy projects or issues to manage in their branch. Taking a strategic and structured approach to policy making will be even more important at this level, rather than being the policy analyst researching and gathering evidence.

Essential Skills for Managers (module 4)

- 3.10 Since April 2016, the Authority have run an *Essential Skills for Managers* 2 day workshop, plus 3 action learning sets for new line managers. This is a tailored programme, co-designed and delivered by an external provider. The contract with the external provider comes to an end in February 2017.
- 3.11 *Essential Skills for Managers* has had good feedback and the Authority is keen to use as much of this existing material as possible rather than create this module from scratch. Therefore much of the design is already in place for module 4.
- 3.12 The objectives for the existing course are:
- To provide the knowledge and skills required to be a successful people manager in the Treasury;
 - To build awareness of the emotional intelligence required to effectively manage others – particularly if you only manage a small number of staff;
 - To build confidence of new line managers in supporting people effectively;
 - To reinforce the Authority's new management compact; and
 - To support the achievement of the mandatory line management objective.
- 3.13 Bidders will need to:
- Undertake an effective handover with the existing external supplier of the *Essential Skills for Managers* workshop.

- Ensure that this module fits seamlessly within the broader programme and in particular that strong links are made and maintained with module 1.
 - Provide diagnostic tools or questionnaires to help build awareness of the emotional intelligence required to effectively manage others (a current feature of the existing workshop).
- 3.14 In addition to incorporating this material into the range E development programme, the Authority also wishes to ensure this module can continue to stand alone and be available for those new managers in the Treasury who do not undertake the broader Range E programme (e.g. existing range Es; new managers at other grades). The Authority expects to run 2-3 sessions of this module per year outside of the Range E development programme. The standalone module will also need to include the emotional intelligence diagnostic tools and action learning sets.

Advanced Stakeholder Management Skills (module 5)

- 3.15 New Range E policy leaders are representing the Authority at more senior levels so it will be important they build strong relationships and networks to achieve their objectives. They will be faced with more challenging policy environments and usually a key player to influence and handle conflict in their policy area, working through others and incorporating external perspectives.

Requirements of suppliers, governance and working with HMT

- 3.16 We have previously successfully co-designed and delivered a number of learning and development programmes with external suppliers. To be success our external partners need to be able to gain credibility quickly with participants and those supporting the programme and ensure the content is pitched at an appropriately fast-paced and intellectually engaging level.
- 3.17 Ideally, the Authority would like one supplier who can deliver all modules. However, the Authority recognises that there may be areas where specialist expertise may be required, in particular for module 3 (problem-solving and policy solutions). As such the Authority has split the bid into 2 lots giving the option bid for all elements of the programme with or without module 3. Suppliers are welcome to suggest other suppliers to partner with as part of Lot 1 if they need to buy in additional expertise. Suppliers who bid for all elements must also be comfortable with the prospect of working with a supplier for Lot 2 of the Authority's choosing. The Lots the Authority is seeking bids for are:
- Lot 1: Overall programme management, co-design and co-delivery of modules, action learning sets, external site visit and closing event. Inclusion of module 3 is optional.
 - Lot 2: Co-design and co-delivery of module 3 (problem-solving and policy solutions).

LOT 1

- 3.18 An external supplier is required to co-design, co-deliver and manage the programme, linking the modules and learning together into a cohesive whole. The external supplier will work closely with the HR central learning and development team and the

Authority experts (and other suppliers if needed) to design the programme, bringing their learning expertise to the table and challenging the Authority staff in order to achieve the best possible learning outcomes. The Authority envisages varying degrees of co-facilitation and co-design for the different modules, as set out at **Annex B**, though this should be taken only as a rough guide. For example, management sessions will be more supplier led, whereas the Authority will take more of a lead on political awareness/working with ministers.

- 3.19 The Authority have 5 senior sponsors for each of the modules, who will sign off final designed content and may be involved in the delivery to bring the Authority's context into the learning. Each sponsor will be supported by 2-3 managers/policy experts to help with detailed design phase. It will be important for the content to be of high quality.
- 3.20 A small team in HR will oversee and manage the contract with the supplier and be the conduit between supplier and with key stakeholders in the Authority committed to designing, developing and delivering the programme. The HR team will also arrange final sign off by senior management on the Authority's Strategy and Capability Board.

LOT 2

- 3.21 Annex B sets out what the Authority requires of suppliers who bid for module 3. It will be important that such suppliers are comfortable to be managed and led by the supplier awarded Lot 1.

4. SCOPE OF REQUIREMENT

4.1 LOT 1 includes but is not limited to:

- Over-arching programme management including logistics;
- Co-design, delivery, and co-facilitation of modules 1,2 4 and 5;
- Design and delivery of 3 action learning sets;
- Design and facilitation of closing event and guidance for external site visit; and
- Suppliers may bid for module 3 or not, or suggest a sub-contracted supplier to deliver this element.

4.2 Lot 2 includes but is not limited to:

- Co-design and co-delivery of Module 3 (problem-solving and policy solutions).

4.3 Please see **Annex B** which sets out a detailed breakdown of what is required of suppliers, what is excluded and what is optional.

5. THE REQUIREMENT

5.1 Please see **Annex B** for a detailed description of what the Potential Provider is required to provide in order to meet the needs of the Contract.

5.2 In addition to this, the Potential Provider will be required to be available for regular on-site meetings in London, and to have sufficient resources to deliver the programme on time.

6. KEY MILESTONES

6.1 The Potential Provider should note the following project milestones that the Authority will measure the quality of delivery against:

Milestone	Description	Timeframe
1	1 st kick off meeting to scope and plan project, including delivery plan, project milestones and mitigation of risks.	Within week 1 of Contract Award
2	Meeting with key stakeholders for modules 1 -5 to understand requirement and kick of content design.	Within week 1 of Contract Award
3	Sign off of content by senior sponsors	End of November
4	Sign off content with Governance Board (Strategy and Capability Board).	Mid December 2016
5	Final revisions to content	4 December 2016
6	Delivery of programme to 1 st cohorts commences (module 1) Welcome and introduction to management and leadership	w/c 23 January 2017
7	Delivery of module 2: Political awareness and working with ministers (half a day)	By end January/early February
8	Plan further cohorts on programme – (cohorts possibly commencing May 2017)	February

9	Delivery of module 3: Problem framing and policy solutions (2 days)	By end February
10	1 st action learning set (2 hours)	w/c 27 March
11	Delivery of module 4: Essential management skills (2 days)	w/c 10/11 April
12	Delivery of module 5: Advanced stakeholder skills	w/c 8 May
13	2 nd action learning set (2 hours)	w/c 15 May
14	3 rd action learning set (2 hours)	w/c 19 June
15	Closing event	w/c 10 July

7. AUTHORITY'S RESPONSIBILITIES

7.1 The Authority's staff will be heavily involved in the design and delivery of the programme. Delivery timescales will therefore need to have full regard to:

- other Authority learning and development programme timescales (e.g. Graduate Development Programme);
- the Authority's business cycles e.g. fiscal events – Autumn Statement (November/December), the Budget (March) and
- any other major events that will impact on HMT capacity to design or deliver.

8. REPORTING

8.1 The Authority will expect an evaluation on the quality and impact of the programme on individual learning, performance and the business. A short review after the first cohort, with any redesign required should be included in the quoted price. A more thorough evaluation should be completed at the end of year 2.

9. VOLUMES

9.1 As mentioned above, the programme will be delivered 2 to 4 times a year to accommodate 2 to 4 cohorts of c.18 per cohort, totalling c.70 participants each year. It is likely that initially the Authority will want to run 2 cohorts in parallel in January 2017 and Summer 2017, where it will be important to have regard to key Authority business cycles when scheduling the programme (see 8.1 above).

9.2 We expect the contract to run for 2 years, with the option of extending the contract for a further 2 years subject to mutual agreement.

10. CONTINUOUS IMPROVEMENT

10.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

10.2 The Supplier should present new ways of working to the Authority during monthly Contract review meetings.



- 10.3 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

11. SUSTAINABILITY

- 11.1 The Potential Provider should have regard to minimising the environmental impact of running the programme, through for example using digital means of delivery wherever possible to minimise paper use.

12. QUALITY

- 12.1 The Potential Provider should be willing to provide references from other organisations they have provided similar services for. Intended facilitators proposed by the Potential Provider should have appropriate training qualifications, and/or significant experience in delivering training to high performing individuals.

13. PRICE

- 13.1 The Potential Provider should provide prices for all elements of the programme, in particular showing design, programme management and delivery costs separately for each of the modules and rate cards to be used for additional work as required.
- 13.2 Prices are to be submitted via the e-Sourcing Suite by completing Appendix E – Pricing Schedule excluding VAT.

14. STAFF AND CUSTOMER SERVICE

- 14.1 The Authority requires the Potential Provider to provide a sufficient level of resource throughout the duration of the Range E Development Programme Contract in order to consistently deliver a quality service to all Parties.
- 14.2 Potential Provider's staff assigned to the Range E Development Programme Contract shall have the relevant qualifications and experience to deliver the Contract.
- 14.3 The Potential Provider shall ensure that staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

15. SERVICE LEVELS AND PERFORMANCE

- 15.1 The Authority will measure the quality of the Supplier's delivery through the following KPIs:

KPI/SLA	Service Area	KPI/SLA description	Target
#1	Programme Management and Design	Programme designed within project timescales with risks mitigated	Timescales met, risk mitigated
#2	Quality of content	Content relevant and of high quality, keeping the audience continuously engaged and learning valued.	95% satisfaction from participants
#3	Delivery timescales	Programme delivered to timescales to meet demand with full mandatory attendance on all sessions.	100% attendance by cohort.
#4	Other supplier management	Lead supplier for Lot 1 to ensure design and delivery timescales met.	Timescales met.
#5	Evaluation	Evaluation completed within timescales with actions for continuous improvement planned	Evaluation deadlines met and all agreed actions taken forward.

- 15.2 Supplier performance will be monitored and measured against agreed KPI's at regular meetings between the Authority (the HR team managing the contract) and Supplier (programme/project lead) so that remedies/action for poor Supplier performance can be agreed.
- 15.3 If poor Supplier performance continues following agreed remedies/action then the Authority reserves the right to terminate the Contract early.

16. SECURITY REQUIREMENTS

- 16.1 Trainers will be required to possess or obtain Government security clearance in order to access the Authority building and resources. This will involve providing proof of identify, proof of address checks, and the completion of a short online form.

17. INTELLECTUAL PROPERTY RIGHTS (IPR)

- 17.1 HM Treasury/Crown will own the design and content of the whole Range E development programme.



18. PAYMENT

- 18.1 The Potential Provider should provide a payment schedule with phased payments following major milestones. Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.
- 18.2 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

19. ADDITIONAL INFORMATION

N/A

20. LOCATION

- 20.1 The location of the Services will be carried out at HM Treasury's London offices, 1 Horse Guards Road, London SW1A 2HQ, or suitable external venue close by.