



MOD Commercial

MoD Contract 700606368
Managed Learning Services Framework (RM3822)
Knowledgepool Ref: PSGW01537

A Training Needs Evaluation for the Queen Elizabeth Class Aircraft Carriers

This Contract is made

BETWEEN (1) **HER BRITANNIC MAJESTY'S SECRETARY OF STATE FOR DEFENCE**, acting by Defence Commercial Commands & Centre Navy, Building 1/080, Jago Road, HM Naval Base, Portsmouth, Hampshire, PO1 3LU ("the Authority")

AND (2) **Capita Business Services Ltd**, 30 Berners Street, London, W1T 3LR

1. The Contractor shall provide the Services described in the Statement of Requirements, in accordance with the Conditions of Contract (as detailed in Framework Schedule 4 - Order Form and Call-Off Terms for the Framework Agreement entered into between the Authority and the Supplier on RM3822), the firm prices attached and the Contractor's Work Order (WO) Reference PSGW01537.
2. The Contract shall come into effect on **28th September 2020** and expire **31st March 2021**.
3. Except where there is prior written approval from the Commercial Branch no payment shall be made for work performed which is outside the scope or period of the Contract.
4. If there is a conflict between the documents described in Paragraph 1 above the order of precedence shall be:
 - a. Work Order (WO) Reference PSGW01537.
 - b. Statement of Requirements at Schedule 1.
 - c. Conditions of Contract (as detailed in Framework Schedule 4 - Order Form and Call-Off Terms for the Managed Learning Services dated 4 July 2017 - to the Framework Agreement entered into between the Authority and the Supplier on RM 3822).

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Schedule 1 – Statement of Requirements

References

A. JSP 822 (V3.2 Jun 19).

Background

1. 28 Training Needs Analysis (TNA) studies were conducted in support of training design for the Queen Elizabeth Class (QEC) aircraft carriers as early as 2008 at a cost in excess of £2M. Since 2008 sweeping changes have been enacted over Royal Navy (RN) training pipelines and schools with the implementation of Programme Faraday and the Maritime Training Strategy. A training needs evaluation (TNE) as recommended in Reference A is intended to re-evaluate the chosen training solutions to ensure they are still fit for purpose and cost effective in the current environment.
2. 16 K-Courses¹ support QEC training however in many cases the RN has limited DSAT documentation relating to these courses and there is no formal route to evaluate or adjust the training. This represents a risk that the RN cannot guarantee the effectiveness, consistency, value for money or safety of these courses.

Requirement

3. This Statement of Requirement (SoR) outlines the requirement to conduct initial activities of a TNE of QEC training. This will represent the first stage of a two-part TNE:
 - a. Part one (described by this SoR) will conduct priority assurance activity in FY20/21 (focused on K-Courses and EXVAL) and provide a scoping report to inform the requirement for part two.
 - b. Part two will be conducted based on the recommendations of part one in FY21/22.
4. The supplier shall provide elements of a TNE completed to the standards prescribed at Reference A.

Travel

5. There may be a requirement for travel to stakeholder locations which include but are not limited to: Her Majesty's Naval Base Portsmouth, MOD Abbey Wood (Bristol) and various K-Course locations (listed in Annex A). Stakeholder contact details will be provided at the initial kick-off meeting, but the tender should account for all travel costs associated with all reasonable stakeholder engagements required to carry out the work.

Security Clearance

6. The conduct of the TNE requires access to material up to Secret. At the start date of the contract, all personnel must have as a minimum requirement, SC level security clearances to access this material.
7. Up to Secret materials will consist of observations during visits to Royal Navy ships and discussions with Ship's crew.

¹ Courses provided by industry covering specific elements of QEC training which cannot be delivered through RN training schools.

8. **All documentation and information provided to the contractor must be kept confidential and only accessed on a need-to-know basis and must be destroyed or returned on completion of the scope of work.**

Dependencies

9. In response to requests from the Supplier, the Authority will endeavour to arrange access to:
- a. MOD sites e.g. dockyards and training schools,
 - b. MOD personnel e.g. individuals who have attended courses,
 - c. Industry sites e.g. locations listed in Annex A and
 - d. Industry personnel e.g. instructors of K-Courses.
10. Access to requested sites or personnel may be delayed due to factors beyond the Authority's control. The Supplier will be required to demonstrate a flexible approach to building up the task and resourcing.
11. Access to third party, industry sites or personnel may incur further cost to the Authority. Tenders are required to provide detail of access required to industry sites/personnel to allow the Authority to accurately evaluate the cost of bids.
12. Tenders will specify assumptions, constraints and Authority dependencies.

Government Furnished Information / Equipment

13. Noting the absence of DSAT documentation for K courses, the Authority shall provide any relevant training documentation held to the supplier at the start of the contract; the supplier may request any additional information.

Governance

14. The QEC Training Capability Steering Group (TCSG) will oversee the endorsement of any deliverables and will be the point of contact for the duration of the work.
15. Deliverables as described in Annex B will be reviewed in accordance with the endorsement process detailed at Annex C. Payment of milestones to the supplier will only be authorised on TCSG endorsement in accordance with the schedule in Annex D.
16. The contract will be managed by the Maritime Training Acquisition Organisation (MTAO) through an initial start-up meeting followed by monthly Status Reports to MTAO from the supplier and progress review meetings at periodicities set at the start-up meeting.

Supplier and Suitably Qualified and Experienced Personnel

17. The supplier must be able to provide personnel that meet the following criteria to produce the deliverables:
- a. Must have a thorough understanding of the Defence Systems Approach to Training (DSAT) and demonstrable experience in writing Training Needs Analyses, Training Needs Evaluations (or Post Project Evaluations) and DSAT assurance activities.
 - b. Must have a demonstrable track record of consistent on-time delivery of TNA deliverables to high standards.

- c. Should have good naval knowledge, preferably with demonstrable experience. Experience from other sectors aligned with the Royal Navy, such as wider MOD and Defence, will be considered with suitable justification and risk mitigation by the supplier.
- d. Should be prepared to work in an iterative and collaborative manner, accepting and incorporating stakeholder input and feedback.

18. Suitable evidence may consist of relevant TNE/TNAs or other training analysis work, CVs and samples of work (or accessible references) where the author is clearly identified. Testimonials, where provided, must have an identifiable source (exact post and/or name and rank). They are only to be included where current contact details can be provided, and the individual has given consent to be contacted by MTAO to discuss the reference in context.

19. The supplier must provide a resource plan with a breakdown of resources required from the Authority to allow them to effectively conduct the TNE. This should be detailed in a resource plan.

20. The supplier must provide evidence of their risk management process including how new risks, constraints and assumptions will be communicated.

21. The supplier must provide details of relevant MOD contracts completed over the previous 5 years.

Duration

22. The proposed duration for this task from 27 Jul 20 until 31 Mar 21.

Annexes:

- A. K-Course Details.**
- B. Detailed requirement for the delivery QEC TNE.**
- C. Endorsement of deliverables.**
- D. Proposed pricing schedule.**

K-COURSE DETAILS

K Courses	Supplier	Venue	Branch	Length (Days)
IPMS Maintainer				
IPMS Train the Trainer				
Nitrogen Plant Maintainer				
FPN/FDN Maintainer course				
FPN Operator Trainer				
Aircraft Lifts Maintainer				
Ship Lifts Maintainer				
QEC Integrated Electrical Propulsion Maintainer				
QEC EPCAMS Maintainer-Operator				
INBS Maintainer				
AGILOG maintainer				
Visual Landing Aids maintainer				
ATC / CMS Maintainer				
TACAN Maintainer				
IFF Maintainer				
MHE Driver/Maintainer				

DETAILED REQUIREMENT FOR THE DELIVERY OF A TRAINING NEEDS EVALUATION FOR THE QUEEN ELIZABETH CLASS**Deliverables**

1. While the minimum requirements are outlined below, potential TNE suppliers will be assessed on the basis of their proposal to add further value in terms of versatile, cogent and thorough analysis. The deliverables of the TNE listed below should be produced in accordance with the guidance outlined in JSP 822 Part 2 (V3.2 Jun 19) pages 13-75 (TNA Process) and pages 222-266 (assurance), as well as any direction given either in this SoR, or in subsequent discussion with the TCSG. Further guidance can be found in the Maritime Acquisition Training Line of Development Guidance Part 1: Project Team Guidance which is available on the Knowledge in Defence GP2.8 page. Such requirements, updated through discussion or clarification activities, will be finalised prior to contract award.
2. A proposed delivery timeframe, where C = date of contract award, is shown below. There will be flexibility over these dates depending on availability K-Course deliverers, SME availability, and leave periods of schools, ships and RN personnel. The order of deliverables will be decided at the kick-off meeting to take into account leave periods of QEC ships; the TCSG may agree to a revised ordering of the below albeit with similar timeframes.
 - a. **Deliverable 1 by C+3 Weeks: Training Support Plan (TSP):** Conduct a kick-off meeting with elements of TCSG and agree the plan and timelines for delivery to include resource allocation, timelines, as well as identify the methods by which SMEs will be engaged. Consideration will be given as to the best way to “batch” K-Course analysis based upon subject matter and availability of stakeholders. Agree strategy and timelines for conducting targeted EXVAL of QEC Ships’ Companies. The TSP will also identify any training policy or funding constraints that may affect the TNE and specify who is responsible for the management of the TNE process and how the outputs will be measured. The TSP will be maintained as current throughout the TNE process.
 - b. **Deliverable 2 by C+8 Weeks: Batch 1² K-Course Analysis Report:** The deliverable shall present an analysis of the first batch of K-Courses. The report shall identify any gaps between TNA outputs and K-Course delivery. Where no TNA was conducted for a K-Course the report shall investigate whether a requirement exists and if so, shall capture these cases for scoping Part 2 of the TNE within Deliverable 6. The report shall include an analysis of the K-Courses’ associated documentation highlighting how far training activities can be demonstrated to be safe and conducted in accordance with the standards laid down in Reference A. The report shall identify what methods are being used to capture and record attendance of personnel on K-Courses.
 - c. **Deliverable 3 by C+13 Weeks: Batch 2 K-Course Analysis Report:** As per deliverable 2 for the second batch of K-Courses.
 - d. **Deliverable 4 by C+18 Weeks: Batch 3 K-Course Analysis Report:** As per deliverable 2 for the third batch of K-Courses.
 - e. **Deliverable 5 by C+24 Weeks: EXVAL Report:** The deliverable shall present an analysis of targeted EXVAL conducted as agreed in the TSP. The supplier will have

² All “batches” as agreed in kick-off meeting.

consulted QEC Ships' Companies and analysed S3018s to identify any training shortfalls or areas for improvements. The report shall be presented by department identifying risks to life and capability gaps. The supplier will have prepared justified recommendations for either modifications to training, further research or "do nothing" options.

f. **Deliverable 6 by C+28 Weeks: Scoping Report for TNE Part 2:** The supplier will provide recommendations for areas of focus and scope for part 2 of the TNE. The supplier should present justified recommendations for priority areas of focus including, if necessary, against any role performance statements. The supplier may conduct a review of the processes, products and/or costs of one or more TNAs as per Reference A (part 2 pages 13-62).

Definitions

3. Definitions used for describing the deliverable are:

- a. **Must / shall.** Failure to comply with this requirement will result in the deliverable failing to be endorsed.
- b. **Should / could.** It is strongly recommended that this is included. Any other method or approach will be considered, provided it achieves the outlined aim to the TCSG's satisfaction.
- c. **May.** This may be included if it adds value to deliverable.

Governance

4. The TCSG will oversee the endorsement of any deliverables and will be the point of contact for the duration of the work. The TCSG chaired by Hd N7 with NAVY TRG HQ-CS TCM as secretary will invite representatives to comment on deliverables as required and may choose to endorse deliverables either in or out of committee.

Required Content

5. All deliverables under this requirement will be subject to review and acceptance by the TCSG in accordance with the endorsement process detailed in Annex C.

6. The following are stakeholders in the TNE and should be consulted during its production in addition to the TCSG membership:

- a. Training Establishment course managers.
- b. QEC Training Project Support Manager (TPSM).
- c. Relevant Course Instructors.

7. Abbreviations shall be defined in a taxonomy which shall utilise the naval taxonomy where in common use.

8. All analysis must show clear evidence that MOD and Single Service training strategy and policy has been understood with implications and dependencies thoroughly considered.

9. The supplier shall warrant all documents, evidence and pictures provided in support of the deliverables will become Crown property, entirely free for use by the TCSG for further use in any downstream activities. Bidders are to warrant that they will not attempt to re-sell, re-use or

distribute such documents, evidence and pictures obtained or generated in the course of this task without the express permission of the Authority.

10. All deliverables must be written in plain English, with good spelling and grammar. Further they must be written using unequivocal language that states the relevant points clearly and precisely.

11. All media and documentation are to be provided in an electronic format which is editable and compatible with the IT and training management systems used within the training schools or by contractors.

12. All deliverables must be supported throughout by evidence that has been clearly audited and referenced. All risks and assumptions shall be captured and formally passed to the TCSG for recording within the overarching project Risk Register and Master Data Assumption List (MDAL).

13. Any alternative processes or classification systems used within the TNE process must demonstrate, to the TCSG's satisfaction, as being at least as effective as those defined in Reference A.

14. It is imperative that the TNE provides a detailed audit trail in order for any deliverables to be endorsed by the SMEs within NCHQ TNA QA authority and the TCSG endorsing members. Payment of milestones is dependent on TCSG endorsement.

ENDORSEMENT OF DELIVERABLES

1. The TCSG, either in or out of committee, will be called upon to validate ALL deliverables, identifying any concerns or direction for further work back to the supplier. Each product will be endorsed as a separate product and full endorsement will be conferred upon delivery of all products; endorsement of this final deliverable will reflect successful completion of the entire task.
2. A review of assumptions, risks and findings must be undertaken prior to the release of each subsequent deliverable; pursuing such an iterative approach is critical to ensuring the final output is as up-to-date and relevant as practicable.
3. The review and endorsement process runs as follows:
 - a. Each deliverable will be circulated for comment and consideration to the TCSG.
 - a. Members will have 15 working days to respond to NAVY TRG HQ-CS TCM with their comments.
 - b. Collated comments will be passed to the supplier for action, with a TCSG to be held no sooner than 3 working days later.
 - c. Subject to all comments being actioned, the deliverable can then be endorsed by the TCSG.
 - d. If the deliverable cannot be endorsed and requires re-work, the supplier will then submit an updated version for the above process of circulation and comments with another 15 working days for TCSG review.
 - e. The deliverable may, on occasion, be endorsed out of committee by TCSG endorsing members.
4. Deliverables may be re-submitted and reviewed as many iterations as is necessary to gain TCSG endorsement. Without endorsement, payment cannot be authorised.
5. The TCSG will oversee the endorsement of any deliverables and will be the point of contact for the duration of the work.

PROPOSED PRICING SCHEDULE

Milestone	Description	Percentage of total contract value
1	Deliverables 1 and 2 – TSP and K-Course Batch 1 Report	20%
2	Deliverable 3 - K-Course Batch 2 Report	20%
3	Deliverable 4 - K-Course Batch 3 Report	20%
4	Deliverable 5 – EXVAL Report	20%
5	Deliverable 6 – TNE Part 2 Scope	20%

Bidders may request variation to the pricing schedule but must provide reasons for the request. Acceptance of a request to vary the pricing schedule should not be presumed by any bidder.

The definitive pricing schedule agreed by both Customer and Supplier is to be captured within the Statement of Work for the task

Schedule 2 – Pricing Schedule

Total price to MOD ex VAT: £132840.05

Schedule 3 - Addresses and Other Information

1. Commercial Officer

8. Public Accounting Authority

1. Returns under DEFCON 694 (or SC equivalent) should be sent to DBS Finance ADMT – Assets In Industry 1, Level 4 Piccadilly Gate, Store Street, Manchester, M1 2WD
☎ 44 (0) 161 233 5397

2. For all other enquiries contact DES Fin FA-AMET Policy, Level 4 Piccadilly Gate, Store Street, Manchester, M1 2WD
☎ 44 (0) 161 233 5394

2. Project Manager, Equipment Support Manager or PT Leader
(from whom technical information is available)

9. Consignment Instructions

The items are to be consigned as follows:

In accordance with the Statement of Requirements

3. Packaging Design Authority

(Where no address is shown please contact the Project Team in Box 2)

10. Transport. The appropriate Ministry of Defence Transport Offices are:

A. DSCOM, DE&S, DSCOM, MoD Abbey Wood, Cedar 3c, Mail Point 3351, BRISTOL BS34 8JH
Air Freight Centre
IMPORTS ☎ 030 679 81113 / 81114 Fax 0117 913 8943
EXPORTS ☎ 030 679 81113 / 81114 Fax 0117 913 8943
Surface Freight Centre
IMPORTS ☎ 030 679 81129 / 81133 / 81138 Fax 0117 913 8946
EXPORTS ☎ 030 679 81129 / 81133 / 81138 Fax 0117 913 8946

B. JSCS

JSCS Helpdesk No. 01869 256052 (select option 2, then option 3)
JSCS Fax No. 01869 256837
www.freightcollection.com

4. (a) Supply/Support Management Branch or Order Manager:

Tel No: 02392 720250

(b) UIN – N6029A (c) RAC – NGA003

11. The Invoice Paying Authority (see Note 1)

Ministry of Defence ☎ 0151-242-2000
DBS Finance
Walker House, Exchange Flags Fax: 0151-242-2809
Liverpool, L2 3YL
Website is:
<https://www.gov.uk/government/organisations/ministry-of-defence/about/procurement#invoice-processing>

5. Drawings/Specifications are available from

See Box 2

6. For contracts containing DEFCON 5, mauve Copies of MOD Form 640 are to be sent to

(where no address is shown the mauve copy should be destroyed)

12. Forms and Documentation are available through *:

Ministry of Defence, Forms and Pubs Commodity Management
PO Box 2, Building C16, C Site
Lower Arncott
Bicester, OX25 1LP (Tel. 01869 256197 Fax: 01869 256824)
**Applications via fax or email: DESLCSLS-
OpsFormsandPubs@mod.uk**

7. Quality Assurance Representative: NAVY RP-P3M ACQ SO2

Commercial staff are reminded that all Quality Assurance requirements should be listed under the General Contract Conditions.

AQAPS and **DEF STANs** are available from UK Defence Standardization, for access to the documents and details of the helpdesk visit <http://dstan.uwh.dii.f.r.mil.uk/> [intranet] or <https://www.dstan.mod.uk/> [extranet, registration needed].

NOTES

1. Forms. Hard copies, including MOD Form 640 are available from address in Box 12., All other invoicing forms e.g. AG Forms 169 and 173, are available from the website address shown at Box 11.

2.* Many DEFCONs and DEFFORMs can be obtained from the MOD Internet Site:
<https://www.aof.mod.uk/aofcontent/tactical/toolkit/index.htm>