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**1. PURPOSE**

1.1 The purpose of this requirement is to provide a report setting out the impact and value for money of the Treasury’s flagship people development programmes. Due to other demands on the project sponsor, the Authority is looking for a very small team or single consultant to carry out the analysis and run the project.

**2. BACKGROUND TO THE CONTRACTING AUTHORITY**

2.1 HM Treasury is the UK’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.

2.2 It employs c.1,250 staff, most of whom work directly on policy – including 50-100+ a year through a direct, graduate entry route.

2.3 With a number of pressing policy challenges, we need our staff to have the skills needed to achieve the highest standards of analysis and policy advice. As such, HMT dedicates significant resource to developing staff. The learning offer includes a 23-day graduate development programme (GDP) for graduate recruits, and an 8.5 day course on policy leadership and management excellence (the Policy Leadership Programme/PLP) for those further on in their careers. Other parts of the offer include talent development, and more targeted courses on writing skills and aspects of economics.

2.4 There is a focus on peers training peers and each programme has significant input from HMT staff in terms of course content and delivery.

**3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**

3.1 The Treasury requires the Potential Provider to carry out an independent full analysis of the impact and Value for Money (VfM) of the development investment to ensure our staff, the organisation and the tax payer are realising the full benefit.

3.2 The output of this requirement will be a report in power point format which contains the results and conclusions from this analysis. It should use qualitative and quantitative evidence to address at least the following questions:

3.2.1 What is the impact on retention and performance from the development offer?

3.2.2 Could we achieve the same or improved outcomes with less inputs? If so, how?

3.2.3 How do our investment and outcomes measure against those of comparable organisations in public and private sector?

**4. DEFINITIONS**

Expression or Acronym	Definition
HMT	HM Treasury



GDP	Graduate Development Programme
PLP	Policy Leadership Programme
OGD	Other Government Department

## 5. SCOPE OF REQUIREMENT

5.1 The scope of requirement is defined as follows:

5.1.1 In scope: centrally funded development – including PLP; GDP and talent programmes which make up a large proportion of the overall budget, as well as shorter and more focused courses; L&D theory (e.g. how to measure the success of learning interventions); benchmarking - how other leading public and private sector organisations do things; future of L&D; value for money and impact of spend; how to maintain relevance of the L&D offer in future and evaluate on an ongoing basis.

5.1.2 Out of scope: contractual L&D arrangements; pay/pensions/talent strategy. Future development priorities for HMT (this is not a diagnostic exercise - future development areas may be revealed through the research which we are interested in recording and mapping); courses sponsored by individual groups within HMT (i.e. not centrally); cross-Civil Service courses.

## 6. THE REQUIREMENT

6.1 There are three parts to the work and we expect the final report to use both qualitative and quantitative information to address at least the following specific questions:

### 6.1.1 Phase 1 – Benchmark (against other comparable organisations):

- HMT spend on L&D in the past 3 years from the centre and at group level.
- The volume and content of mandated training;
- The percentage that is outsourced vs provided in-house, and how it has changed.
- HMT’s L&D model (e.g. role of central learning and development team, degree of centralised vs group-run programmes; level of engagement with X-Whitehall learning).
- The admin burden (estimates of staff cost) on the business from supporting/volunteering to deliver courses and how this has changed over time.
- The culture towards L&D in HMT – attendance/levels of underspends by group/grade/profession.
- Link with career progression.
- Percentage of spend in OGDs, Whitehall, comparable private companies on L&D, and the sorts of things this money is spent on (e.g. executive



coaching versus induction for new graduates) compared to focus of HMT spend.

- What does L&D best practice look like in comparable organisations and how does this compare to current practice in HMT?

#### 6.1.2 **Phase 2 – Measure Impact.**

##### 6.1.2.1 Retention:

- Assess extent to which it is possible to discern the impact of L&D on retention;
- Within these constraints, try to assess the impact of: (a) GDP, (b) other programmes on retention;
- Consider if there is anything else we could do in the L&D sphere that would increase retention.

##### 6.1.2.2 Performance:

- How far is the total offer helping staff ‘hit the ground running’, feel more equipped to do their job; have skills and knowledge for this role and future roles?
- Which are the most effective and which the least effective? Anything that is patently not effective? (E.g. some of shorter in-house courses?)
- Anything more we should be doing to make our offer more effective?
- How responsive is the L&D offer to the business needs etc. How do opinions/experiences differ by grade?

#### 6.1.3 **Phase 3 – Measure Value for Money**

- How far, and how, could we get the same impact for less time and money?
- For example, would shorter core courses (GDP/ PLP) deliver similar outcomes? Is there deadweight?
- To what extent would outsourcing offer better value than our current model of supporters/ in-house provision? If so, which elements should be outsourced?
- Could we leverage technology more? What about making many more of our courses video/e-learning? Which are the likely candidates given feedback?



- What about how the L&D team operate and group procurement of training? How does this compare with other models in terms of procurement/ buying power?

#### 6.1.4 **Conclusions**

- 6.1.4.1 How far has the current L&D programme achieved its intended objectives?
- 6.1.4.2 How far does it offer value for money vs the alternatives?
- 6.1.4.3 Future recommendations:
  - Provide a suite of options – e.g. “if your development priority remains as XX then YY is most effective option. If your priority shifts to AA then consider BB.”
  - Options for keeping the development offer from the centre of the Department relevant

### 7. **KEY MILESTONES**

7.1 We have allowed 9 weeks from awarding contract to agreeing a final report. The project milestones reflect a 9 week project, however there is an option to extend for a further 3 weeks.

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

Milestone	Description	Timeframe
1	Inception meeting to agree approach to project, including time lines and milestones.	Within 1 week of contract award
2	Complete first phase of quantitative work and initial stages of qualitative work	Within 4 weeks of Contract Award
3	Completion of all qualitative and quantitative research.	Within week 6
4	Deliver interim report with headline conclusions	Within week 7
4	Deliver final report	Within week 9

### 8. **AUTHORITY’S RESPONSIBILITIES**

8.1 The Authority will make staff available for interview / focus group research. It will provide rooms and the logistical support for scheduling meetings. It will also facilitate the transfer of management information in a secure (and anonymised) format e.g. to measure turnover and track promotion.



8.2 The exact management information requirements and feasibility are to be agreed between the contractor and the Human Resources Management Team at the inception meeting or soon after.

**9. REPORTING**

9.1 Weekly progress updates – format to be agreed with supplier.

**10. VOLUMES**

10.1 Not Applicable.

**11. CONTINUOUS IMPROVEMENT**

11.1 The Potential Provider will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

11.2 The Potential Provider should present new ways of working to the Authority during weekly contract review updates.

11.3 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.

**12. SUSTAINABILITY**

12.1 Not applicable.

**13. QUALITY**

13.1 The final report must reflect feedback from the contracting authority. Please outline any relevant qualifications in supporting documentation (CV).

**14. PRICE**

14.1 Prices are to be submitted via the e-Sourcing Suite Appendix E excluding VAT.

**15. STAFF AND CUSTOMER SERVICE**

15.1 The Authority requires the Potential Provider to provide a sufficient level of resource throughout the duration of the Provision of Consultancy for Learning & Development Assessment Contract in order to consistently deliver a quality service to all Parties.

15.2 Potential Provider’s staff assigned to the Provision of Consultancy for Learning & Development Assessment Contract shall have the relevant qualifications and experience to deliver the Contract.

15.3 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.

**16. SERVICE LEVELS AND PERFORMANCE**

16.1 The Authority will measure the quality of the Supplier’s delivery by:

16.1.1

KPI/SLA	Service Area	KPI/SLA description	Target
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1	Delivery Timescales	Meet deadlines in table 7.	100%
2	Quality	Answer all questions set out in section 3	100%
3	Engagement	Use weekly meetings, in particular at interim report stage, to ensure analysis is fit for purpose for HMT.	100%

**17. SECURITY REQUIREMENTS**

17.1 The Potential Provider must have or be prepared to undergo standard Government security clearance (Counter Terrorist Check), in order to secure building passes, access to IT - etc.

**18. INTELLECTUAL PROPERTY RIGHTS (IPR)**

18.1 In line with the Terms and Conditions of Contract.

**19. PAYMENT**

19.1 The Potential Provider is to issue invoices to the authority at key stages throughout the study. Payment is to be aligned to deliverables as annotated within Section 7 of this document (Key Milestones 2-4), in line with contracted prices.

19.2 Before payment can be considered, each invoice must include a detailed and itemised breakdown of work completed, links to Key Milestones and Objectives and the associated costs.

**20. ADDITIONAL INFORMATION**

20.1 Not Applicable.

**21. LOCATION**

21.1 The location of the Services will be carried out at is HM Treasury, 1 Horse Guards Parade, SW1A 2HQ.