



Ministry
of Defence

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Your Reference:

POTS ITN

Our Reference:

FLEET/00428

FAO:
POTS Tenderers

22 November 2016

Dear Sir/Madam

Invitation to Negotiate

ITN Reference FLEET/00428 – Provision of Outsourced Training Services for the Royal Navy

1. You are invited to submit an initial tender prior to negotiation for the Provision of Outsourced Training Services (POTS) requirement in competition in accordance with the attached documentation.
2. The requirement is to provide an outsourced training service for Navy Command shore training establishments and site lodgers from 1 January 2018. Flag Officer Sea Training for the Royal Navy will require replacement of training delivery, management and support services (Current Contract Fleet Outsourced Activities Programme (Training) - FOAP(T) FLEET/SP2/0006) in addition to the implementation of training optimisation as specified in Enclosure 1 Appendix 1 to Section D. There is an option, from 1 February 2021, to provide the services delivered by the Fire Fighting Training Services (FFTU) as specified in Schedule 2, Statement of Requirement, Annex L.
3. Funding has been approved and the budget is £330m GBP (ex Vat) for the contract period 1 January 2018 to 31 March 2028.
4. The anticipated date for the contract award decision is 2 October 2017, please note that this is an indicative date and may change.
5. You must submit your Initial Tender to arrive no later than 13:00 30 January 2017. The Tender must be submitted in two forms as instructed at Section E. It is a requirement to submit one priced hard copy of the tender documents which is to be submitted to the Tender Board with the enclosed Tender Return Label (DEFFORM 28) attached to the outer packaging of the Tender. Please ensure removal of company identification or logos from the external packaging. The Tender return is also to be submitted via AWARD as detailed at Appendix 1 to Section E (AWARD is an on-line system accessible via the internet). All parts of the Tender return must be received by AWARD and the

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Tender Board by the aforementioned date and time.

6. Please note that the facility for clarification questions via the AWARD on-line system will be available 48 hours after Tender publication.

7. Please confirm receipt of this Invitation to Negotiate to Bryony Camp, Defcomrlcc-navy27@mod.uk.

Yours faithfully

Thomas O’Gorman
Def Comrcl CC-Navy Hd

**List of Suppliers Invited to Submit a Tender for
ITN No. FLEET/00428**

Supplier Name	Supplier Address and Phone No	Supplier Point of Contact
Amey Community Ltd	The Sherard Building Edmund Halley Road Oxford OX4 4DQ Defence.Development@amey.co.uk 07801 988895	Jo Peck
Babcock Flagship Ltd	33 Wigmore Street London W1U 1QX David.Rose3@babcockinternational.com 07710 964588 07951 769832	David Rose
Thales UK Ltd	2 Dashwood Lang Road The Bourne Business Park Addlestone Nr. Weybridge Surrey KT15 2NX kevin.butcher@uk.thalesgroup.com 01963 372785	Kevin Butcher

Invitation to Negotiate
for the
Provision of Outsourced Training Services
FLEET/00428

Contents

This invitation consists of the following documentation:

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 - Enclosure 10 – Pricing Model (Excluding ex Authority Term Redundancy)
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 - Enclosure 12 – POTS Negotiation Plan
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Section A. Introduction

DEFFORM 47 Definitions

- A.1. “The Authority” means the Secretary of State for Defence of the United Kingdom of Great Britain and Northern Ireland, (referred to in this document as "the Authority"), acting as part of the Crown.
- A.2. “Tenderer” means the economic operator or group of operators in the form of a consortium, including sub-contractors, which has been invited to submit a response to this Invitation to Negotiate. Where “you” is used this means an action on you the Tenderer.
- A.3. “Invitation to Negotiate” (ITN) refers to the first document that the Authority sends out to potential Tenderers that initiates a tender response prior to negotiation.
- A.4. A “Tender” is the offer that you are making to the Authority.
- A.5. “Contractor Deliverables” means the works, goods and / or the services, including packaging (and Certificate(s) of Conformity supplied in accordance with any Quality Assurance (QA) requirements if specified) which the contractor is required to provide under the contract in accordance with the Schedule of Requirements, but excluding incidentals outside the Schedule of Requirements such as progress reports.
- A.6. The POTS draft contract, including the “Statement of Requirement” (Schedule 2) detailing the technical requirements and acceptance criteria of the Contractor Deliverables is attached to this DEFFORM 47.
- A.7. “Conditions of Tendering” means the conditions set out in the DEFFORM 47 that govern the competition.
- A.8. “Contract Conditions” means the attached conditions that will govern any resultant contract.
- A.9. A “Third Party” is any person who is not an employee of the Tenderer as defined at A2.
- A.10. “Initial Tender” is the submitted Tender as a response to this DEFFORM 47.
- A.11. “Final Tender” is the submitted Tender as a result of the negotiations as indicated in Section B – Key Tendering Activities.
- A.12. “Education and Training Services” for the Royal Navy forms the basis of the POTS Requirement as referred to in the original OJEU advert (OJ/S EU Reference 24620-2016) Defence Contracts Bulletin including online publication dated 21 January 2016.

Purpose

- A.13. The purpose of this ITN is to invite you to propose a solution / best price to meet the Authority’s requirement. This documentation explains and sets out the:
- A.13.1. tender process and timetable for the next stages of the procurement;
 - A.13.2. instructions and conditions that govern this competition;
 - A.13.3. information you must include in your Tender and the required format;
 - A.13.4. administrative arrangements for the receipt and evaluation of Tenders; and

- A.13.5. Contract Conditions that shall apply in the event that the Authority awards a contract following this competition.
- A.14. The sections in this ITN and associated documents are structured in line with a generic tendering process and do not indicate importance / precedence.
- A.15. This ITN has been issued to all potential Tenderers chosen during the supplier selection stage, listed on page 3 of this DEFFORM 47.
- A.16. The requirement was advertised by the Authority in the original OJEU advert (OJ/S EU Reference 24620-2016) Defence Contracts Bulletin including online publication dated 21 January 2016 with reference to the requirement in accordance with the Defence and Security Public Contracts Regulations 2011 Negotiated Procedure. The Provision of Outsourced Training Services requirement is detailed at Schedule 2 of the attached Terms and Conditions: it is primarily concerned with the delivery of Education and Training Services for the Royal Navy. Service delivery takes place in a number of shore training establishments largely within the Portsmouth and Plymouth areas. The service commencement date will be 1 January 2018.

ITN Documentation and ITN Material

- A.17. ITN Documentation means any information in any medium or form (for example drawings, handbooks, manuals, instructions, specifications and notes of pre-tender clarification meetings), issued to you, or to which you have been granted access, by the Authority for the purposes of responding to this ITN. ITN Material means any other material (including patterns and samples), equipment or software issued to you, or to which you have been granted access, by the Authority for the purposes of responding to this ITN. ITN Documentation, ITN Material and any intellectual property rights (IPR) in them shall remain the property of the Authority or other Third Party owners and is released solely for the purposes of enabling you to submit a Tender. You must:
- A.17.1. take responsibility for the safe custody of the ITN Documentation and ITN Material and for all loss and damage sustained to it while in your care;
- A.17.2. not copy or disclose the ITN Documentation or any part of it to anyone other than the bid team involved in preparing your Tender, and not use it except for the purpose of responding to this ITN;
- A.17.3. seek written approval from the Authority if you need to provide access to any ITN Documentation or ITN Material to any Third Party;
- A.17.4. abide by any reasonable conditions imposed by the Authority in giving its approval under sub-paragraph A.17.3, which at a minimum will require you to ensure any disclosure to a Third Party is made by you in confidence. Alternatively, due to IPR issues for example, the disclosure may be made, in confidence, directly by the Authority;
- A.17.5. accept that any further disclosure of ITN Documentation, or further use of ITN Documentation or ITN Material, without the Authority's written approval may make you liable for a claim for breach of confidence and / or infringement of IPR, a remedy which may involve a claim for compensation;
- A.17.6. inform the POTS Commercial Team if you decide not to submit a Tender;
- A.17.7. immediately return all ITN documentation, ITN Material and derived information of an unmarked nature, should you decide not to respond to this ITN, or you are notified by the Authority that your Tender has been unsuccessful; and
- A.17.8. consult the named POTS Commercial Officer to agree the appropriate

destruction process if you are in receipt of ITN Documentation and ITN Material marked 'OFFICIAL-SENSITIVE' or 'SECRET'.

- A.18. Some or all of the ITN Documentation and ITN Material may be subject to one or more confidentiality agreements made between you and either the Authority or a Third Party, for example a confidentiality agreement established in the form of DEFFORM 94. The obligations contained in any such agreement will be in addition to, and not derogate from, your obligations under paragraph A.13 above.

Tender Expenses

- A.19. You will bear all costs associated with preparing and submitting your Tender. If the Tender process is terminated or amended by the Authority, the Authority will not reimburse you.

Material Change of Control from Supplier Selection

- A.20. You must inform the Authority in writing if there is any material change in control, composition or membership of your organisation and / or consortium members, including any sub-contractors at any time during the procurement process. This may affect your right to stay in the competition.

Contract Conditions

- A.21. The full text of Defence Conditions (DEFCONs) and Defence Forms (DEFFORMS) are available electronically via <https://www.gov.uk/acquisition-operating-framework>.

Note: The MOD is changing to an electronic end to end procurement system (CP&F). Any conditions relating to the payment process may be amended between the issue of this ITN and contract award. Any change will solely be for the purpose of ensuring payment is made.

Other Information

- A.22. Please note the Tenderers' Visits referenced at Section B will take place from 07 to 10 November 2016 with the following agenda:
- A.22.1. Monday 7th November - 09:00 to 16:30 Portsmouth Area - HMS Collingwood
 - A.22.2. Tuesday 8th November - 08:30 to 13:00 Portsmouth Area - Defence Diving School & Fire Fighting Training Unit
 - A.22.3. Wednesday 9th November - 13:00 to 16:30 West Country - Britannia Royal Naval College
 - A.22.4. Thursday 10th November - 09:00 to 13:30 West Country - HMS Raleigh

All Tenderers have acknowledged their intention to attend the above along with the list of named attendees.

Negotiation Plan

- A.23. The Negotiations will take place in HM Naval Base Portsmouth. Refer to Enclosure 12 for the Negotiation Plan which will be comprised of a series of meetings with each Tenderer to discuss the following:
- A.23.1. Topics to be negotiated, but not limited to:
 - A.23.1.1. Training Optimisation
 - A.23.1.2. Training Delivery
 - A.23.1.3. Training Design
 - A.23.1.4. TUPE
 - A.23.1.5. Commercial / Legal issues
 - A.23.1.6. Financial, based on the Pricing Models
 - A.23.2. Dates and times for the topics listed (in A23) are set out in Enclosure 12. The process is designed to offer all Tenderers equal contact time with the Authority and to cover all the stated topics to a sufficient level of detail.
 - A.23.3. During the Negotiation sessions, Tenderers will need to ensure they have the appropriate people present to a maximum of five (5) at each session. Tenderers should advise the Authority's contact point (Bryony Camp) if they require laptop connectivity, projector and screen facilities at the meetings. It is anticipated that a maximum of five (5) Authority representatives (one of whom will be a note taker for the Authority) will attend each meeting. Each party should make its own notes of Negotiation meetings. The Authority will not be issuing notes of the meetings; however any direct questions of fact will be published through the Clarification Question system via the AWARD website.
 - A.23.4. Material identified by the Tenderers as 'Official-Sensitive Commercial' (OSC) will be treated as such, save in such cases where the Authority does not consider the information to be commercially sensitive. In such cases Tenderers will be given the opportunity to withdraw such information, or agree to its circulation to the other Tenderers. Tenderer's should note that the Authority has obligations under the Freedom of Information Act (FOIA) and that throughout the procurement and performance of the contract, notwithstanding documents being marked as 'OSC', those documents may still be released under FOIA.
 - A.23.5. The Authority will seek to ensure that Tenderers have a clear understanding of the Authority's requirements prior to completion of the Negotiation phase and the issue of an Invitation to Submit a Final Tender.

Section B. Key Tendering Activities

B.1. The key dates for this procurement are currently anticipated to be as follows:

Stage	Date and Time	Initiated By	Submit to:
Tenderers Conference (to include site visits) ¹	07 to 10 November 2016	The Authority	All Tenderers
Date for Confirmation of attendance at Tenderer's Conference ¹	28 October 2016	Tenderers	Navytrghq-ctspotsmailbox@mod.uk
Final date for Clarification Questions / Requests for additional information	17:00 on 09 January 2017	Tenderers	Defcomrclcc-navytl1@mod.uk
Final Date for Requests for Extension ²	17:00 on 16 December 2016	Tenderers	Defcomrclcc-navytl1@mod.uk
The Authority issues Final Clarification Answers	13 January 2017	The Authority	All Tenderers ³
Initial Tender Return	13:00 on 30 January 2017	Tenderers	The Tender Board, using DEFFORM 28
Initial Tender Evaluation	31 January 2017 to 10 March 2017	The Authority	N/A
Negotiations	13 March to 05 May 2017	The Authority	N/A
Invitation to Submit Final Tender	10 May 2017	The Authority	Defcomrclcc-navytl1@mod.uk
Final Tender Return	17:00 on 22 May 2017	The Authority	The Tender Board, using DEFFORM 28
Final Tender Evaluation	23 May 2017 to 12 June 2017	The Authority	N/A
Main Gate Business Case	13 June 2017 to 15 September 2017	The Authority	N/A
Winning Tender Announcement	19 September 2017	The Authority	All Tenderers
Standstill Period	19 September 2017 to 23:59 29 September 2017	The Authority	N/A
Contract Award	02 October 2017	The Authority	Public Announcement via the DCO
Service Commencement Date	01 January 2018	The Authority	N/A

Notes

1. A Tenderer's Conference is where the Authority presents the requirement to all Tenderers at the same time. A copy of the presentation will be issued to all Tenderers regardless of attendance. It gives you an opportunity to ask questions about the requirement. The Tenderer must provide the name(s) of those attending the Tenderer's Conference to the above named contact, by the date shown, so that access to the site can be arranged.
2. The Tenderer must make requests for an extension in writing (email is sufficient) to the above named contact, by the date and time shown. Any extension is at the sole discretion of the Authority and if granted will be granted to all Tenderers.
3. The Authority will automatically copy questions and answers to all Tenderers, removing the names of those who have raised the questions. If you do not want your question disclosed you must inform the Authority of this and the reason why when submitting the question. The Authority may choose to discuss with you whether it is appropriate to disclose the question or response, or both, to other Tenderers. If the Authority decides to disclose, you will be given the opportunity to withdraw your question. Where a question reveals a piece of information that could significantly impact the Tenderers responses this may result in an extension of the Tender return date. The Authority will endeavour to ensure that you have at least 10 working days to submit your Tender.

Section C. Instructions on Preparing Tenders

Tenders for Selected Contractor Deliverables

- C.1. You must Tender for all the Contractor Deliverables listed in the attached Schedule of Requirements. The Authority reserves the right to reject your Tender where you have not tendered for all of the Contractor Deliverables.

Construction of Tenders

- C.2. Your Tender must be written in English, using Arial font size 11. Prices must be in £GBP based on Firm Price supported by submission of the completed Pricing Model Spreadsheet at Appendix 3 to Section D, Enclosure 2.
- C.3. To assist the Authority's evaluation please set out your Tender response in accordance with Section D (Tender Evaluation).

Validity

- C.4. In accordance with F3 your Final Tender must be valid / open for acceptance for 300 calendar days from the Initial Tender return date. If successful, your Tender must be open for acceptance for a further thirty (30) calendar days.
- C.5. Any Tender made subject to additional or alternative Contract Conditions alone is not a variant bid. Where the tender evaluation has a pass / fail for the Contract Conditions the Authority may reject the Tender on the grounds of such additional or alternative Contract Conditions.
- C.6. The Authority cannot evaluate any Variant Bids during this competition.

Section D. Tender Evaluation

Objective

- D.1. The overall objective of the tender evaluation is to select from the pre-qualified Tenderers the most economically advantageous tender (MEAT) for the Authority. MEAT will be assessed on a relative value for money basis (RVfM), described at Appendix 4 to Section D to this DEFFORM 47.

Maintaining Confidentiality

- D.2. All information provided by the Tenderers will be appropriately safeguarded and will only be available to the minimum number of the Authority's personnel necessary to undertake the evaluation.
- D.3. All personnel undertaking or supporting evaluation have signed a confidentiality agreement, copies of which shall be held by the POTS Project Team.

Evaluation Approach

- D.4. In accordance with the advert (OJ/S EU reference 24620-2016 (2016-01-23)) the Tenderers' responses to the ITN will be evaluated and awarded in terms of the criteria stated in the specifications and this ITN.
- D.5. To avoid fruitless evaluation of unaffordable Tenders, the Authority has set out Affordability Thresholds which reflect the limit of potential for a negotiated priced reduction. Accordingly Initial Tenders must not exceed a total value of £350M GBP ex VAT and Final Tenders must not exceed a threshold of £330M GBP ex VAT. At the conclusion of the evaluation of the initial tenders, each Tenderer shall be provided with a written response as to the outcome of the evaluation. The response will cover the following areas:
- D.5.1. Confirmation that Initial Tender has passed Commercial Compliance
 - D.5.2. Comments on the Technical Evaluation of each ROR including areas for improvement
 - D.5.3. Confirmation of the position of the Tenderer's offer on the Relative VFM graph
- D.6. The Authority will undertake the evaluation of all Tenders received by the date and time specified in Section B. The Authority will evaluate the Initial Tenders in accordance with the process set out in D.7.1 and the Final Tenders in accordance with the process set out in D7.2.

Tender Evaluation details

- D.7. There will be two Tender and evaluation phases; an Initial Tender submitted in accordance with this ITN and a Final Tender submitted post negotiation in accordance with a separate Invitation to Submit Final Tender (ITSFT).
- D.7.1. Initial Tender Evaluation. The Authority will use the AWARD evaluation tool for the evaluation of the Commercial, Technical and Financial elements of the Initial Tender. Financial evaluation will be in accordance with Appendix 3 to this Section D and in line with instructions at Section E via tender board submission. It is the Authority's intention to evaluate all Tenderers' responses as follows:
- D.7.1.1. Affordability Threshold: If the Initial Tender exceeds the affordability threshold of £350m GBP (ex Vat) this will result in a non-compliant assessment and the Tender taken no further in the process.
 - D.7.1.2. Commercial Compliance: This will be conducted in accordance with Appendix 1 to this Section D. This will result in a compliant / non-

- compliant assessment.
- D.7.1.3. Technical Evaluation: This will be conducted in accordance with Appendix 2 to this Section D.
- D.7.1.4. Financial Evaluation: The Authority will evaluate Firm prices of Tenderer's responses in accordance with Appendix 3 to this Section D.
- D.7.2. Final Tender Evaluation. Post Negotiation the Authority will use the AWARD evaluation tool for the evaluation of the Affordability Thresholds, Commercial, Technical and Financial elements of the Final Tender. For any Tender that is non-compliant at any of the following stages the Tenderer will be excluded from the competition. It is the Authority's intention to evaluate all Final Tenderers' responses as follows:
- D.7.2.1. Affordability Threshold: If the Final Tenders exceed the affordability threshold of £330m GBP (ex Vat), this will result in a non-compliant assessment.
- D.7.2.2. Commercial Compliance: This will be conducted in accordance with Appendix 1 to this Section D.
- D.7.2.3. Technical Evaluation: This will be conducted in accordance with Appendix 2 to this Section D.
- D.7.2.4. Financial Evaluation: The Authority will evaluate Firm prices of Tenderers' responses in accordance with Appendix 3 to this Section D.

Full details of the submission required under the ITSFT will be provided in the Invitation to Submit Final Tender (ITSFT) that will be issued at the conclusion of the negotiation phase, to all Tenderers who successfully complete the Initial Tender evaluation, and complete Negotiations. A draft ITSFT will be issued at the commencement of negotiations containing the full evaluation process, Evaluation criteria and requirements of response. This document will then be formally issued at ITSFT.

- D.8. The 'Winning Tender' will be selected based on MEAT basis as defined in Appendix 4 to Annex D following the Authority's evaluation of the Final Tenders.

Tenderer Supplied Information

General

- D.9. All Tenderers shall prepare and submit Tenders, in accordance with Section E (Instructions on Submitting Tenders) of this DEFFORM 47 in hard copy, 2 CD's (1 priced and 1 un-priced) and input into the AWARD online tool. The AWARD template will provide separated sections for the Affordability Threshold, Commercial Compliance, Technical and Financial Evaluations.

For the Commercial part of the Tender the Tenderer will provide a completed response to the Commercial Compliance Matrix at Appendix 1 to this Section D. This will include the response submitted on AWARD.

- D.10. Each Management Plan submitted by the Tenderer in response to the RoR's (Enclosure 1 to Appendix 2 to Section D) shall provide full details of the Tenderers' solutions/methodology and should not merely provide, or support, responses to the related evaluation criteria.

Schedules

- D.11. This ITN is accompanied by the Authority's Draft Contract entitled 'Provision of Outsourced Training Services to Navy Command FLEET/00428' as indicated at Enclosure 9 of this DEFFORM 47 comprising:
- D.11.1. Clauses 1 to 106
 - D.11.2. Schedules 1 to 26
- D.12. The Authority has drafted the following Schedules, the Tenderer is required to either confirm its acceptance of these Schedules or provide a marked up version for negotiation. Such mark ups must not be amended to the extent that the original intent or tone of the Schedule is materially changed. The Authority's evaluation in terms of Commercial compliance of the Tenderer's submissions will not, in isolation, impact on the Tenderer's qualification to proceed to Negotiation
- D.12.1.1. Schedule 6 (Pricing Mechanism)
 - D.12.1.2. Schedule 7 (Pricing of Change)
The Authority will require the Tenderer to complete and submit for evaluation:
 - D.12.1.3. Schedule 14 (Training Services Management Plan)
 - D.12.1.4. Schedule 11 (Key Personnel) is required for Technical Compliance. The Tenderer will be assessed by the completed Schedule 11 and the names and relevant CV's of Suitably Qualified and Experienced Personnel (SQEP) as required within the relevant RoR's. The Authority's evaluation of the Tenderer's completed Schedule 11 will not, in isolation, impact on the Tender's qualification to proceed to Negotiation.
 - D.12.1.5. The format of the Annual Financial Report (Annex B to Schedule 8 (Financial Reports)) will be evaluated for Commercial compliance by considering the Tenderer's submitted Annual Financial Report with Schedule 8, 3.1.3 and 4.1.2 for completeness. The Authority's evaluation of the Tenderer's Annex B to Schedule 8 will not, in isolation, impact on the Tender's qualification to proceed to Negotiation.
 - D.12.1.6. The format of the Annual Price Change Mechanism (Annex A to Schedule 7 (Future Pricing and Pricing of Change)) using Table 1 Thresholds and will be evaluated for Commercial compliance by the Tenderer's submitted Annual Change Pricing Mechanism with Schedule 7, for completeness. The Authority's evaluation of the Tenderer's Annex A to Schedule 7 will not, in isolation, impact on the Tender's qualification to proceed to Negotiation.
 - D.12.1.7. In reference to any of the Tenderers' proposed changes at D.13.1.1 to D.13.1.6, these will be evaluated for Technical and Commercial compliance. The Tenderer shall limit the scope to the subject matter of these aforementioned Schedules and Annexes and shall not in any way seek to alter (whether directly or indirectly) the form, purpose or effect of any of the Terms and Conditions of the Contract or any other provision (including any provision outside the relevant Schedule) of the Contract or otherwise alter the balance of Commercial Risk between the parties in any such Term and Condition or other contract provision.

Submission of Prices

- D.13. The Tenderer is to submit Firm and Fixed prices in the format requested in the Pricing Model at POTS Additional Information, Enclosures 10 and 11 in accordance with D3.2 at Appendix 3 of Section D. The Firm Price entered on the Tender Submission Document (Offer) DEFFORM 47, Annex A shall be the total Contract Price for the stated requirement in £GBP (exc VAT), including additional services and the options (D3.1.2 and F23) subject to Negotiation and Final Offer.
- D.14. All costs associated with the Management Fees are deemed to be included in the Contract Price.
- D.15. Firm and Fixed prices shall be quoted in £GBP and be exclusive of VAT.

Technical Scope of the Contract (Schedule 2 Statement of Requirements)

- D.16. The scope is limited to the following UK shore based training functions:
- D.16.1. Training Delivery Service (Type C) Contractor Managed and Delivered
 - D.16.2. Training Delivery Support Service (Type B) Authority Managed but delivered by both Contractor and Military training deliverers
 - D.16.3. Training Support Service including:
 - D.16.3.1. Training Design and Upkeep Service
 - D.16.3.2. Quality Assurance Service
 - D.16.3.3. Training Planning Service
 - D.16.3.4. Training Facilitation Service
 - D.16.3.5. International Defence Training and Non-RN Training Facilitation Service
 - D.16.4. Training Equipment Availability Service including:
 - D.16.4.1. Management and Maintenance of Training GFA
 - D.16.4.2. Training Equipment Project Management Service
 - D.16.5. Business Information Service
 - D.16.6. Education Service including:
 - D.16.6.1. Education Lifelong Learning and Resettlement Service
 - D.16.6.2. Naval Service Apprenticeship Programme delivery
 - D.16.6.3. Accreditation Service
 - D.16.7. Optimisation of Training
 - D.16.8. Fast Inshore Attack Craft provision
 - D.16.9. Support to Reserves Training
 - D.16.10. Support to ISTU Training

- D.16.11. DMLS services (until DMLS move circa 2018/19)
- D.16.12. Administration support to the SETT (until SETT move circa 2018/19)
- D.16.13. Optional inclusion of Fire Fighting Training Services (FFTS) from 01/02/2021

Tenderers should note that the Fire Fighting Training Services (FFTS) ((SOR) Schedule 2 Annex L) will be addressed as an option within POTS for start date 01 February 2021 and consequently will require a separate take up option Fixed price as part of the initial tender.

Initial Transition Change Mechanism

- D.17. The baseline for the Tenderer to bid against the POTS SOR is the 17/18 Statement of Training Task (SOTT) for the Fleet Outsourced Activities Programme (Training) (FOAP(T) FLEET/SP2/0006).
- D.18. The annual process by which the 18/19 Statement of Trained Requirement (SOTR) is converted into the Statement of Training Task (SOTT) will capture all Statement of Requirement (SOR) changes from the 17/18 SOTT that was used to baseline the SOR. Governance procedures will ensure that any uplift in resource required for these changes will have been adequately funded.
- D.19. The annual change cycle will capture all further changes (including the enduring requirements generated for Urgent Operational Training Requirements (UOTR)) after contract award and will be used as the routine change management tool. For consistency and continuity the FOAP(T) In Year Change mechanism will be retained to manage in-year changes until April 2019.
- D.20. Additional changes such as large scale non-equipment in-year changes will be managed by the Exceptional Change mechanism referred to Schedule 4 (Change and Change Management).
- D.21. DMLS (Annex O) is anticipated to be removed from the POTS Contract in Quarter 1 2019.
- D.22. SETT (Annex P) is anticipated to be removed from the POTS Contract between September 2018 and August 2019.
- D.23. The Royal Navy is currently developing a project to co-locate the Submarine Training in the Clyde Naval Base. The project, known as the Clyde Training Services (CTS) Project, will examine the relocation of elements of the Submarine Training during the life of this Contract. Any relocations or Break of Task in the POTS Contract associated with this project is unlikely to occur before 2020.

The 'Winning' Tenderer's Bid will be that which has been assessed as on or below the Affordability Threshold of £330m GBP (ex Vat), as commercially compliant and has the highest combined Technical and Financial score.

Appendix 1 to Section D to DEFFORM 47 – Commercial Evaluation

Commercial Evaluation

D1.1. The Commercial evaluation of the Tender will be undertaken to ensure:

- D1.1.1. The Tender contains the documents and deliverables as set out in the Commercial Compliance matrix at Enclosure 1 to Appendix 1 to Section D and is read and understood by the Tenderer's indication.
- D1.1.2. DEFFORM 47 at Annex A (Tender Submission Document (Offer) as indicated - subject to Negotiation). Tenderers must indicate that they have submitted this document signed and unaltered annotating compliant / non-compliant on a returned hard copy.
- D1.1.3. The Tenderer has submitted a marked up draft set of Terms & Conditions, which do not materially change the intent of each clause, or has confirmed that the Terms and Conditions are acceptable. Where Tenderers propose contract drafting as above, Tenderers are required to draft clauses in such a way that they fit into the construct of the Contract with minimal amendment. Tenderers must ensure that such drafting is written in unambiguous and enforceable terms ensuring all links to appropriate Contract Terms, Conditions and relevant Schedules are complete.

D1.2. Commercial evaluation of both the Initial and Final Tenders will not result in a weighted score, the evaluation will result in an overall compliant / non-compliant assessment. Any non-compliant tender at Initial Tender stage will be required to conform to the Commercial requirements at Final Tender stage and will be discussed during the negotiation phase. Any Commercially non-compliant Tenders at the Final Tender phase shall be excluded from the competition and the remainder of the Tender may not be assessed.

**Enclosure 1 to Appendix 1 to Section D to DEFFORM 47 –
Commercial Compliance Matrix**

Section & Paragraph Nos	COMMERCIAL EVALUATION	Status	
Section A – Introduction		Compliant/ Non-Compliant	Tenderer's Comments
A1-A12	DEFFORM 47 Definitions		
A13-A16	Purpose		
A17-A18	ITN Documentation and ITN Material		
A19	Tender Expenses		
A20	Material Change of Control from Supplier Selection		
A21	Contract Conditions		
A22	Other Information		
A23	Negotiation Plan		
Section B - Key Tendering Activities			
B1	Key Tendering Activities and Notes		
Section C – Instruction on Preparing Tenders			
C1	Tenders for Selected Contractor Deliverables		
C2-C3	Construction of Tenders		
C4-C6	Validity / Variant Bids		

Section E – Instructions on Submitting Tenders			
E1	Submission of Your Tender		
E2-E3	Part 1 - Submission to Award		
E4-E11	Part 2 – Submission to Tender Board		
E12	Samples (N/A)		
E13-E19	Clarification Questions		
Appendix 1 to Section E – Award Submission Instructions			
E1.1	Introduction		
E1.2-E1.6	Getting Started		
E1.7-E1.8	Tender Clarification Questions		
E1.9	Authority Notifications		
E1.10	Authority Clarification Questions		
E1.11	Alerts		
E1.12	Criteria		
E1.13	Files		
E1.14	Technical		
E1.15	Award Process Overview		
Section F – Condition of Tendering			
F1-F3	Condition of Tendering		
F4-F5	Confirming to the Law		
F6	Bid Rigging and Other Illegal Practices		
F7-F8	Conflicts of Interest		
F9	Government Furnished Asset		

F10	Standstill Period		
F11-F13	Publicity Announcement		
F14-F15	Sensitive Information		
F16	Remedies for Breach of Contract		
F17-F19	Reportable Requirements		
F20	TUPE		
F21	Intellectual Property Rights – Confidentiality and Technical Assistance		
F22	Security Aspects Letter (SAL)		
F23	Options		
F24	Parent Company / Bank Guarantee		
F25	Sustainable Development		

Annex A - DEFFORM 47			
<p><i>Tenderers that they have signed an unaltered Tender Submission Document (Offer) by annotating ‘Compliant’ or ‘Non-Compliant’ both in AWARD and on a returned hard copy of this Commercial Compliance Matrix where ‘Compliant’ means, in the case of this part of the Commercial Compliance Matrix only, that the Tenderer has provided a hard copy of the Tender Submission Document (Offer) which is both signed and unaltered and Non-Compliant’ means that the Tenderer has either not provided a hard copy of the Tender Submission Document (Offer) or is unsigned or altered.</i></p>			
	Tender Submission Document (Offer) – Subject to Completion of Negotiation		

Appendix 1 to Annex A (Offer) DEFFORM 47

Tenderers must indicate that they have read and understood the following sections of this ITT by annotating “Compliant” or “Non-Compliant” both in AWARD and on a returned hard copy of this Commercial Compliance Matrix, where ‘compliant’ means, in the case of this part of the Commercial Compliance Matrix only, that the Tenderers understand and agree to the terms of the relevant section and ‘non-compliant’ means that the Tenderers do not understand and/or do not agree to the terms of the relevant section together with the location/title of any supporting document in the comments box. Where the Authority has included specific instructions, these will be indicated in italics under the section header.

	Information on mandatory Declarations		
1	Part Tender		
2	Minimum Order Quantities (N/A)		
3-6	Notification of Invention etc.		
7-13	Notification of Foreign Exports Control Restrictions		
14-15	Overseas Expenditure		
16-18	Import Duty		
19	Sub-Contracts Form 1686		
20-23	Small and Medium Enterprises		
24-27	Transparency, Freedom of Information and Environmental Information Regulations		
28	Electronic Purchasing		
29	Change of circumstances		
30	Asbestos, hazardous items and depletion of Ozone Layer		
31	Military Aviation Authority (MAA) Requirements		
32	Bank or Parent Company Guarantee		
33	Cyber Essentials Accreditation		
35-39	The Armed Forces Covenant		

ITN Enclosures			
<i>Tenderers shall indicate that they have completed and provided the following documents referred to in this ITN by annotating 'Compliant' or 'Non-Compliant' both in AWARD and on the returned hard copies of this Commercial Compliance Matrix, 'compliant' means, in the case of this part of the Commercial Compliance Matrix only, that the Tenderers have completed and provided the following documents and 'non-compliant' means that they have not completed or provided the relevant documents</i>			
Enclosure 2	Confidentiality Agreement (DEFFORM 94) agreement		
Enclosure 3	Security Aspects Letter		
Enclosure 4	TUPE		
Enclosure 5	Tenderers Commercially Sensitive Information (DEFFORM 539A) Schedule 21		
Enclosure 6	Employees Confidentiality Agreement (DEFFORM 702)		
Enclosure 7	Electronic Transactions Agreement (DEFFORM 30)		
Enclosure 8	Tenderers' Insurance Requirements Response Table		
Enclosure 9	POTS Contract Terms & Conditions		
	Schedule 1 Definitions and Interpretation		
	Schedule 2 Statement of Requirements		
	Schedule 3 Governance and Contract Management		
	Schedule 4 Change and Change Management		
	Schedule 5 Transition		
	Schedule 6 Firm Pricing Mechanism		
	Schedule 7 Future Pricing and Pricing of Change		
	Schedule 8 Financial Reports		
	Schedule 9 Payment Mechanism		
	Schedule 10 Options to Extend		
	Schedule 11 Key Personnel		

	Schedule 12 Performance Mechanism		
	Schedule 13 Authority Audit		
	Schedule 14 Training Services Management Plan		
	Schedule 15 Business Continuity Plan		
	Schedule 16 TUPE		
	Schedule 17 Required Insurances		
	Schedule 18 Quality Plan		
	Schedule 19 Deed of Indemnity Given by a Parent Company in Respect of a Subsidiary		
	Schedule 20 DEFFORM 68 (Hazardous Substances)		
	Schedule 21 Deform 539A (Sensitive Information)		
	Schedule 22 DEFCON 694 (Accounting for Property of the Authority)		
	Schedule 23 DEFFORM 111 (Adresses & Contacts)		
	Schedule 24 DEFFORM 10b (Amendment Acceptance)		
	Schedule 25 Security Clearance		
	Schedule 26 DIO Licence to Occupy		
	Schedule 27 DEFFORM 532		
Enclosure 10	Pricing Model – EXCLUDING Ex Authority Term Redundancy		
Enclosure 11	Pricing Model – INCLUDING Ex Authority Term Redundancy		
Enclosure 12	Negotiation Plan		
Enclosure 13	TUPE Data as at 31 March 2016		

Appendix 2 to Section D to DEFFORM 47 – Technical Evaluation

Technical Evaluation

Tenderers will be required to state: ‘what’ the proposed solution is to the required activity; and ‘how’ they will implement the solution. This will enable the Authority’s evaluators to test the Tenderer’s understanding of the requirement, providing assurance that they are competent to deliver the required contractual output services. The ‘how’ will enable the Authority’s Technical evaluators to assess the level of Tenderer’s competency.

- D2.1. The Technical Evaluation will be conducted by testing the following aspects of the Technical Tender:
- D2.1.1. Capability: This will examine the credibility of the Tender in response to the requirement and assess understanding of requirements, capacity, flexibility, implementation and Quality Assurance.
 - D2.1.2. Integration: This will examine the extent to which the Tenderers’ proposals for delivery of the requirements will integrate with the Training Optimisation to form a robust Training Service for the Royal Navy. It will also examine the extent to which plans integrate with the required delivery output.
 - D2.1.3. Confidence: The Authority’s confidence levels will be judged against the capability and integrity but also by consideration of the consistency between Training Services Management Plans and ROR responses, consistent and realistic risk identification and mitigation as well as the individual factors listed in the RORs. ROR responses should therefore, where appropriate, refer to relevant sections of the plans (on Award these should be hyperlinked to the relevant section).

Evaluation Methodology

The Requirements of Responses (RoRs) will be evaluated as follows:

- D2.2. Mandatory Statements will be assessed as a Pass or Unacceptable. If any of the Mandatory Statements are evaluated as Unacceptable, this specific RoR will be scored “Unacceptable”.
- D2.3. If the Mandatory Statements are all assessed as Pass then the evaluators will proceed to evaluate the Key Statements. Each Key Statement will be assessed as either; Very High Confidence, High Confidence, Good Confidence, Acceptable or Unacceptable. The overall evaluation score of the Key Statements within a specific RoR will be the lowest score attained in this Key Statements section. (e.g. 3 Key Statements; 1 is Unacceptable and 2 are Good Confidence, this will result in the RoR evaluated as Unacceptable).
- D2.4. The Authority’s Technical Evaluation Team will be comprised of the relevant Subject Matter Experts from within Royal Naval Training Management as well as experts in specific areas including Training Optimisation and Quality Assurance. This team will review the tender evidence and evaluate it against the requirements set out in the ITN and the Assessment Criteria at Enclosure 1 to this Appendix 2 to Section D.
- D2.5. Each of the Authority Technical evaluators will assess the Tender individually using the scoring guidance for each question in order to award the appropriate mark. One evaluator for each ROR will be the lead evaluator and will produce a single mark for that ROR taking

into consideration the marks of the rest of this specific RoR Team (who are to be determined) which will be considered by the Moderator (see D2.7).

- D2.6. The Authority reserves the right to request clarification from the Tenderer as to the location of the required evidence in their Tender. The Tenderer is to ensure they have sufficient resources in place in order to respond quickly to any clarifications requested by the Authority in order to avoid undue delay in the evaluation process.
- D2.7. Moderation of the technical evaluation will be undertaken once the individual Subject Matter Experts' evaluations are complete and the lead evaluators for each RoR have produced their scores. The Authority technical Moderator will be a senior Royal Navy representative, Captain Andy Green. The Moderator's marks will be the final technical Authority marks. The marks for RORs that are not pass/fail will be converted to scores using the following table:

Mark	Score
Very High Confidence	100%
High Confidence	70%
Good Confidence	40%
Acceptable	0%
Unacceptable	Fail

Guidance for Tenderers

- D2.8. The Authority moderated scores are inserted into a pre-set formula to derive an overall score based on the formula: Weighting x Score, per Requirement of Response (RoR). Weightings are shown against each RoR at D2.8: scores are shown at D2.5. Figure 2 provides an example of how the scoring system will produce a ranked order of best Technical Score.
- D2.9. Instructions for submission of Tenders to AWARD are attached at Appendix 1 to Section E.

D2.10. Listing of the Requirements of Responses (RoRs) including their relative weighting and the relevant Pass/Fail:

Relative Weighting RoR's:

Area	RoR Number	Criterion	Weighting	Rank
Delivery & Optimisation	07	Training Optimisation Service	11.71%	1
Management	02	HR and TUPE	7.80%	2
Management	06	Change and Change Management	7.39%	3
Delivery & Optimisation	09	Training Delivery Support Service (Type B)	7.39%	3
Delivery & Optimisation	08	Training Service Delivery (Type C)	7.39%	3
Support	15	Training Equipment Availability Service	7.39%	3
Support	10	Training Design Service	6.98%	7
Support	11	Sub Contract Management	6.98%	7
Support	13	Training Planning Service	6.98%	7
Management	01	Transition	6.16%	10
Support	12	Training Quality Assurance Service	6.16%	10
Management	03	Governance & Performance Management	4.93%	12
Support	14	Training Facilitation Service	4.52%	13
Management	16	Business Information Services	4.11%	14
EL3R	17	Education Services	4.11%	14

Pass/Fail RoRs:

Area	RoR Number	Criterion
Management	04	Contract Quality Management System
Management	05	Security

The weight of the criteria groups are as follows:

Criteria Area	Weight
Delivery & Optimisation	26.49%
Management	30.39%
Support	39.01%
EL3R	4.11%

Enclosure 1 to Appendix 2 to Section D to DEFFORM 47 - POTS Technical Criteria

Requirement of Responses (RoRs)

D2.11

RoR: 01

Transition

Aim

1. To select a solution that will deliver transition services for implementation and exit.

Background

2. This RoR covers the requirement of the Tenderer to implement delivery of the Training Services at the Service Commencement Date and the Tenderer's exit from this Contract on the earlier of the Expiry Date or the Termination Date.

3. The requirement for this area is defined in:

- 3.1. Schedule 3 (Governance and Contract Management)
- 3.2. Schedule 5 (Transition)
- 3.3. Schedule 11 (Key Personnel)
- 3.4. Schedule 12 (Performance Mechanism)
- 3.5. Schedule 13 (Authority Audit)

Responses Required:

4. The Tenderer will provide details of its Key Personnel for Schedule 11 including:
 - 4.1. how the Key Personnel will be employed in delivering and managing implementation in accordance with Schedule 5 and clause 15;
 - 4.2. the SQEP details of its Key Personnel; and
 - 4.3. a description of how the Key Personnel fit into the organogram provided in Schedule 11.
5. The Tenderer will provide an Implementation Plan for Annex A to Schedule 5, detailing the work required for the Tenderer to deliver the Training Services from the Service Commencement Date in accordance with clauses 3.6, 4.4 and 15.1, and Schedule 5 including:
 - 5.1. How the Tenderer will manage the review of the Implementation Plan and Programme by the Implementation Working Group in accordance with part 2 of Schedule 3;
6. The Tenderer will provide a Training Services Management Plan for part 2 of Schedule 14 (Implementation) detailing how the Tenderer will deliver and manage the implementation of this Contract that includes the following:
 - 6.1. How the Tenderer will produce and manage a programme of activities derived from the Implementation Plan in accordance with clause 15.1;
 - 6.2. How the Tenderer will identify and manage risks to delivery of the Training Services on the Service Commencement Date;

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6.3. How the Tenderer will agree the KPIs produced in RoR 3 (Governance and Performance Management) in accordance with Part 3 of Schedule 12;

6.4. How the Tenderer will deliver a series of communications to ensure that all stakeholders are informed in advance of changes that could affect them in accordance with clause 15.4;

6.5. How the Tenderer will work with the Authority to populate the Authority Contract Handbook in accordance with clause 15.5;

6.6. How the Tenderer will interface with the TUPE obligations in Schedule 16 (TUPE); noting that this response should focus on integration with the response to RoR 2 (HR and TUPE) and not the delivery of TUPE obligations;

7. The Tenderer will provide a Training Services Management Plan for part 14 of Schedule 14 (Exit) detailing how the Tenderer will deliver and manage the exit from this Contract that includes the following:

7.1.1. How the Tenderer will produce and subsequently manage the draft Exit Plan in accordance with clause 73.1 and 73.2.

7.1.2. How the Tenderer will produce and manage a programme of activities derived from the Exit Plan including the obligations set out in clause 73;

7.1.3. How the Tenderer will provide support to the Follow-On Contractor or the Authority in accordance with clause 73.45;

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1.1. The Tenderer's solution will deliver continued compliance with all standards and address all constraints.</p> <p>1.2. The Tenderer's solution identifies Key Personnel to deliver the transition services for Schedule 11 (Key Personnel).</p> <p>1.3. The Tenderer's solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism).</p>	In the Authority's opinion all of the statements on the left are true				x
2	<p>KEY STATEMENTS</p> <p>2.1. The Tenderer has identified Key Personnel for the Implementation Working Group in accordance with Schedule 3;</p> <p>2.2. The Tenderer has identified Key Personnel for the Exit Steering Group in accordance with Schedule 3;</p> <p>2.3. The Tenderer's list of Key Personnel in Schedule 11 who will be delivering transition details how the Tenderer will:</p> <p>2.3.1. provide substantial management oversight and delivery of implementation and Exit activities to ensure that there is no break in the delivery of Training Services in this Contract;</p> <p>2.3.2. build relationships and work collaboratively with the Authority throughout the Implementation Phase and Exit Period to implement and exit from this Contract;</p> <p>2.3.3. continue to be employed in the area they had been implementing, from Service Commencement Date;</p> <p>2.3.4. provide comprehensive and practitioner level project management of the Implementation Phase and Exit Period;</p> <p>2.3.5. identify and understand the management of systems in complex environments so that implementation and exit can be delivered holistically rather than in discrete activities;</p> <p>2.3.6. ensure that the key personnel have a proven track record of managing multiple work stream activities in a complex environment.</p>	x				
	<p>2.4. The Tenderer has identified Key Personnel for the Implementation Working Group in accordance with Schedule 3;</p> <p>2.5. The Tenderer has identified Key Personnel for the Exit Steering Group in accordance with Schedule 3;</p> <p>2.6. The Tenderer's list of Key Personnel in Schedule 11 who will be delivering implementation and exit details how the Tenderer will:</p> <p>2.6.1. provide management oversight and delivery of implementation and exit activities to ensure that there is no break in the delivery of Training Services in this Contract;</p>		x			

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	<p>2.6.2. work collaboratively with the Authority throughout the Implementation Phase and Exit Period to implement and exit from this Contract;</p> <p>2.6.3. provide project management of the Implementation Phase and Exit Period;</p> <p>2.6.4. identify the management of systems in complex environments so that implementation and exit can be delivered holistically rather than in discrete activities;</p> <p>2.6.5. ensure that the Key Personnel have experience of managing multiple work stream activities in a complex environment.</p>					
	<p>2.7. The Tenderer has identified Key Personnel for the Implementation Working Group in accordance with Schedule 3;</p> <p>2.8. The Tenderer has identified Key Personnel for the Exit Steering Group in accordance with Schedule 3;</p> <p>2.9. The Tenderer's list of Key Personnel in Schedule 11 who will be delivering implementation and exit details how the Tenderer will:</p> <p>2.9.1. provide management oversight and delivery of implementation and exit activities to ensure that there is no break in the delivery of Training Services in this Contract;</p> <p>2.9.2. work collaboratively with the Authority throughout the Implementation Phase and Exit Period to implement this Contract;</p> <p>2.9.3. ensure that the Key Personnel have experience of managing activities in a complex environment.</p>			x		
	<p>2.10. The Tenderer has identified Key Personnel for the Implementation Working Group in accordance with Schedule 3;</p> <p>2.11. The Tenderer has identified Key Personnel for the Exit Steering Group in accordance with Schedule 3;</p> <p>2.12. The Tenderer's list of Key Personnel in Schedule 11 who will be delivering implementation and exit details how the Tenderer will provide management oversight and delivery of implementation and exit activities to ensure that there is no break in the delivery of Training Services in this Contract.</p>				x	
	2.13. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
3.	<p>3.1. The Tenderer's Implementation Plan identifies the work the Tenderer will undertake at each stage of the Implementation Phase in accordance with Schedule 5 and clause 15 by:</p> <p>3.1.1. clearly identifying key milestones that map to the requirements of clause 15;</p> <p>3.1.2. identifying how the Tenderer will provide a comprehensive method of monitoring and updating key milestones in accordance with Schedule 3;</p> <p>3.1.3. identifying how the Tenderer will ensure that the Key Personnel have the appropriate SQEP to manage or deliver the requirements of each key milestone;</p> <p>3.1.4. identifying how the Tenderer will ensure that the Implementation Plan will be continuously updated against the implementation activities;</p> <p>3.1.5. identifying how the Tenderer will provide a clear and easy to understand method of displaying the Implementation Plan to the Authority for visibility from the Effective Date;</p> <p>3.1.6. identifying how the Tenderer will report the information in the Implementation Plan to the Authority in accordance with Schedule 3.</p>	x				
	<p>3.2. The Tenderer's Implementation Plan identifies the work the Tenderer will undertake at each stage of the Implementation Phase in accordance with Schedule 5 and clause 15 by:</p> <p>3.2.1. identifying key milestones that map to the requirements of clause 15;</p>		x			

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	<p>3.2.2. identifying how the Tenderer will provide a method of monitoring and updating key milestones in accordance with Schedule 3;</p> <p>3.2.3. identifying how the Tenderer will ensure that the Key Personnel have the appropriate SQEP to manage or deliver the requirements of the Implementation Plan;</p> <p>3.2.4. identifying how the Tenderer will ensure that the Implementation Plan will be periodically updated against the implementation activities;</p> <p>3.2.5. identifying how the Tenderer will provide a method of displaying the Implementation Plan to the Authority for visibility from the Effective Date;</p> <p>3.2.6. identifying how the Tenderer will report the information in the Implementation Plan to the Authority in accordance with Schedule 3.</p>					
	<p>3.3. The Tenderer's Implementation Plan identifies the work the Tenderer will undertake at each stage of the Implementation Phase in accordance with Schedule 5 and clause 15 by:</p> <p>3.3.1. identifying key milestones that map to the requirements of clause 15;</p> <p>3.3.2. identifying how the Tenderer will ensure that the Implementation Plan will be updated against the implementation activities;</p> <p>3.3.3. identifying how the Tenderer will report the information in the Implementation Plan to the Authority in accordance with Schedule 3.</p>			x		
	<p>3.4. The Tenderer's Implementation Plan identifies the work the Tenderer will undertake at each stage of the Implementation Phase in accordance with Schedule 5 and clause 15.</p>				x	
	<p>3.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
4.	<p>4.1. The Tenderer's Training Services Management Plan details how the Tenderer will deliver and manage implementation of this Contract including:</p> <p>4.1.1. The production and management of an Implementation Programme by:</p> <p>4.1.1.1. detailing individual activities required to deliver the key milestones in the Implementation Plan;</p> <p>4.1.1.2. identifying the Key Personnel responsible for the activities against the list of Key Personnel in Schedule 11;</p> <p>4.1.1.3. providing an electronic Implementation Programme that can be accessed at all times by the Authority via the Business Information Service at Annex E to Schedule 2;</p> <p>4.1.1.4. continuously updating the information so that the Implementation Programme provides real time information whenever required;</p> <p>4.1.1.5. providing comprehensive information in the Implementation Programme to reflect decisions and actions taken against each activity against the Implementation Plan;</p> <p>4.1.2. The identification and management of risks to delivery of the Training Services on the SCD by:</p> <p>4.1.2.1. identifying risks to the delivery of implementation;</p> <p>4.1.2.2. identifying actions to mitigate the risks with personnel and activities allocated to each action in the Implementation Plan;</p> <p>4.1.3. The management of a process to agree the KPIs produced in RoR 3 in accordance with part 3 of Schedule 12 by:</p>	x				

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	<ul style="list-style-type: none"> 4.1.3.1. facilitating joint meetings with the Authority during the Implementation Phase to agree the KPIs in addition to the Implementation Working Group as required; 4.1.3.2. providing comprehensive data and evidence to support the appropriateness of the KPIs; 4.1.3.3. conducting modelling to identify levels of KPI performance; 4.1.3.4. providing evidence of the link between KPIs, PIs and Audits in accordance with Schedule 12 and Schedule 13; 4.1.4. The delivery of a series of communications in accordance with clause 15.4 by: <ul style="list-style-type: none"> 4.1.4.1. working collaboratively with the Authority to identify communication needs; 4.1.4.2. providing a mechanism to regularly push information to the stakeholders; 4.1.4.3. updating the information available against feedback gathered from stakeholders; 4.1.5. The process to populate the Authority Contract Handbook in accordance with clause 15.5 by: <ul style="list-style-type: none"> 4.1.5.1. working collaboratively with the Authority to identify requirements in the handbook; 4.1.5.2. proactively identifying needs of stakeholders to suggest content for the handbook; 4.1.5.3. providing the authority with relevant information so that the Authority can select the content required for the handbook; 4.1.6. The process to integrate with the TUPE obligations in Schedule 16. 					
	<p>4.2. The Tenderer's Training Services Management Plan details how the Tenderer will deliver and manage implementation of this Contract including:</p> <ul style="list-style-type: none"> 4.2.1. The production and management of an Implementation Programme by: <ul style="list-style-type: none"> 4.2.1.1. detailing individual activities required to deliver the key milestones in the Implementation Plan; 4.2.1.2. identifying the Key Personnel responsible for the activities against the list of Key Personnel in Schedule 11; 4.2.1.3. providing an Implementation Programme that can be accessed by the Authority via the Business Information Service at Annex E to Schedule 2; 4.2.1.4. periodically updating the information so that the Implementation Programme provides current information whenever required; 4.2.1.5. updating information in the Implementation Programme to reflect decisions and actions taken against each activity against the Implementation Plan; 4.2.2. The identification and management of risks to delivery of the Training Services on the SCD by: <ul style="list-style-type: none"> 4.2.2.1. identifying risks to the delivery of implementation; 4.2.2.2. identifying actions to mitigate the risks; 4.2.3. The management of a process to agree the KPIs produced in RoR 3 in accordance with part 3 of Schedule 12 by: <ul style="list-style-type: none"> 4.2.3.1. facilitating joint meetings with the Authority during the Implementation Phase to agree the KPIs in addition to the Implementation Working Group as required; 4.2.3.2. providing evidence of the link between KPIs, PIs and Audits in accordance with Schedule 12 and Schedule 13; 4.2.4. The delivery of a series of communications in accordance with clause 15.4 by: <ul style="list-style-type: none"> 4.2.4.1. working collaboratively with the Authority to identify communication needs; 4.2.4.2. providing a mechanism to regularly push information to the stakeholders; 		x			

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	<p>4.2.5. The process to populate the Authority Contract Handbook in accordance with clause 15.5 by:</p> <p>4.2.5.1. working collaboratively with the Authority to identify requirements in the handbook;</p> <p>4.2.5.2. providing the authority with requested;</p> <p>4.2.6. The process to integrate with the TUPE obligations in Schedule 16.</p>					
	<p>4.3. The Tenderer's Training Services Management Plan details how the Tenderer will deliver and manage implementation of this Contract including:</p> <p>4.3.1. The production and management of an Implementation Programme by:</p> <p>4.3.1.1. detailing activities required to deliver the key milestones in the Implementation Plan;</p> <p>4.3.1.2. providing an Implementation Programme that can be accessed by the Authority;</p> <p>4.3.1.3. periodically updating the information so that the Implementation Programme provides current information whenever required;</p> <p>4.3.1.4. updating information in the Implementation Programme to reflect decisions against activities;</p> <p>4.3.2. The identification and management of risks to delivery of the Training Services on the SCD by identifying risks to the delivery of implementation;</p> <p>4.3.3. The management of a process to agree the KPIs produced in RoR 3 in accordance with part 3 of Schedule 12 by facilitating joint meetings with the Authority during the Implementation Phase to agree the KPIs in addition to the Implementation Working Group as required;</p> <p>4.3.4. The delivery of a series of communications in accordance with clause 15.4 by working collaboratively with the Authority to identify communication needs;</p> <p>4.3.5. The process to populate the Authority Contract Handbook in accordance with clause 15.5 by providing the authority with requested information;</p> <p>4.3.6. The process to integrate with the TUPE obligations in Schedule 16.</p>			x		
	<p>4.4. The Tenderer's Training Services Management Plan details how the Tenderer will deliver and manage implementation of this Contract including:</p> <p>4.4.1. The production and management of an Implementation Programme;</p> <p>4.4.2. The identification and management of risks to delivery of the Training Services on the SCD;</p> <p>4.4.3. The management of a process to agree the KPIs produced in RoR 3 in accordance with part 3 of Schedule 12;</p> <p>4.4.4. The delivery of a series of communications in accordance with clause 15.4;</p> <p>4.4.5. The process to populate the Authority Contract Handbook in accordance with clause 15.5; and</p> <p>4.4.6. The process to integrate with the TUPE obligations in Schedule 16.</p>				x	
	<p>4.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
5.	<p>5.1. The Tenderer's Training Services Management Plan details how the Tenderer will deliver exit from this Contract including:</p> <p>5.1.1. The production and management of a draft Exit Plan by:</p> <p>5.1.1.1. explaining how the Tenderer will identify key milestones that map to the requirements of clause 73;</p> <p>5.1.1.2. identifying how the Tenderer will provide a comprehensive method of monitoring and updating key</p>	x				

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	<ul style="list-style-type: none"> 5.1.1.3. milestones in accordance with Schedule 3; 5.1.1.3. identifying how the Tenderer will ensure that the Key Personnel have the appropriate SQEP to manage or deliver the requirements of each key milestone; 5.1.1.4. identifying how the Tenderer will ensure that the Exit Plan will be continuously updated against the implementation activities; 5.1.1.5. identifying how the Tenderer will provide a clear and easy to understand method of displaying the Exit Plan to the Authority for visibility from the Effective Date; 5.1.1.6. identifying how the Tenderer will report the information in the Exit Plan to the Authority in accordance with Schedule 3; 5.1.2. The production and management of a programme of activities derived from the Exit Plan in accordance with clause 73; 5.1.2.1. detailing how the Tenderer will identify individual activities required to deliver the key milestones in the Exit Plan; 5.1.2.2. detailing how the Tenderer will identify the Key Personnel responsible for the activities against the list of Key Personnel in Schedule 11; 5.1.2.3. detailing how the Tenderer will provide an electronic Implementation Programme that can be accessed at all times by the Authority via the Business Information Service at Annex E to Schedule 2; 5.1.2.4. detailing how the Tenderer will implement a process to continuously update the information so that the Exit Programme provides real time information whenever required; 5.1.2.5. detailing how the Tenderer will provide comprehensive information in the Exit Programme to reflect decisions and actions taken against each activity against the Exit Plan; 5.1.3. The process to provide support to the Follow-on Contractor or the Authority in accordance with clause 73.45. 					
	<p>5.2. The Tenderer's Training Services Management Plan details how the Tenderer will deliver exit from this Contract including:</p> <ul style="list-style-type: none"> 5.2.1. The production and management of a draft Exit Plan by: <ul style="list-style-type: none"> 5.2.1.1. explaining how the Tenderer will identify key milestones that map to the requirements of clause 73; 5.2.1.2. identifying how the Tenderer will provide a method of monitoring and updating key milestones in accordance with Schedule 3; 5.2.1.3. identifying how the Tenderer will ensure that the Key Personnel have the appropriate SQEP to manage or deliver the requirements of the key milestones; 5.2.1.4. identifying how the Tenderer will ensure that the Exit Plan will be periodically updated against the implementation activities; 5.2.1.5. identifying how the Tenderer will provide a method of displaying the Exit Plan to the Authority for visibility from the Effective Date; 5.2.1.6. identifying how the Tenderer will report the information in the Exit Plan to the Authority in accordance with Schedule 3; 5.2.2. The production and management of a programme of activities derived from the Exit Plan in accordance with clause 73; 		x			

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	<ul style="list-style-type: none"> 5.2.2.1. detailing how the Tenderer will identify activities required to deliver the key milestones in the Exit Plan; 5.2.2.2. detailing how the Tenderer will identify the Key Personnel responsible for the activities against the list of Key Personnel in Schedule 11; 5.2.2.3. detailing how the Tenderer will provide an Implementation Programme that can be accessed at all times by the Authority via the Business Information Service at Annex E to Schedule 2; 5.2.2.4. detailing how the Tenderer will implement a process to update the information so that the Exit Programme provides current information whenever required; 5.2.2.5. detailing how the Tenderer will provide information in the Exit Programme to reflect decisions and actions taken against activities in the Exit Plan; 5.2.3. The process to provide support to the Follow-on Contractor or the Authority in accordance with clause 73.45. 					
	<p>5.3. The Tenderer's Training Services Management Plan details how the Tenderer will deliver exit from this Contract including:</p> <ul style="list-style-type: none"> 5.3.1. The production and management of a draft Exit Plan by: <ul style="list-style-type: none"> 5.3.1.1. explaining how the Tenderer will identify key milestones that map to the requirements of clause 73; 5.3.1.2. identifying how the Tenderer will provide a method of updating key milestones in accordance with Schedule 3; 5.3.1.3. identifying how the Tenderer will ensure that the Key Personnel have the appropriate SQEP to manage or deliver the requirements of the key milestones; 5.3.1.4. identifying how the Tenderer will report the information in the Exit Plan to the Authority in accordance with Schedule 3; 5.3.2. The production and management of a programme of activities derived from the Exit Plan in accordance with clause 73; <ul style="list-style-type: none"> 5.3.2.1. detailing how the Tenderer will identify activities required to deliver the key milestones in the Exit Plan; 5.3.2.2. detailing how the Tenderer will provide an Implementation Programme that can be accessed by the Authority; 5.3.2.3. detailing how the Tenderer will provide information in the Exit Programme to reflect decisions and actions taken against activities in the Exit Plan; 5.3.3. The process to provide support to the Follow-on Contractor or the Authority in accordance with clause 73.45. 			x		
	<p>5.4. The Tenderer's Training Services Management Plan details how the Tenderer will deliver exit from this Contract including:</p> <ul style="list-style-type: none"> 5.4.1. The production and management of a draft Exit Plan by: <ul style="list-style-type: none"> 5.3.2.4. explaining how the Tenderer will identify key milestones that map to the requirements of clause 73; 5.3.2.5. identifying how the Tenderer will report the information in the Exit Plan to the Authority in accordance with Schedule 3; 5.4.2. The production and management of a programme of activities derived from the Exit Plan in accordance with clause 73 by detailing how the Tenderer will identify activities required to deliver the key milestones in the Exit 				x	

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	Plan; 5.4.3. The process to provide support to the Follow-on Contractor or the Authority in accordance with clause 73.45.					
	5.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x

RoR: 02

TUPE/HR (Transfer of Undertaking (Protection of Employment) and Human Resources)

Aim

1. To select a solution that demonstrates an understanding of the workforce numbers, terms and conditions of employment and working practices, in order to ensure a smooth transfer of personnel and contribute to the seamless transition of services, all in accordance with TUPE regulations. Throughout the term of the contract, the solution will manage surplus staff and redundancies appropriately and maintain sufficient skilled staff to deliver the POTS requirement.

Background

2. The Authority considers that the provision of the services under POTS will result in "relevant transfers" in accordance with the Transfer of Undertakings (Protection of Employment) Regulations 2006 both from the Civil Service and from current service providers. Furthermore, the Authority considers that Government Guidance contained in 'Fair Deal for staff pensions: staff transfer from central government (October 2013)' applies.

3. The Authority will assess its level of confidence in the Tenderer's ability:

3.1. to meet its obligations as set out in the Transfer Regulations for the transfer of employees and in respect of the transfer of existing MOD terms and conditions for Authority Employees

3.2. to identify and address any impact its service delivery plans will have on the working practices, or location of the Transferring Employees

3.3. to produce and implement a cohesive plan to address the key HR transition deliverables specifically relating to the transferring activities and workforce

3.4. to follow appropriate procedures for the management of surplus staff and redundancies for Authority employees and employees of current providers of the services

3.5. to maintain sufficient skilled staff through its HR sustainability proposals

4. The requirement for this area is defined in:

4.1. Schedule 5 (Transition)

4.2. Transfer of Undertakings (Protection of Employment) Regulations 2006 as amended from time to time.

Responses Required:

5. **HR TRANSITION PROPOSALS**. HR Transition Proposals means the Tenderer's intentions covering the period from Contract Award to twelve months after the Relevant Transfer Date. Responses to the following HR Transition Proposals questions should be provided in narrative form with supporting analysis and documentation where appropriate.

THE MANAGEMENT OF STAFF TRANSFERS UNDER TUPE

5.1. The Tenderer is to provide, based on the information provided on transferring employees, the following details for each employer of transferring employees (including Authority Employees):

Name of Employer (prime contractor, sub-contractor, sub-sub-contractor)

No of employees;
 Grades;
 Job functions;
 Location of posts.

TERMS AND CONDITIONS OF EMPLOYMENT

5.2. The Authority will assess its level of confidence in the Tenderer’s ability to meet its obligations as set out in the Transfer Regulations for the transfer of transferring employees (including Authority Employees) and in respect of the transfer of existing MOD terms and conditions.

5.3. The Tenderer is to provide a list of any intentions to change existing MOD employment terms and conditions and, provide a summary of the reason why the change is being proposed. Responses are to be provided in the format below:

Change to employment terms and conditions	Reason for, and impact of, the proposed change

5.4. If the Tenderer does not intend to change existing MOD employment terms and conditions it should include a statement to this effect.

CHANGES TO WORKING PRACTICES (EXCLUDING REDUNDANCY PROPOSALS)

5.5. The Authority will assess its level of confidence that the Tenderer has considered any impact their service delivery plans will have on the working practices, or location of the Transferring Employees. Responses must be provided in the format below:

NOTE: - Working practices are assumed to be, but not limited to, shift and roster working, multi-skilling, team working, grade flexing, increased use of part-time staff and multiple site working.

Change to Working Practice	Reason for Change

5.6. If the Tenderer does not intend to change existing MOD employment terms and conditions it should include a statement to this effect.

HR TRANSITION DELIVERABLES

5.7. The Authority will assess its level of confidence that the Tenderer has a cohesive plan to address the key HR transition deliverables specifically relating to the transferring activities and workforce:

5.8. The Tenderer must describe:

5.8.1. the HR activity that will be undertaken to enable delivery of the business deliverables referred to above;

5.8.2. how the HR activities (including the TUPE transfer and mobilisation) will be managed;

5.8.3. the timing of the HR activities in the context of the Transition Phase; and

5.8.4. how the people skills and knowledge requirements will be managed where activities are transferred but there is no or insufficient corresponding staff transfer under the Transfer Regulations.

5.9. Tenderers should describe how they will meet any additional people resource requirements for the Service Delivery Workforce during the transition phase including any recruitment plans. Provide details of where you consider significant recruitment will be necessary; include locations, functions and how the recruitment will be undertaken.

5.10. How does the Tenderer plan to induct Transferring Employees and any new employees into its organisation and to induct all staff including existing employees into the service delivery model during the HR transition period? The response should describe the employer's proposals for engaging and communicating with new, transferring and existing staff on the impact on them individually and collectively in establishing the service delivery model and their role in the delivery of the service.

NOTE: The response to this question must be no more than ten pages of A4.

THROUGH THE TERM OF THE CONTRACT

6. REDUNDANCY MANAGEMENT

6.1. Whether arising directly as a result of the transfer, or unrelated to the transfer itself, employers are required to follow fair and reasonable procedures in managing staff surplus and redundancy situations. The Authority will assess its level of confidence that the Tenderer has appropriate procedures that would be followed for the management of surplus staff and redundancies for Authority employees and employees of current providers of the services.

6.2. Tenderers must identify any planned redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date including identifying:

6.2.1. The timing/phasing of any anticipated redundancies;

6.2.2. The reason for the redundancies;

6.2.3. The number of redundancies;

6.2.4. The location of the staff affected;

6.2.5. The roles of the staff affected;

6.2.6. The composition of 'at risk' grouping of staff, e.g. transferring Authority Employees, transferring current provider employees, existing employees; and

6.2.7. How the dismissals will be decided upon, implemented and managed including detailing the proposed selection criteria.

6.3. Tenderers must explain how they will meet legal and policy obligations when managing and administering the redundancies detailed above, ensuring it is a fair and reasonable process.

6.4. If the Tenderer does not intend to make any planned redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date then it should include a statement to this effect.

7. HR SUSTAINABILITY PROPOSALS

7.1. The Authority needs to have confidence that the Tenderer's HR Sustainability Proposals will maintain sufficient skilled staff.

7.2. The Tenderer must provide details of the strategies and plans, which must be relevant to the POTS requirement, it has to ensure that the service delivery solution they have proposed can be maintained during the term of the Contract. Details should include, but not limited to, the recruitment, retention, and re-skilling of the workforce during the term of the Contract, and how risks to HR sustainability will be managed and mitigated.

7.3. The response to this question should be no more than six pages of A4 but may refer to specific parts of the response to RoR8 as appropriate.

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1.1. The Tenderer's solution will meet the Tenderer's obligations as set out in the Transfer Regulations for the transfer of all employees and in respect of the transfer of existing MOD terms and conditions for Authority Employees.</p> <p>1.2. The tenderer will follow its procedures, which must be fair, reasonable and appropriate, for the management of surplus staff and redundancies for Authority employees and employees of current providers of the services.</p>	In the Authority's opinion all of the statements on the left are true				x
2.	<p>KEY STATEMENTS</p> <p><u>HR TRANSITION PROPOSALS</u></p> <p><u>THE MANAGEMENT OF STAFF TRANSFERS UNDER TUPE</u></p> <p>2.1. The Tenderer's HR Transition Proposals cover the period from Contract Award to twelve months after the Relevant Transfer Date.</p> <p>2.2. The Tenderer's HR Transition Proposals include all employees on whom the Authority provided TUPE information and are completely accurate against that information with respect to employer, number of employees, grades, job functions and location of posts.</p> <p>2.3. The Tenderer's HR Transition Proposals cover the period from Contract Award to twelve months after the Relevant Transfer Date.</p> <p>2.4. The Tenderer's HR Transition Proposals include all employees on whom the Authority provided TUPE information and are accurate against that information with respect to employer, number of employees, grades, job functions and location of posts, apart from up to 3 errors.</p> <p>2.5. The Tenderer's HR Transition Proposals cover the period from Contract Award to twelve months after the Relevant Transfer Date.</p> <p>2.6. The Tenderer's HR Transition Proposals include all employees on whom the Authority provided TUPE information and are accurate against that information with respect to employer, number of employees, grades, job functions and location of posts, but with more than 3 errors.</p>	x				
			x			
				x		

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	4.5 The Tenderer has listed its intentions to change existing working practices and provided some explanation in support of them.				x	
	4.6 In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
5.	<p><u>HR TRANSITION DELIVERABLES</u></p> <p>5.8 The Tenderer has demonstrated that it has a cohesive, integrated, workable plan to address the key HR transition deliverables specifically relating to the transferring activities and workforce.</p> <p>5.9 The Tenderer has fully described:</p> <p>5.2.1. the HR activity that will be undertaken to enable delivery;</p> <p>5.2.2. how the HR activities (including the TUPE transfer and mobilisation) will be managed;</p> <p>5.2.3. the timing of the HR activities in the context of the Transition Phase; and</p> <p>5.2.4. how the people skills and knowledge requirements will be managed where activities are transferred but there is no or insufficient corresponding staff transfer under the Transfer Regulations.</p> <p>5.10 The Tenderer has demonstrated in a comprehensive and detailed way how it will meet any additional people resource requirements during the transition phase.</p> <p>5.11 The Tenderer has demonstrated that its proposals to meet any additional people resource requirements during the transition phase will be highly efficient and highly effective.</p> <p>5.12 The Tenderer has demonstrated that its plan to induct Transferring Employees and any new employees into its organisation will be highly efficient and highly effective.</p> <p>5.13 The Tenderer's proposals for engaging and communicating with new, transferring and existing staff on the impact on them individually and collectively are proactive, feasible, sensitive and proven through other transfers.</p>	x				
	<p>5.14 The Tenderer has demonstrated that it has a cohesive, integrated, workable plan to address the key HR transition deliverables specifically relating to the transferring activities and workforce.</p> <p>5.15 The Tenderer has fully described:</p> <p>5.15.1. the HR activity that will be undertaken to enable delivery;</p> <p>5.15.2. how the HR activities (including the TUPE transfer and mobilisation) will be managed;</p> <p>5.15.3. the timing of the HR activities in the context of the Transition Phase; and</p> <p>5.15.4. how the people skills and knowledge requirements will be managed where activities are transferred but there is no or insufficient corresponding staff transfer under the Transfer Regulations.</p> <p>5.16 The Tenderer has demonstrated that it will meet any additional people resource requirements during the transition phase.</p> <p>5.17 The Tenderer has demonstrated that its proposals to meet any additional people resource requirements during the transition phase will be efficient and effective.</p> <p>5.18 The Tenderer has demonstrated that its plan to induct Transferring Employees and any new employees into its organisation will be efficient and effective</p> <p>5.19 The Tenderer's proposals for engaging and communicating with new, transferring and existing staff on the impact on them individually and collectively are proactive, feasible and sensitive.</p>	x				

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	<p>5.20 The Tenderer has demonstrated that it has a cohesive, integrated, workable plan to address the key HR transition deliverables specifically relating to the transferring activities and workforce.</p> <p>5.21 The Tenderer has fully described:</p> <p>5.14.1. the HR activity that will be undertaken to enable delivery;</p> <p>5.14.2. how the HR activities (including the TUPE transfer and mobilisation) will be managed;</p> <p>5.14.3. the timing of the HR activities in the context of the Transition Phase; and</p> <p>5.14.4. how the people skills and knowledge requirements will be managed where activities are transferred but there is no or insufficient corresponding staff transfer under the Transfer Regulations.</p> <p>5.22 The Tenderer has demonstrated that it will meet any additional people resource requirements during the transition phase.</p> <p>5.23 The Tenderer has demonstrated that its proposals to meet any additional people resource requirements during the transition phase will be efficient and effective.</p> <p>5.24 The Tenderer has demonstrated that its plan to induct Transferring Employees and any new employees into its organisation will be efficient and effective</p> <p>5.25 The Tenderer's proposals for engaging and communicating with new, transferring and existing staff on the impact on them individually and collectively are proactive, feasible and sensitive.</p>			x		
	<p>5.26 The Tenderer has demonstrated that it has a workable plan to address the key HR transition deliverables specifically relating to the transferring activities and workforce.</p> <p>5.27 The Tenderer has described:</p> <p>5.20.1. the HR activity that will be undertaken to enable delivery;</p> <p>5.20.2. how the HR activities (including the TUPE transfer and mobilisation) will be managed;</p> <p>5.20.3. the timing of the HR activities in the context of the Transition Phase; and</p> <p>5.20.4. how the people skills and knowledge requirements will be managed where activities are transferred but there is no or insufficient corresponding staff transfer under the Transfer Regulations.</p> <p>5.28 The Tenderer has demonstrated that it will meet any additional people resource requirements during the transition phase.</p> <p>5.29 The Tenderer has demonstrated that its proposals to meet any additional people resource requirements during the transition phase will be efficient and effective.</p> <p>5.30 The Tenderer has demonstrated that its plan to induct Transferring Employees and any new employees into its organisation will be efficient and effective</p> <p>5.31 The Tenderer's proposals for engaging and communicating with new, transferring and existing staff on the impact on them individually and collectively are feasible.</p>				x	
	<p>5.32 In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
6.	<p><u>REDUNDANCY MANAGEMENT</u></p> <p>6.1 Either the Tenderer's HR Proposals have included a statement to the effect that it does not intend to make any redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date or the following statements (6.2-6.3) apply.</p>	x				

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<p>6.2</p>	<p>For avoidance of doubt, statement 6.4 must apply in any case.</p> <p>The Tenderer has demonstrated that it has a cohesive, integrated, workable plan to achieve any planned redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date. The redundancy plan includes comprehensive details of:</p> <p>6.2.1 The reason for the redundancies;</p> <p>6.2.2 The number of redundancies;</p> <p>6.2.3 The location of staff affected;</p> <p>6.2.4 The roles of staff affected;</p> <p>6.2.5 The composition of 'at risk' grouping of staff, e.g. transferring Authority Employees, transferring current provider employees, existing employees;</p> <p>6.2.6 How the dismissals will be decided upon, implemented and managed including detailing the proposed selection criteria.</p> <p>6.3 The Tenderer has demonstrated that any Economical, Technical or Organisational redundancies will be of net benefit to the Authority.</p> <p>6.4 The Tenderer has demonstrated that it has fair, reasonable and appropriate procedures in managing staff surplus and redundancy situations, and will follow them in a highly efficient and highly effective manner.</p>					
<p>6.5</p>	<p>The Tenderer has demonstrated that it has a cohesive, integrated, workable plan to achieve any planned redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date. The redundancy plan includes comprehensive details of:</p> <p>6.5.1 The reason for the redundancies;</p> <p>6.5.2 The number of redundancies;</p> <p>6.5.3 The location of staff affected;</p> <p>6.5.4 The roles of staff affected;</p> <p>6.5.5 The composition of 'at risk' grouping of staff, e.g. transferring Authority Employees, transferring current provider employees, existing employees;</p> <p>6.5.6 How the dismissals will be decided upon, implemented and managed including detailing the proposed selection criteria.</p> <p>6.6 The Tenderer has demonstrated that it has fair, reasonable and appropriate procedures in managing staff surplus and redundancy situations, and will follow them in an efficient and effective manner.</p>		<p align="center">x</p>			
<p>6.7</p>	<p>The Tenderer has demonstrated that it has a workable plan to achieve any planned redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date. The redundancy plan includes details of:</p> <p>6.7.1 The reason for the redundancies;</p> <p>6.7.2 The number of redundancies;</p> <p>6.7.3 The location of staff affected;</p> <p>6.7.4 The roles of staff affected;</p> <p>6.7.5 The composition of 'at risk' grouping of staff, e.g. transferring Authority Employees, transferring current provider employees, existing employees;</p> <p>6.7.6 How the dismissals will be decided upon, implemented and managed including detailing the proposed selection criteria.</p>			<p align="center">x</p>		

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	6.8	The Tenderer has demonstrated that it has fair, reasonable and appropriate procedures in managing staff surplus and redundancy situations, and will follow them.					
	6.9	The Tenderer has provided a plan to achieve any planned redundancy dismissals of employees on Economical, Technical or Organisational grounds to be implemented immediately or within the first 12 months post the Relevant Transfer Date.				x	
	6.10	The Tenderer has demonstrated that it has fair, reasonable and appropriate procedures in managing staff surplus and redundancy situations.					
	6.11	In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
7.	<u>HR SUSTAINABILITY PROPOSALS</u>						
	7.1	The Tenderer has provided comprehensive details of its HR Sustainability Proposals, including, but not limited to, the recruitment, retention, and re-skilling of the workforce.					
	7.2	The Tenderer's HR Sustainability Proposals will ensure that the service delivery solution it has proposed can be maintained at a high level during the term of the Contract.					
	7.3	The Tenderer's HR Sustainability Proposals are highly relevant to the POTS requirement					
	7.4	The Tenderer has identified risks to HR sustainability and demonstrated clearly how they will be managed and mitigated in a highly effective way.					
	7.5	The Tenderer's HR Sustainability Proposals are completely coherent with the Tenderer's response to the HR elements of RoR8.	x				
	7.6	The Tenderer has provided comprehensive details of its HR Sustainability Proposals, including, but not limited to, the recruitment, retention, and re-skilling of the workforce.					
	7.7	The Tenderer's HR Sustainability Proposals will ensure that the service delivery solution it has proposed can be maintained during the term of the Contract.					
	7.8	The Tenderer's HR Sustainability Proposals are relevant to the POTS requirement					
	7.9	The Tenderer has identified risks to HR sustainability and demonstrated how they will be managed and mitigated effectively.				x	
	7.10	The Tenderer's HR Sustainability Proposals are coherent with the Tenderer's response to the HR elements of RoR8.					
	7.11	The Tenderer has provided details of its HR Sustainability Proposals, including, but not limited to, the recruitment, retention, and re-skilling of the workforce.					
	7.12	The Tenderer's HR Sustainability Proposals will ensure that the service delivery solution it has proposed can be maintained during the term of the Contract.					
	7.13	The Tenderer's HR Sustainability Proposals are relevant to the POTS requirement					
	7.14	The Tenderer has identified risks to HR sustainability and demonstrated how they will be managed and mitigated.				x	
	7.15	The Tenderer's HR Sustainability Proposals are coherent with the Tenderer's response to the HR elements of RoR8.					
	7.16	The Tenderer has provided details of its HR Sustainability Proposals.					
	7.17	The Tenderer's HR Sustainability Proposals will ensure that the service delivery solution it has proposed can be					x

	maintained during the term of the Contract.					
7.18	The Tenderer's HR Sustainability Proposals are relevant to the POTS requirement					
7.19	The Tenderer has identified risks to HR sustainability.					
7.20	The Tenderer has referred to the Tenderer's response to RoR8.					
7.21	In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x

"HR Sustainability Proposals"	Means the Tenderer's intentions covering sourcing and retention strategies, training and skills from the Relevant Transfer date for the duration of the Contract;
"Service Delivery Workforce"	The workforce that the Tenderer will use to deliver the Services. This may include Transferring Employees, current employees of the Tenderer and employees recruited by the Tenderer to deliver the Services;
"Transferring Employees"	Means all employees (including Authority Employees and employees of current providers of the services) who are assigned to or whose principal purpose is to provide the Services to be provided by the Tenderer and who subsequently transfer under the Transfer Regulations (or any similar legislation enacting the Acquired Rights Directive) to the Tenderer;
"Authority Employee"	Means those employees of the Authority who are listed in the employee list on the Relevant Transfer Date;
"Relevant Transfer Date"	Means the date on which the transfer to the Contractor or an Employing Sub-Contractor of the Authority Employees pursuant to this Contract and the Transfer Regulations is effected;
"Services"	Shall have the meaning specified in the POTS Statement of Requirement;
"Transfer Regulations"	Means the Transfer of Undertakings (Protection of Employment) Regulations 2006 as amended from time to time and/or the Service Provision Change (Protection of Employment) Regulations (Northern Ireland) 2006 (as amended from time to time), as appropriate ;
"Employing Sub-Contractor"	Means any sub-contractor of the Contractor providing any part of the Services who is or is to be the employer of Transferring Employee.

ROR 03

Governance and Performance Management

Aim

1. To select a solution that will deliver appropriate governance and performance management of this Contract.

Background

2. This RoR covers the requirement of the Tenderer to deliver governance and performance management of this Contract.
3. The requirement for this area is defined in:
 - 3.1. Schedule 2 (Statement of Requirements)
 - 3.2. Schedule 3 (Governance and Contract Management)
 - 3.3. Schedule 11 (Key Personnel)
 - 3.4. Schedule 12 (Performance Mechanism)
 - 3.5. Schedule 13 (Authority Audit)

Responses Required:

4. The Tenderer will provide the organogram in Schedule 11 (Key Personnel) detailing the overall structure and Key Personnel managing this Contract including:
 - 4.1.1. Identifying the Key Personnel in Schedule 11 in accordance with clause 18 and Schedule 3;
 - 4.1.2. how the Key Personnel will be employed in delivering governance and managing performance in this contract;
 - 4.1.3. the SQEP details of its Key Personnel; and
 - 4.1.4. Any other Key Personnel involved in the delivery of this Contract that form part of the overall organisation organogram (including which Training Services they are delivering and therefore in which RoR their details are contained).
5. The Tenderer will provide a Training Services Management Plan for Part 3 (Governance and Contract Management) of Schedule 9 detailing how the Tenderer will deliver governance and contract management that includes the following:
 - 5.1. Governance Boards and Meetings:
 - 5.1.1. how the Tenderer will ensure that the functions of the governance boards and meetings are carried out;
 - 5.1.2. how the Tenderer will ensure that administrative requirements are provided for the boards and meetings;
 - 5.1.3. how the Tenderer will ensure that appropriate planning is in place to hold the boards on the periodicities stated in Schedule 3;
 - 5.2. Governance Deliverables:

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5.2.1. How the Tenderer will ensure that documentation for the boards is accurate and provided on time;

5.2.2. How the Tenderer will identify management information required for the annual, quarterly and monthly reports in accordance with Schedule 3;

5.2.3. How the Tenderer will manage the requirements to review and agree governance reports;

5.2.4. How the Tenderer will manage the requirement to review other data or documents provided to the boards or at the meetings in accordance with Schedule 3;

5.2.5. How the Tenderer will manage any dispute referrals at the boards or meetings;

6. The Tenderer will provide the KPIs in accordance with paragraph 15.1 of Schedule 12 for agreement during the Implementation Phase.

7. The Tenderer will provide the Level 2 Deductions and Level 1 Deductions for Table 1 and 2 in Schedule 13 Authority Audit.

8. The Tenderer will provide a Training Services Management Plan for Part 13 of Schedule 9 detailing how the Tenderer will deliver performance management that includes the following:

8.1. Performance Monitoring System

8.1.1. How the Tenderer will implement the Performance Monitoring System in part 3 to Schedule 12 including:

8.1.1.1. How the KPIs will be presented on the Performance Monitoring System;

8.1.1.2. How the KPIs are fed by appropriate PIs and how these PIs are defined;

8.1.1.3. How the PIs and KPIs will be measured and reported in accordance with Schedule 3 and Annex E to Schedule 2;

8.1.1.4. How source data will be collected to provide performance measurement;

8.1.2. How the Tenderer will summarise the data held on the Performance Monitoring System for the governance reports in accordance with Schedule 3;

8.1.3. How the Tenderer will provide visibility of performance at all times through the duration of this Contract;

8.2. Audit

8.2.1. How the Tenderer will assist the Authority in the conduct of Authority Audits in accordance with Schedule 13;

8.2.2. How the Tenderer will utilise the Performance Monitoring System to record Audit results including:

8.2.2.1. How the Tenderer will evidence satisfactory performance against the Audit Criteria;

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- 8.2.2.2. How the Tenderer will evidence unsatisfactory performance against the Audit Criteria; and
- 8.2.2.3. How the Tenderer will monitor and demonstrate the recovery of performance against remedy plans;
- 8.2.2.4. How the Tenderer will record and monitor EPIs from the audit results.

8.3. Performance Shortfalls

8.3.1. How the Tenderer will manage performance shortfalls and restore Satisfactory Performance in accordance with Schedule 12 including:

- 8.3.1.1. The implementation of a Performance Register to record progress against remedy plans;
- 8.3.1.2. How the Tenderer will summarise progress against remedy plans in the governance reports;
- 8.3.1.3. How the Tenderer will use the Performance Register to identify and monitor fluctuations in PIs and KPIs;
- 8.3.1.4. How the Tenderer will use the Performance Register to remedy any observations received from the Audit conducted in accordance with Schedule 13;

8.3.2. How the Tenderer shall work collaboratively with the Authority to immediately identify any performance shortfalls or potential shortfalls in order to avoid a performance failure in accordance with Schedule 12;

Guidance for Evaluators

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1.1. The Tenderer’s solution will deliver continued compliance with all standards and address all constraints.</p> <p>1.2. The Tenderer’s solution identifies Key Personnel to deliver the governance and performance management requirement for Schedule 11 (Key Personnel).</p> <p>1.3. The Tenderer’s solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism).</p>	In the Authority’s opinion all of the statements on the left are true, or				x
2.	<p>KEY STATEMENTS</p> <p>2.1. The Tenderer has identified Key Personnel for the Level 1 Strategic Board, Level 2 Operating Board and Level 3 Performance and Change Working Group in accordance with Schedule 3;</p> <p>2.2. The Tenderer’s list of Key Personnel in Schedule 11 delivering contract and performance management details how the Tenderer will:</p> <p>2.2.1. Provide substantial management oversight and delivery of governance and performance management activities to ensure the delivery of Training Services in this Contract;</p> <p>2.2.2. Build relationships and work collaboratively with the Authority throughout the duration of this Contract;</p> <p>2.2.3. identify and understand the management of systems in complex environments so that governance and performance can be managed holistically rather than in discrete activities;</p> <p>2.2.4. Ensure that the key personnel have a proven track record of managing multiple work stream activities in a complex environment;</p> <p>2.2.5. Ensure that Key Personnel have a proven track record of substantial and current experience in analysis of data from a large variety of sources;</p> <p>2.2.6. Ensure that Key Personnel have a proven track record of substantial and current experience in managing performance within large and complex contracts;</p>					
	<p>2.3. The Tenderer has identified Key Personnel for the Level 1 Strategic Board, Level 2 Operating Board and Level 3 Performance and Change Working Group in accordance with Schedule 3;</p> <p>2.4. The Tenderer’s list of Key Personnel in Schedule 11 delivering contract and performance management details how the Tenderer will:</p> <p>2.4.1. Provide management oversight and delivery of governance and performance management activities to</p>					

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	<p>ensure the delivery of Training Services in this Contract;</p> <p>2.4.2. work collaboratively with the Authority throughout the duration of this Contract;</p> <p>2.4.3. identify and understand the management of systems so that governance and performance can be managed holistically rather than in discrete activities;</p> <p>2.4.4. Ensure that the key personnel have experience of managing multiple work stream activities in a complex environment;</p> <p>2.4.5. Ensure that Key Personnel have experience in analysis of data from a large variety of sources;</p> <p>2.4.6. Ensure that Key Personnel have experience in managing performance within large and complex contracts;</p>					
	<p>2.5. The Tenderer has identified Key Personnel for the Level 1 Strategic Board, Level 2 Operating Board and Level 3 Performance and Change Working Group in accordance with Schedule 3;</p> <p>2.6. The Tenderer's list of Key Personnel in Schedule 11 delivering contract and performance management details how the Tenderer will:</p> <p>2.6.1. Provide delivery of governance and performance management activities to ensure the delivery of Training Services in this Contract;</p> <p>2.6.2. work collaboratively with the Authority throughout the duration of this Contract;</p> <p>2.6.3. Ensure that the key personnel have experience of managing activities in a complex environment;</p> <p>2.6.4. Ensure that Key Personnel have experience in analysis of data;</p> <p>2.6.5. Ensure that Key Personnel have experience in managing performance;</p>					
	<p>2.7. The Tenderer has identified Key Personnel for the Level 1 Strategic Board, Level 2 Operating Board and Level 3 Performance and Change Working Group in accordance with Schedule 3;</p> <p>2.8. The Tenderer's list of Key Personnel in Schedule 11 delivering contract and performance management details how the Tenderer will provide delivery of governance and performance management activities to ensure the delivery of Training Services in this Contract;</p>					
	<p>2.9. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.</p>					
3.	<p>3.1. The Tenderer's Training Services Management Plan for Part 3 (Governance and Contract Management) of Schedule 14 details how the Tenderer will deliver governance and management of this Contract including:</p> <p>3.1.1. How the Tenderer will ensure that its responsibilities for the governance boards and meetings in accordance with Schedule 3 are carried out by:</p> <p>3.1.1.1. Calling for information early in order to provide the relevant calling notices and agendas for the boards and meetings when required and as directed in Schedule 3;</p> <p>3.1.1.2. Informing the Authority and Key Personnel identified in Schedule 11 of their requirements in plenty of time prior to the governance boards and meetings;</p> <p>3.1.1.3. Advising the Authority and Key Personnel on any deliverables required in plenty of time prior to the governance boards and meetings;</p> <p>3.1.1.4. Pushing information to the Authority and Key Personnel as required to provide background support to the governance boards and meetings;</p> <p>3.1.1.5. Providing continuously updated management information to the Authority and relevant Key Personnel in order to allow them to prepare for the governance boards and meetings;</p>					

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	<p>3.1.1.6. Providing early visibility of drafts of documents required for the governance boards and meetings;</p> <p>3.1.1.7. Producing a comprehensive and in-depth minutes clearly articulating discussions, decisions and actions with attributable personnel;</p> <p>3.1.1.8. Producing and collating relevant documents to support the minutes;</p> <p>3.1.1.9. Providing draft minutes to the Authority for approval; hastening the Authority regularly to ensure the minutes are approved in a timely manner and finalising the minutes for publication within the timescales directed in Schedule 3;</p> <p>3.1.1.10. Publishing and configuration controlling all governance documents and deliverables in electronic format for Authority view at any time via the Business Information Service in accordance with Annex E to Schedule 2;</p> <p>3.1.2. How the Tenderer will ensure that processes for the governance boards and meetings in accordance with Schedule 3 are implemented by:</p> <p>3.1.2.1. Conducting appropriate early planning and identification of dates for the governance boards and meetings;</p> <p>3.1.2.2. Ensuring that processes are in place to deal with the requirements of ad hoc meetings in accordance with Schedule 3;</p> <p>3.1.2.3. Horizon scanning to identify if ad hoc meetings or changes to scheduled meetings may be required and advising the Authority accordingly;</p> <p>3.1.2.4. Ensuring that processes are in place to deal with ad hoc requirements to review documents;</p> <p>3.1.2.5. Ensuring that processes are in place to deal with additional ad hoc re-drafts of governance documents;</p> <p>3.1.2.6. Ensuring that the Tenderer conducts early work with the Authority to agree deliverables prior to the relevant governance board or meeting so that the board or meeting personnel are fully and appropriately informed and prepared to agree the deliverable;</p> <p>3.1.2.7. Ensuring that the Tenderer conducts early work with the Authority to discuss disputes and issues prior to the relevant governance board or meeting so that the board or meeting personnel are fully and appropriately informed and prepared to discuss and agree actions against the dispute;</p> <p>3.1.3. How the Tenderer will proactively manage all processes and deliverables to support the governance and management of this Contract and adjust and review these processes and deliverables regularly to ensure that they are effective and fit for purpose;</p>					
	<p>3.2. The Tenderer's Training Services Management Plan for Part 3 (Governance and Contract Management) of Schedule 14 details how the Tenderer will deliver governance and management of this Contract including:</p> <p>3.2.1. How the Tenderer will ensure that its responsibilities for the governance boards and meetings in accordance with Schedule 3 are carried out by:</p> <p>3.2.1.1. Calling for information in order to provide the relevant calling notices and agendas for the boards and meetings when required and as directed in Schedule 3;</p> <p>3.2.1.2. Advising the Authority and Key Personnel on any deliverables required in time for the governance boards and meetings;</p> <p>3.2.1.3. Providing updated management information to the Authority and relevant Key Personnel in accordance with Schedule 3;</p>					

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	<p>3.2.1.4. Producing comprehensive minutes clearly articulating discussions, decisions and actions;</p> <p>3.2.1.5. Producing and collating relevant documents to support the minutes;</p> <p>3.2.1.6. Providing draft minutes to the Authority for approval and finalising the minutes for publication within the timescales directed in Schedule 3;</p> <p>3.2.1.7. Publishing all governance documents and deliverables for Authority view via the Business Information Service in accordance with Annex E to Schedule 2;</p> <p>3.2.2. How the Tenderer will ensure that processes for the governance boards and meetings in accordance with Schedule 3 are implemented by:</p> <p>3.2.2.1. Conducting appropriate planning and identification of dates for the governance boards and meetings;</p> <p>3.2.2.2. dealing with the requirements of ad hoc meetings in accordance with Schedule 3;</p> <p>3.2.2.3. Ensuring that the Tenderer conducts early work with the Authority to agree deliverables prior to the relevant governance board or meeting so that the board or meeting personnel are fully and appropriately informed and prepared to agree the deliverable;</p> <p>3.2.2.4. Ensuring that the Tenderer conducts early work with the Authority to discuss disputes and issues prior to the relevant governance board or meeting so that the board or meeting personnel are fully and appropriately informed and prepared to discuss and agree actions against the dispute;</p> <p>3.2.3. How the Tenderer will manage all processes and deliverables to support the governance and management of this Contract;</p>					
	<p>3.3. The Tenderer's Training Services Management Plan for Part 3 (Governance and Contract Management) of Schedule 14 details how the Tenderer will deliver governance and management of this Contract including:</p> <p>3.3.1. How the Tenderer will ensure that its responsibilities for the governance boards and meetings in accordance with Schedule 3 are carried out by:</p> <p>3.3.1.1. Calling for information in order to provide the relevant calling notices and agendas for the boards and meetings when required and as directed in Schedule 3;</p> <p>3.3.1.2. Providing management information to the Authority and relevant Key Personnel in accordance with Schedule 3;</p> <p>3.3.1.3. Producing minutes articulating, decisions and actions;</p> <p>3.3.1.4. Providing draft minutes to the Authority for approval and finalising the minutes for publication within the timescales directed in Schedule 3;</p> <p>3.3.1.5. Publishing all governance documents and deliverables for Authority view via the Business Information Service in accordance with Annex E to Schedule 2;</p> <p>3.3.2. How the Tenderer will ensure that processes for the governance boards and meetings in accordance with Schedule 3 are implemented by identifying dates for the governance boards and meetings;</p> <p>3.3.3. How the Tenderer will manage all processes and deliverables to support the governance and management of this Contract;</p>					
	<p>3.4. The Tenderer's Training Services Management Plan for Part 3 (Governance and Contract Management) of Schedule 14 details how the Tenderer will deliver governance and management of this Contract including:</p> <p>3.4.1. How the Tenderer will ensure that its responsibilities for the governance boards and meetings in accordance with Schedule 3 are carried out;</p>					

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	<p>3.4.2. How the Tenderer will ensure that processes for the governance boards and meetings in accordance with Schedule 3 are implemented;</p> <p>3.4.3. How the Tenderer will manage all processes and deliverables to support the governance and management of this Contract.</p>					
	3.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.					
4.	<p>4.1. The Tenderer's solution includes KPIs that:</p> <p>4.1.1. Are clearly mapped to the Training Services listed in paragraph 15 of part 3 of Schedule 12;</p> <p>4.1.2. Are quantifiable and measurable, and do not link to intangible goals;</p> <p>4.1.3. are measured using metrics that are appropriate, clearly defined and consistent;</p> <p>4.1.4. are measuring aspects of the Training Services over which the Tenderer and Authority have control;</p> <p>4.1.5. are able to provide early warning of potential problems or opportunities;</p> <p>4.1.6. indicate trends in Tenderer performance;</p> <p>4.1.7. align with the strategic objectives of FOST and are relevant to the successful delivery of the Training Services in Schedule 2;</p> <p>4.1.8. directly informs the Training Optimisation Service in accordance with Annex G to Schedule 2;</p> <p>4.1.9. Are able to be adjusted by agreement between the Parties in order to track or monitor changes due to Training Optimisation activities in Annex G to Schedule 2;</p> <p>4.1.10. are clearly mapped to PIs being used to measure the delivery of individual outputs to achieve each requirement of this Contract;</p> <p>4.1.11. are clearly aligned to the Audit Criteria in Schedule 13;</p> <p>4.1.12. directly contribute to the overall performance measured against the Audit Criteria in Schedule 13;</p>	x				
	<p>4.2. The Tenderer's solution includes KPIs that:</p> <p>4.2.1. Are clearly mapped to the Training Services listed in paragraph 15 of part 3 of Schedule 12;</p> <p>4.2.2. Are quantifiable and measurable, and do not link to intangible goals;</p> <p>4.2.3. are measured using metrics that are appropriate, clearly defined and consistent;</p> <p>4.2.4. are able to provide early warning of potential problems or opportunities;</p> <p>4.2.5. indicate trends in Tenderer performance;</p> <p>4.2.6. directly informs the Training Optimisation Service in accordance with Annex G to Schedule 2;</p> <p>4.2.7. Are able to be adjusted by agreement between the Parties;</p> <p>4.2.8. are clearly mapped to PIs being used to measure the delivery of individual outputs to achieve each requirement of this Contract;</p> <p>4.2.9. are clearly aligned to the Audit Criteria in Schedule 13;</p>					
	<p>4.3. The Tenderer's solution includes KPIs that:</p> <p>4.3.1. Are mapped to the Training Services listed in paragraph 15 of part 3 of Schedule 12;</p> <p>4.3.2. Are quantifiable and measurable;</p> <p>4.3.3. are able to provide early warning of potential problems or opportunities;</p> <p>4.3.4. Are able to be adjusted by agreement between the Parties;</p> <p>4.3.5. are clearly mapped to PIs being used to measure the delivery of individual outputs to achieve each</p>			x		

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	requirement of this Contract;					
	<p>4.4. The Tenderer's solution includes KPIs that:</p> <p>4.4.1. Are mapped to the Training Services listed in paragraph 15 of part 3 of Schedule 12;</p> <p>4.4.2. Are quantifiable and measurable;</p> <p>4.4.3. are able to provide early warning of potential problems;</p> <p>4.4.4. are mapped to PIs;</p>				x	
	4.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.					x
5.	<p>5.1. The Tenderer's solution includes deductions that:</p> <p>5.1.1. Are clearly mapped to the procedures and deliverables in the Audit Criteria in Schedule 13;</p> <p>5.1.2. Are valued in an appropriate way to incentivise the Tenderer to deliver high quality Training Services in this Contract against the Audit Criteria;</p> <p>5.1.3. Are easily measured against the Monthly Sum or Annual Price of this Contract;</p> <p>5.1.4. Are appropriately weighted to the area of delivery;</p> <p>5.1.5. Are clearly escalated from a Level 2 to a Level 1 deduction;</p> <p>5.1.6. Clearly incentivise the Tenderer to provide a comprehensive remedy plan that is agreed as a matter of urgency;</p>	x				
	<p>5.2. The Tenderer's solution includes deductions that:</p> <p>5.2.1. Are clearly mapped to the procedures and deliverables in the Audit Criteria in Schedule 13;</p> <p>5.2.2. Are valued in an appropriate way to incentivise the Tenderer to deliver high quality Training Services in this Contract against the Audit Criteria;</p> <p>5.2.3. Are appropriately weighted to the area of delivery;</p> <p>5.2.4. Are clearly escalated from a Level 2 to a Level 1 deduction;</p> <p>5.2.5. Clearly incentivise the Tenderer to provide a comprehensive remedy plan that is agreed as a matter of urgency;</p>					
	<p>5.3. The Tenderer's solution includes deductions that:</p> <p>5.3.1. Are clearly mapped to the procedures and deliverables in the Audit Criteria in Schedule 13;</p> <p>5.3.2. Are valued in an appropriate way to incentivise the Tenderer to deliver quality Training Services in this Contract against the Audit Criteria;</p> <p>5.3.3. Are appropriately weighted to the area of delivery;</p> <p>5.3.4. Are clearly escalated from a Level 2 to a Level 1 deduction;</p> <p>5.3.5. Clearly incentivise the Tenderer to provide a remedy plan that is agreed as a matter of urgency;</p>					
	<p>5.4. The Tenderer's solution includes deductions that:</p> <p>5.4.1. Are mapped to the procedures and deliverables in the Audit Criteria in Schedule 13;</p> <p>5.4.2. Are clearly escalated from a Level 2 to a Level 1 deduction;</p>					
	5.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.					

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6.	<p>6.1. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will deliver performance management in this Contract including:</p> <p>6.1.1. How the Tenderer will implement the Performance Monitoring System in part 3 of Schedule 12 by:</p> <p>6.1.1.1. Housing the KPIs on the Performance Monitoring System (PMS) in accordance with paragraph 15.4 of Schedule 12;</p> <p>6.1.1.2. Conducting weekly reviews of the PMS to ensure that any indication of a drop in performance is identified early;</p> <p>6.1.1.3. Analysing any indications of performance drops and making the necessary adjustments to ensure satisfactory performance is maintained;</p> <p>6.1.1.4. Analysing all data on the PMS to provide a holistic and systematic approach to managing performance;</p> <p>6.1.1.5. Liaising with the Authority to adjust any source data in order to best provide management information for performance measurement;</p> <p>6.1.1.6. Collecting performance data from a variety of areas in order to feed the PMS;</p> <p>6.1.1.7. Pushing performance measurements and analysis to the Authority in order to ensure satisfactory performance is maintained holistically across this Contract;</p> <p>6.1.1.8. Providing an easy to read but comprehensive Performance Register that provides real time performance information, including decisions and actions to manage performance in accordance with paragraph 20.1 of Schedule 12;</p> <p>6.1.1.9. Providing a process to report PI or KPI failures to the Level 3 Chairman immediately including an in-depth report on actions taken to rectify the failure;</p> <p>6.1.1.10. Providing summaries of progress against Remedy Plans and performance management to the governance boards in accordance with Schedule 3;</p> <p>6.1.2. How the Tenderer will provide Authority with a service desk to raise performance issues by:</p> <p>6.1.2.1. Providing a clear and easy to use system for the Authority to access the service desk at all times in this Contract;</p> <p>6.1.2.2. Recording and analysing all comments made and responding to those comments in a time period that shows the Tenderer is reacting to issues early;</p> <p>6.1.2.3. Collaboratively working with the Authority to identify actions to take to remedy any issues;</p> <p>6.1.2.4. Conducting trend analysis to identify any areas of Training Services that may not be functioning adequately;</p> <p>6.1.2.5. Feeding management information from the service desk to the PMS for a holistic view on performance,</p> <p>6.1.2.6. Using service desk reports to directly inform KPI performance;</p>	x				
	<p>6.2. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will deliver performance management in this Contract including:</p> <p>6.2.1. How the Tenderer will implement the Performance Monitoring System in part 3 of Schedule 12 by:</p> <p>6.2.1.1. Housing the KPIs on the Performance Monitoring System (PMS) in accordance with paragraph 15.4 of Schedule 12;</p> <p>6.2.1.2. Conducting regular reviews of the PMS to ensure that any indication of a drop in performance is</p>	x				

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	<p>identified;</p> <p>6.2.1.3. Analysing any indications of performance drops and recommending actions to the PCWG;</p> <p>6.2.1.4. Collecting performance data from a variety of areas in order to feed the PMS;</p> <p>6.2.1.5. Pushing performance measurements and analysis to the Authority in order to ensure satisfactory performance is maintained holistically across this Contract;</p> <p>6.2.1.6. Providing an easy to read but comprehensive Performance Register that provides performance information, including decisions and actions to manage performance in accordance with paragraph 20.1 of Schedule 12;</p> <p>6.2.1.7. Providing a process to report PI or KPI failures to the Level 3 Chairman immediately including a report on actions taken to rectify the failure;</p> <p>6.2.1.8. Providing summaries of progress against Remedy Plans and performance management to the governance boards in accordance with Schedule 3;</p> <p>6.2.2. How the Tenderer will provide Authority with a service desk to raise performance issues by:</p> <p>6.2.2.1. Providing a clear and easy to use system for the Authority to access the service desk in this Contract;</p> <p>6.2.2.2. Recording and analysing all comments made and responding to those comments in a time period that shows the Tenderer is reacting to issues early;</p> <p>6.2.2.3. Collaboratively working with the Authority to identify actions to take to remedy any issues;</p> <p>6.2.2.4. Feeding management information from the service desk to the PMS for a holistic view on performance,</p>					
	<p>6.3. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will deliver performance management in this Contract including:</p> <p>6.3.1. How the Tenderer will implement the Performance Monitoring System in part 3 of Schedule 12 by:</p> <p>6.3.1.1. Housing the KPIs on the Performance Monitoring System (PMS) in accordance with paragraph 15.4 of Schedule 12;</p> <p>6.3.1.2. Conducting periodical reviews of the PMS;</p> <p>6.3.1.3. Analysing any indications of performance drops and recommending actions to the PCWG;</p> <p>6.3.1.4. reporting to the Authority as required in order to ensure satisfactory performance is maintained;</p> <p>6.3.1.5. Providing a Performance Register that provides performance information in accordance with paragraph 20.1 of Schedule 12;</p> <p>6.3.1.6. Providing a process to report PI or KPI failures to the Level 3 Chairman expediently;</p> <p>6.3.1.7. Providing summaries of progress against Remedy Plans and performance management to the governance boards in accordance with Schedule 3;</p> <p>6.3.2. How the Tenderer will provide Authority with a service desk to raise performance issues by:</p> <p>6.3.2.1. Providing a system for the Authority to access the service desk in this Contract;</p> <p>6.3.2.2. Recording and analysing all comments made and reporting actions to the PCWG;</p>			x		
	<p>6.4. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will deliver performance management in this Contract including:</p> <p>6.4.1. How the Tenderer will implement the Performance Monitoring System in part 3 of Schedule 12 by:</p>				x	

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	<p>6.4.1.1. Housing the KPIs on the Performance Monitoring System (PMS) in accordance with paragraph 15.4 of Schedule 12;</p> <p>6.4.1.2. Providing a Performance Register that provides performance information in accordance with paragraph 20.1 of Schedule 12;</p> <p>6.4.1.3. Reporting PI or KPI failures to the Level 3 Chairman expediently;</p> <p>6.4.1.4. Providing summaries of progress against Remedy Plans and performance management to the governance boards in accordance with Schedule 3;</p> <p>6.4.2. How the Tenderer will provide Authority with a service desk to raise performance issues by providing a system for the Authority to access the service desk in this Contract;</p>					
	6.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.					x
7.	<p>7.1. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will support the Authority's audit process in this Contract in accordance with Schedule 13 including:</p> <p>7.1.1. How the Tenderer will identify all of the necessary procedures and deliverable documents;</p> <p>7.1.2. How the Tenderer will work collaboratively with the Authority to monitor the Audit Schedule in Schedule 13, and provide the necessary deliverable documents early;</p> <p>7.1.3. How the Tenderer will demonstrate the relevant procedures and interactions in the documents to the Authority during the Audit;</p> <p>7.1.4. How the Tenderer will provide all evidence required by the Auditor in order to achieve a result of Good Practice;</p> <p>7.1.5. How the Tenderer will report and record audit results by:</p> <p>7.1.5.1. Providing a clear and easy to understand method of displaying audit results, including actions and decisions on the PMS;</p> <p>7.1.5.2. Conducting an internal analysis of the audit results in order to continuously improve procedures in time for the next audit;</p> <p>7.1.5.3. Taking immediate action against any observations to ensure that Satisfactory Performance is maintained;</p> <p>7.1.5.4. Analysing all observations to ensure that all lessons learned are identified and actions are taken in all areas of delivery of the Training Services to ensure observations are avoided in subsequent audits;</p> <p>7.1.5.5. Recording all evidence provided or required in each audit so that the procedure can be facilitated better in subsequent audits;</p> <p>7.1.5.6. Providing a clear process for tracking and recording activities against any remedy plans in order to report progress to the governance boards;</p> <p>7.1.5.7. Conducting holistic analysis of remedy plans to provide lessons learned to future remedy activities;</p> <p>7.1.5.8. Monitoring and record all good practice results in order to provide evidence for Extension Performance Indicators as part of Schedule 10 Options to Extend;</p> <p>7.1.5.9. Conducting holistic analysis of all good practice results in order to ensure high quality provision of Training Services across the whole of this Contract;</p>	x				

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	<p>7.2. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will support the Authority's audit process in this Contract in accordance with Schedule 13 including:</p> <p>7.2.1. How the Tenderer will identify the necessary procedures and deliverable documents;</p> <p>7.2.2. How the Tenderer will demonstrate the relevant procedures and interactions in the documents to the Authority during the Audit;</p> <p>7.2.3. How the Tenderer will provide all evidence required by the Auditor in order to achieve a result of Good Practice;</p> <p>7.2.4. How the Tenderer will report and record audit results by:</p> <p>7.2.4.1. Providing a method of displaying audit results, including actions and decisions on the PMS;</p> <p>7.2.4.2. Taking immediate action against any observations to ensure that Satisfactory Performance is maintained;</p> <p>7.2.4.3. Analysing observations to ensure that lessons learned are identified;</p> <p>7.2.4.4. Providing a clear process for tracking and recording activities against any remedy plans in order to report progress to the governance boards;</p> <p>7.2.4.5. Monitoring and record all good practice results in order to provide evidence for Extension Performance Indicators as part of Schedule 10 Options to Extend;</p>		x			
	<p>7.3. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will support the Authority's audit process in this Contract in accordance with Schedule 13 including:</p> <p>7.3.1. How the Tenderer will identify the necessary procedures and deliverable documents;</p> <p>7.3.2. How the Tenderer will report and record audit results by:</p> <p>7.3.2.1. Providing a method of displaying audit results, including actions and decisions on the PMS;</p> <p>7.3.2.2. Taking immediate action against any observations to ensure that Satisfactory Performance is maintained;</p> <p>7.3.2.3. Providing a clear process for tracking and recording activities against any remedy plans in order to report progress to the governance boards;</p> <p>7.3.2.4. Monitoring and record all good practice results in order to provide evidence for Extension Performance Indicators as part of Schedule 10 Options to Extend;</p>			x		
	<p>7.4. The Tenderer's Training Services Management Plan for Part 13 (Performance Management) of Schedule 14 details how the Tenderer will support the Authority's audit process in this Contract in accordance with Schedule 13 including:</p> <p>7.4.1. How the Tenderer will identify the necessary procedures and deliverable documents;</p> <p>7.4.2. How the Tenderer will report and record audit results.</p>				x	
	<p>7.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x

RoR: 4

QUALITY MANAGEMENT SYSTEM

Aim

To select a Tenderer who will ensure the required standards of training that are relevant, current and fit for purpose are delivered under the auspices of an ISO 9001 QMS.

Background

The Tenderer will operate within a Quality Management System (QMS) that meets the ISO 9001 standard. This responsibility extends to the Tenderers' subcontractors.

The requirement for this area is defined in:

- POTS Schedule 32 Quality Plan
- ISO 9001
- Terms and Conditions of Contract Clauses 81 & 82

Note that the assurance of training is assessed by ROR 15.

Responses Required:

Provide a Draft Quality Plan and demonstrate how your Quality Management System will be employed to ensure levels of quality will be maintained

- a. In delivering the services under this Contract;
- b. satisfying the Authority that adequate controls exist to manage the delivery of the Training Services to the required performance and standards specified in this Contract; and
- c. synchronising of Contractor and Authority quality processes.
- d. maintains the Quality management throughout the supply chain for this contract.

Explain the responsibilities, qualifications and experience of the key roles in your organisation that will support this aspect of your solution.

RoR: 4

QUALITY MANAGEMENT SYSTEM

Guidance for Evaluators

Mark	Criteria
Acceptable	<p>In the Authority's opinion all of the following statements are true:</p> <ol style="list-style-type: none"> 1. The Tenderer's QMS is or will be ISO 9001 compliant by SCD 2. Comprehensive Quality Plan supplied covering points a-d above. 3. Suitably Qualified and Experienced Personnel (SQEP) will be assigned to all QA activities and referred to in Schedule 29 4. The approach to QA is consistent for all activities related to this contract and no areas are omitted. 5. Adequate controls exist to manage the delivery of the Training Services to the required performance and standards specified in this Contract 6. Recognition of the need and importance of a Management Training System and DSAT QMS 7. There is a mechanism in place to ensure and assure that the supply chain employs a suitable quality assurance process and personnel 8. The Tenderer has or will establish audit rights over all of their subcontractors.
Unacceptable	1 or more criteria 1-8 above have not been met.

RoR: 5

SECURITY

Aim

To select a Tenderer that will adhere to MOD security policy (as defined in Clause 58, Schedule 25 Security Clearance, the Security Aspects letter, Security Policy Framework and Annex I of Schedule 2 Statement of Requirements) in all respects.

Background

The MOD is subject to threats from espionage, sabotage, subversion, terrorism and crime. To counter these, the MOD has established a range of security regulations and procedures with which Contractors are required to comply. Security is the responsibility of all individuals on MOD sites and Contractors are required to have a disciplinary system to make sure that action can be taken against any member of staff who fails to comply with security regulations or orders. As well as supporting the security of physical sites and personnel, the Tenderer will need to be competent in the areas of information security and cyber security.

Responses Required:

Explain the responsibilities, qualifications and experience of the key roles in your organisation that will ensure adherence to MOD security policy.

Describe how your organisation will approach security in fulfilling this contract and how it will communicate this approach to its employees and sub-contractors.

Explain how your organisation will handle security breaches.

Describe your proposals for ensuring that personnel and sub-contractors will be appropriately security cleared and the maintenance of clearances.

RoR: 5

SECURITY

Guidance for Evaluators

Mark	Evaluation Criteria
Acceptable	<p>In the Authority's opinion all of the following statements are true:</p> <ol style="list-style-type: none"> 1. Suitably Qualified and Experienced Personnel (SQEP) will be assigned as a Security officer to ensure and assure adherence to MOD security policy. 2. The Tenderer's approach to security is in accordance with the documents listed above for all activities related to this contract both at Government Establishments and at the Contractor's premises. 3. The Tenderer will provide and use a mechanism to ensure and assure that the importance of adherence to MOD security policy is understood throughout the Tenderer's organisation and sub-contractors. 4. The Tenderer will provide and use a mechanism to ensure and assure that any security breaches are dealt with correctly. 5. The Tenderer has provided assurance that all personnel and sub-contractors will be appropriately security cleared necessary to fulfill their role.
Unacceptable	<p>In the Authority's opinion the criteria under which the score above will be awarded have not been met.</p>

RoR: 6

Change and Change Management

Aim

1. To select a solution that will deliver change and change management in this Contract.

Background

2. This RoR covers the requirement of the Tenderer to deliver change and change management in this Contract.
3. The requirement for this area is defined in:
 - 3.1. Schedule 2 (Statement of Requirements)
 - 3.2. Schedule 3 (Governance and Contract Management)
 - 3.3. Schedule 4 (Change and Change Management)
 - 3.4. Schedule 11 (Key Personnel)
 - 3.5. Schedule 12 (Performance Mechanism)
 - 3.6. Schedule 13 (Authority Audit)

Responses Required:

4. The Tenderer will provide details of its Key Personnel for Schedule 29 including:
 - 4.1.1. how the Key Personnel will be employed in delivering and managing change in accordance with Schedule 4;
 - 4.1.2. the SQEP details of its Key Personnel; and
 - 4.1.3. a description of how the Key Personnel fit into the organogram provided in Schedule 11.
5. The Tenderer will provide a Training Services Management Plan for part 12 of Schedule 9 detailing how the Tenderer will deliver change and change management including:
 - 5.1. How the Tenderer will manage the Annual Change in accordance with part 3 to Schedule 4 in association with the requirements and responses to RoR 13 and Annex C to Schedule 2;
 - 5.2. How the Tenderer will manage In Year Change in accordance with part 4 of Schedule 4 including:
 - 5.2.1. How the Tenderer will track the In Year Change Envelope and manage an In Year Change Register in accordance with paragraph 6.3.2 of Schedule 4;
 - 5.2.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors;
 - 5.2.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to plan for short notice changes;
 - 5.2.4. How the Tenderer will provide In Year Change data to the governance boards and meetings in accordance with Schedule 3;

- 5.3. How the Tenderer will manage UOTRs in accordance with part 5 of Schedule 4 including:
 - 5.3.1. How the Tenderer will manage the UOTR Change Register in accordance with paragraph 8.3 in Schedule 4;
 - 5.3.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors;
 - 5.3.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to plan for short notice changes;
 - 5.3.4. How the Tenderer will integrate with the requirements and responses in RoR 10 to design the training;
- 5.4. How the tenderer will manage Training Optimisation changes in accordance with part 7 of Schedule 4 including:
 - 5.4.1. How the Tenderer will work collaboratively with the Authority to identify the most appropriate method for implementing a Training Optimisation change;
 - 5.4.2. How the Tenderer will integrate with the requirements and responses in RoR 7 to deliver Training Optimisation;
 - 5.4.3. How the Tenderer will track and manage all Training Optimisation changes;
- 5.5. How the tenderer will manage Exceptional Change in accordance with part 8 of Schedule 4 including:
 - 5.5.1. How the Tenderer will manage and track Exceptional Change requests;
 - 5.5.2. How the Tenderer will develop accurate proposals for implementing the Exceptional Change;
 - 5.5.3. How the Tenderer will manage the implementation of the Exceptional Change, including the amendment to this Contract;

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1.1. The Tenderer’s solution will deliver continued compliance with all standards and address all constraints.</p> <p>1.2. The Tenderer’s solution identifies Key Personnel to deliver change and change management for Schedule 11 (Key Personnel).</p> <p>1.3. The Tenderer’s solution delivers change and change management with no detrimental effect or risk to the delivery of the Training Services.</p> <p>1.4. The Tenderer’s solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism).</p>	In the Authority’s opinion all of the statements on the left are true				x
2.	<p>KEY STATEMENTS</p> <p>2.1. The Tenderer’s list of Key Personnel delivering change and change management in Schedule 11 details how the Tenderer will:</p> <p>2.1.1. Provide substantial management oversight of change and change management to ensure that this Contract is managed in a flexible manner to deliver the Training Services;</p> <p>2.1.2. Provide a collaborative working approach to change and change management in this Contract by ensuring that personnel employed to manage change:</p> <p>2.1.2.1. have a proven track record of substantial and current experience in delivering change in training delivery and education environments;</p> <p>2.1.2.2. have a proven track record of managing a team of high quality and dynamic personnel to deliver a continuously adapting requirement;</p> <p>2.1.2.3. have a proven track record of providing innovative solutions to problems;</p> <p>2.1.2.4. have proven excellence in forming and managing relationships in order to deliver an output;</p>	x				
	<p>2.2. The Tenderer’s list of Key Personnel delivering change and change management in Schedule 11 details how the Tenderer will:</p> <p>2.2.1. Provide management oversight of change and change management to ensure that this Contract is managed in a flexible manner to deliver the Training Services;</p> <p>2.2.2. Provide a collaborative working approach to change and change management in this Contract by ensuring that personnel employed to manage change:</p>		x			

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	<p>2.2.2.1. have a proven track record of experience in delivering change in training delivery and education environments;</p> <p>2.2.2.2. have a proven track record of managing a team to deliver a continuously adapting requirement;</p> <p>2.2.2.3. have proven excellence in forming and managing relationships in order to deliver an output;</p>					
	<p>2.3. The Tenderer's list of Key Personnel delivering change and change management in Schedule 11 details how the Tenderer will:</p> <p>2.3.1. Provide management oversight of change and change management to ensure that this Contract is managed in a flexible manner to deliver the Training Services;</p> <p>2.3.2. Provide a collaborative working approach to change and change management in this Contract by ensuring that personnel employed to manage change:</p> <p>2.3.2.1. have experience in delivering change in contracts;</p> <p>2.3.2.2. have experience of managing a team to deliver change;</p> <p>2.3.2.3. have experience in forming and managing relationships in order to deliver an output;</p>			x		
	<p>2.4. The Tenderer's list of Key Personnel delivering change and change management in Schedule 11 details how the Tenderer will:</p> <p>2.4.1. Provide management oversight of change and change management to ensure that this Contract is managed in a flexible manner to deliver the Training Services;</p> <p>2.4.2. Provide a collaborative working approach to change and change management in this Contract.</p>				x	
	<p>2.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
3.	<p>3.1. The Tenderer's Training Services Management Plan details how the Tenderer will manage Annual Change in accordance with part 3 of Schedule 4 including:</p> <p>3.1.1. How the Tenderer will work collaboratively with the authority to conduct Quality Assurance of the SOTR by:</p> <p>3.1.1.1. ensuring that the details of the SOTR accurately reflect the training documentation system for each course;</p> <p>3.1.1.2. ensuring that any new courses resulting from Training Design activities in Annex C to Schedule 2 are accurately reflected in the SOTR;</p> <p>3.1.1.3. ensuring that outturn data is accurately recorded in the SOTR against each course;</p> <p>3.1.1.4. working collaboratively with the Authority to identify any additional information that is required to assist in populating the SOTR;</p> <p>3.1.1.5. working collaboratively with the Authority to provide SME advise on course planning in order to support the SOTR population process;</p> <p>3.1.2. How the Tenderer will ensure that Military Manning Assumptions (MMAs) are accurately recorded for production of the SOTT+ in accordance with paragraph 4 of Schedule 4 by:</p> <p>3.1.2.1. Working collaboratively with the Authority to ensure that the Unit Establishment List (UEL) for each Establishment is accurate;</p> <p>3.1.2.2. identifying military personnel that are used to deliver the SOTT against the UEL;</p> <p>3.1.2.3. working collaboratively with the Authority to ensure the MMAs are accurate and clearly reflect the UEL and the SQEP requirement;</p>			x		

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	<p>3.1.2.4. identifying any SQEP shortfalls to the Authority for any Military Instructor included in the UEL and advising on the process to ensure compliance with Annex C of Schedule 2 and JSP 822;</p> <p>3.1.3. How the Tenderer will produce a fully resourced SOTT in accordance with Schedule 4 by:</p> <p>3.1.3.1. Working collaboratively with the Establishments to identify accurate assumptions in the production of the SOTT;</p> <p>3.1.3.2. Working collaboratively with the authority to identify any shortfalls and making recommendations on how to overcome these in the most efficient and effective manner;</p> <p>3.1.3.3. Identifying spare capacity to ensure flexibility remains in the SOTT in order to deal with In Year Change and UOTR requirements;</p> <p>3.1.3.4. Clearly identifying to the Authority all of the necessary resource to deliver the SOTT;</p> <p>3.1.3.5. Working collaboratively with the Authority to manage configuration control of the Annual Change process;</p> <p>3.1.4. How the Tenderer will produce an Annual Change Report in accordance with Schedule 4 by:</p> <p>3.1.4.1. working collaboratively with the Authority by providing all necessary data and additional information to agree the Annual Change Report;</p> <p>3.1.4.2. producing the SOTT+ containing all contractual information from the Annual Change Report;</p> <p>3.1.4.3. working collaboratively with the Authority to advise on how change in this Contract impacts the SOTT+ and how the Authority should therefore manage change in order to operate efficiently;</p> <p>3.1.5. How the Tenderer will work collaboratively with the Authority to track and manage the strategic effects of each Annual Change by:</p> <p>3.1.5.1. Conducting horizon scanning to identify large fluctuations in volumes of training;</p> <p>3.1.5.2. Identifying any issues that may cause Annual Change to exceed the designated thresholds in Schedule 7;</p> <p>3.1.5.3. Conducting trend analysis of outturn and resource usage statistics in order to challenge the requirement and deliver a more efficient annual change process as part of Training Optimisation in accordance with Annex G to Schedule 2.</p> <p>3.1.6. How the Tenderer will Managing training requirements outside of the Annual Change deadlines in order to provide flexibility to the Authority;</p>					
	<p>3.2. The Tenderer's Training Services Management Plan details how the Tenderer will manage Annual Change in accordance with part 3 of Schedule 4 including:</p> <p>3.2.1. How the Tenderer will work collaboratively with the authority to conduct Quality Assurance of the SOTR by:</p> <p>3.2.1.1. ensuring that the details of the SOTR accurately reflect the training documentation system for each course;</p> <p>3.2.1.2. ensuring that any new courses resulting from Training Design activities in Annex C to Schedule 2 are accurately reflected in the SOTR;</p> <p>3.2.2. How the Tenderer will ensure that Military Manning Assumptions (MMAs) are accurately recorded for production of the SOTT+ in accordance with paragraph 4 of Schedule 4 by identifying military personnel that are used to deliver the SOTT against the UEL;</p> <p>3.2.3. How the Tenderer will produce a fully resourced SOTT in accordance with Schedule 4 by:</p> <p>3.2.3.1. Working collaboratively with the Establishments to identify accurate assumptions in the production</p>		x			

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	<p>of the SOTT;</p> <p>3.2.3.2. Clearly identifying to the Authority all of the necessary resource to deliver the SOTT;</p> <p>3.2.3.3. Working collaboratively with the Authority to manage configuration control of the SOTT and SOTT+ process;</p> <p>3.2.4. How the Tenderer will produce an Annual Change Report in accordance with Schedule 4 by:</p> <p>3.2.4.1. producing the SOTT+ containing all contractual information from the Annual Change Report;</p> <p>3.2.4.2. working collaboratively with the Authority to advise on how change in this Contract impacts the SOTT+ and how the Authority should therefore manage change in order to operate efficiently;</p> <p>3.2.5. How the Tenderer will work collaboratively with the Authority to track and manage the strategic effects of each Annual Change by conducting trend analysis of outturn and resource usage statistics in order to challenge the requirement and deliver a more efficient annual change process as part of Training Optimisation in accordance with Annex G to Schedule 2.</p> <p>3.2.6. How the Tenderer will Managing training requirements outside of the Annual Change deadlines in order to provide flexibility to the Authority;</p>					
	<p>3.3. The Tenderer's Training Services Management Plan details how the Tenderer will manage Annual Change in accordance with part 3 of Schedule 4 including:</p> <p>3.3.1. How the Tenderer will work collaboratively with the authority to conduct Quality Assurance of the SOTR;</p> <p>3.3.2. How the Tenderer will ensure that Military Manning Assumptions (MMAs) are accurately recorded for production of the SOTT+ in accordance with paragraph 4 of Schedule 4 by identifying military personnel that are used to deliver the SOTT against the UEL;</p> <p>3.3.3. How the Tenderer will produce a fully resourced SOTT in accordance with Schedule 4 by:</p> <p>3.3.3.1. Working collaboratively with the Establishments to identify accurate assumptions in the production of the SOTT;</p> <p>3.3.3.2. Clearly identifying to the Authority all of the necessary resource to deliver the SOTT;</p> <p>3.3.4. How the Tenderer will produce an Annual Change Report in accordance with Schedule 4 by producing the SOTT+ containing all contractual information from the Annual Change Report;</p> <p>3.3.5. How the Tenderer will work collaboratively with the Authority to track and manage the strategic effects of each Annual Change by providing information for Training Optimisation in accordance with Annex G to Schedule 2.</p> <p>3.3.6. How the Tenderer will Manage training requirements outside of the Annual Change deadlines;</p>			x		
	<p>3.4. The Tenderer's Training Services Management Plan details how the Tenderer will manage Annual Change in accordance with part 3 of Schedule 4 including:</p> <p>3.4.1. How the Tenderer will ensure that Military Manning Assumptions (MMAs) are accurately recorded for production of the SOTT+ in accordance with paragraph 4 of Schedule 4;</p> <p>3.4.2. How the Tenderer will produce a fully resourced SOTT in accordance with Schedule 4;</p> <p>3.4.3. How the Tenderer will produce an Annual Change Report in accordance with Schedule 4;</p> <p>3.4.4. How the Tenderer will Manage training requirements outside of the Annual Change deadlines;</p>				x	
	<p>3.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
4.	<p>4.1. The Tenderer's Training Services Management Plan details how the Tenderer will manage In Year Change in</p>	x				

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	<p>accordance with part 4 of Schedule 4 including:</p> <p>4.1.1. How the Tenderer will track the In Year Change Envelope and manage an In Year Change Register in accordance with paragraph 6.3.2 of Schedule 4 by:</p> <p>4.1.1.1. Working collaboratively with the Authority to identify the causes of In Year Change in order to reduce the amount of change being delivered in this Contract;</p> <p>4.1.1.2. Identifying the In Year Change envelope against the Annual Change;</p> <p>4.1.1.3. Working collaboratively with the Authority to identify suitable thresholds for each Establishment In Year Change delegation based on trend analysis of In Year Change usage;</p> <p>4.1.1.4. Providing the Authority with a clear process for managing the total In Year Change Envelope in addition to individual Establishment allocations;</p> <p>4.1.1.5. Receiving and implementing In Year Changes within a timeframe that provides the Authority with a high degree of flexibility to veer and haul its training as required;</p> <p>4.1.1.6. Producing and maintaining an In Year Change Register that clearly identifies the individual Establishment usage as real time information;</p> <p>4.1.1.7. Providing the authority with accurate; full and comprehensive management information on In Year Change in this Contract;</p> <p>4.1.2. How the Tenderer will integrate fully with the requirements and responses in RoR 9 to deliver SQEP instructors by ensuring that there is suitable flexibility in allocation of instructors to enable short notice In Year Changes to be delivered;</p> <p>4.1.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to by:</p> <p>4.1.3.1. ensuring that there is suitable flexibility in the allocation of resources to enable short notice planning changes;</p> <p>4.1.3.2. Utilising the management information available to forecast expected changes and ensure flexibility to deliver these;</p> <p>4.1.3.3. Fully integrating with Training Optimisation to identify the most efficient method of planning for short notice changes to requirements;</p> <p>4.1.4. How the Tenderer will provide In Year Change data to the governance boards and meetings in accordance with Schedule 3;</p> <p>4.1.4.1. Providing the Authority with clear and accurate information on historic, current and projected In Year Change activity against each individual course in the SOTR;</p> <p>4.1.4.2. Working collaboratively with the Authority to determine training requirements against the In Year Change activities in this Contract;</p> <p>4.1.4.3. Fully integrating with Training Optimisation to identify the most efficient method of managing In Year Change against SOTR forecasts and outturn data;</p> <p>4.1.4.4. Providing financial information on the actual cost of In Year Change to the Authority from additional requirements or cancellations across all resources used to deliver the training;</p>					
	<p>4.2. The Tenderer's Training Services Management Plan details how the Tenderer will manage In Year Change in accordance with part 4 of Schedule 4 including:</p> <p>4.2.1. How the Tenderer will track the In Year Change Envelope and manage an In Year Change Register in accordance with paragraph 6.3.2 of Schedule 4 by:</p>		x			

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	<p>4.2.1.1. Identifying the In Year Change envelope against the Annual Change;</p> <p>4.2.1.2. Working collaboratively with the Authority to identify suitable thresholds for each Establishment In Year Change delegation;</p> <p>4.2.1.3. Receiving and implementing In Year Changes within a timeframe that provides the Authority with a degree of flexibility to veer and haul its training as required;</p> <p>4.2.1.4. Producing and maintaining an In Year Change Register that clearly identifies the individual Establishment usage as real time information;</p> <p>4.2.1.5. Providing the authority with accurate management information on In Year Change in this Contract;</p> <p>4.2.2. How the Tenderer will integrate fully with the requirements and responses in RoR 9 to deliver SQEP instructors by ensuring that there is suitable flexibility in allocation of instructors to enable In Year Changes to be delivered;</p> <p>4.2.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to by:</p> <p>4.2.3.1. ensuring that there is suitable flexibility in the allocation of resources to enable planning changes;</p> <p>4.2.3.2. integrating with Training Optimisation to identify the most efficient method of planning for changes to requirements;</p> <p>4.2.4. How the Tenderer will provide In Year Change data to the governance boards and meetings in accordance with Schedule 3 by:</p> <p>4.2.4.1. Providing the Authority with information on historic and current In Year Change activity in the SOTR;</p> <p>4.2.4.2. integrating with Training Optimisation to identify the most efficient method of managing In Year Change against SOTR forecasts and outturn data;</p>					
	<p>4.3. The Tenderer's Training Services Management Plan details how the Tenderer will manage In Year Change in accordance with part 4 of Schedule 4 including:</p> <p>4.3.1. How the Tenderer will track the In Year Change Envelope and manage an In Year Change Register in accordance with paragraph 6.3.2 of Schedule 4 by:</p> <p>4.3.1.1. Identifying the In Year Change envelope against the Annual Change;</p> <p>4.3.1.2. Receiving and implementing In Year Changes;</p> <p>4.3.1.3. Producing and maintaining an In Year Change Register that identifies the individual Establishment usage;</p> <p>4.3.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors to enable In Year Changes to be delivered;</p> <p>4.3.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to by:</p> <p>4.3.3.1. Allocating resources to enable planning changes;</p> <p>4.3.3.2. integrating with Training Optimisation for changes to requirements;</p> <p>4.3.4. How the Tenderer will provide In Year Change data to the governance boards and meetings in accordance with Schedule 3 by providing the Authority with information on In Year Change activity in the SOTR;</p>			x		
	<p>4.4. The Tenderer's Training Services Management Plan details how the Tenderer will manage In Year Change in accordance with part 4 of Schedule 4 including:</p> <p>4.4.1. How the Tenderer will track the In Year Change Envelope and manage an In Year Change Register in accordance with paragraph 6.3.2 of Schedule 4</p>				x	

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	<p>4.4.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors;</p> <p>4.4.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to by allocating resources to deliver the In Year Change;</p> <p>4.4.4. How the Tenderer will provide In Year Change data to the governance boards and meetings in accordance with Schedule 3;</p>					
	4.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
5.	<p>5.1. The Tenderer's Training Services Management Plan details how the Tenderer will manage UOTRs in accordance with part 5 of Schedule 4 including:</p> <p>5.1.1. How the Tenderer will produce and manage a UOTR Change Register in accordance with paragraph 8.3 in Schedule 4 by:</p> <p>5.1.1.1. Documenting all UOTR Requests for each Training Year;</p> <p>5.1.1.2. Detailing the required information in each change request and how this relates to the management of a UOTR;</p> <p>5.1.1.3. Working collaboratively with the Authority to identify the required information for the UOTR to ensure that it is delivered expediently;</p> <p>5.1.1.4. Monitoring the UOTR thresholds and working collaboratively with the Authority to identify if the threshold is adequate and appropriate;</p> <p>5.1.1.5. Conducting horizon scanning to pre-empt any UOTR request particularly if the threshold is near limits;</p> <p>5.1.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors by:</p> <p>5.1.2.1. Working collaboratively with the Authority to identify the SQEP requirements of the UOTR at the earliest possible opportunity;</p> <p>5.1.2.2. Managing SQEP requirements in Annex B to Schedule 2 in a manner that provides flexibility to meet short notice operational requirements whilst maintaining an efficient delivery solution;</p> <p>5.1.2.3. Managing the use of non-SQEP instructors in accordance with paragraph 8.5.1 of Schedule 4;</p> <p>5.1.2.4. Managing the delivery of business as usual training delivery to ensure that the most cost effective means of delivering the UOTR is identified with no risk to delivery of the Training Services;</p> <p>5.1.2.5. Ensuring lessons are captured from delivery of UOTR and fed into continuously improve the process;</p> <p>5.1.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to plan for short notice changes by:</p> <p>5.1.3.1. Working collaboratively with the Authority to identify potential re-scheduling of business as usual training in order to deliver the UOTR;</p> <p>5.1.3.2. Managing the delivery of training support to business as usual to ensure that the most cost effective means of delivering the UOTR is identified with no risk to delivery of the Training Services;</p> <p>5.1.4. How the Tenderer will integrate with the requirements and responses in RoR 10 to design the training by:</p> <p>5.1.4.1. Producing a document system for all UOTRs;</p> <p>5.1.4.2. Ensuring any enduring requirement from a UOTR is captured in the SOTT+ in accordance with paragraph 8.6.4 in Schedule 4;</p>					x

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	<p>5.1.4.3. Ensuring that the UOTR is delivered and supported in accordance with the requirements in Annexes B and C of Schedule 2;</p> <p>5.1.4.4. Working collaboratively with the authority to expediently produce any Exceptional Change requests if required against the provisions of Schedule 4;</p>					
	<p>5.2. The Tenderer's Training Services Management Plan details how the Tenderer will manage UOTRs in accordance with part 5 of Schedule 4 including:</p> <p>5.2.1. How the Tenderer will produce and manage a UOTR Change Register in accordance with paragraph 8.3 in Schedule 4 by:</p> <p>5.2.1.1. Documenting all UOTR Requests for each Training Year;</p> <p>5.2.1.2. Working collaboratively with the Authority to identify the required information for the UOTR to ensure that it is delivered expediently;</p> <p>5.2.1.3. Monitoring the UOTR thresholds and working collaboratively with the Authority to identify if the threshold is adequate and appropriate;</p> <p>5.2.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors by:</p> <p>5.2.2.1. Working collaboratively with the Authority to identify the SQEP requirements of the UOTR at the earliest possible opportunity;</p> <p>5.2.2.2. Managing SQEP requirements in Annex B to Schedule 2 in a manner that provides flexibility to meet short notice operational requirements whilst maintaining an efficient delivery solution;</p> <p>5.2.2.3. Managing the use of non-SQEP instructors in accordance with paragraph 8.5.1 of Schedule 4;</p> <p>5.2.2.4. Managing the delivery of business as usual training delivery to ensure that there is no risk to delivery of the Training Services;</p> <p>5.2.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to plan for short notice changes by working collaboratively with the Authority to identify potential re-scheduling of business as usual training in order to deliver the UOTR;</p> <p>5.2.4. How the Tenderer will integrate with the requirements and responses in RoR 10 to design the training by:</p> <p>5.2.4.1. Producing a document system for all UOTRs in accordance with Appendix 1 to Annex C of Schedule 2;</p> <p>5.2.4.2. Ensuring any enduring requirement from a UOTR is captured in the SOTT+ in accordance with paragraph 8.6.4 in Schedule 4;</p> <p>5.2.4.3. Ensuring that the UOTR is delivered and supported in accordance with the requirements in Annexes B and C of Schedule 2;</p>		x			
	<p>5.3. The Tenderer's Training Services Management Plan details how the Tenderer will manage UOTRs in accordance with part 5 of Schedule 4 including:</p> <p>5.3.1. How the Tenderer will produce and manage a UOTR Change Register in accordance with paragraph 8.3 in Schedule 4 by documenting all UOTR Requests for each Training Year;</p> <p>5.3.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors by:</p> <p>5.3.2.1. identifying the SQEP requirements of the UOTR;</p> <p>5.3.2.2. Managing the use of non-SQEP instructors in accordance with paragraph 8.5.1 of Schedule 4;</p> <p>5.3.2.3. Managing the delivery of business as usual training delivery to ensure that there is no risk to</p>			x		

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	<p>delivery of the Training Services;</p> <p>5.3.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to plan for short notice changes;</p> <p>5.3.4. How the Tenderer will integrate with the requirements and responses in RoR 10 to design the training by producing a document system for all UOTRs in accordance with Appendix 1 to Annex C of Schedule 2;</p> <p>5.3.5. Ensuring any enduring requirement from a UOTR is captured in the SOTT+ in accordance with paragraph 8.6.4 in Schedule 4;</p>					
	<p>5.4. The Tenderer's Training Services Management Plan details how the Tenderer will manage UOTRs in accordance with part 5 of Schedule 4 including:</p> <p>5.4.1. How the Tenderer will produce and manage a UOTR Change Register in accordance with paragraph 8.3 in Schedule 4;</p> <p>5.4.2. How the Tenderer will integrate with the requirements and responses in RoR 9 to deliver SQEP instructors;</p> <p>5.4.3. How the Tenderer will integrate with the requirements and responses in RoR 13 to plan for short notice changes;</p> <p>5.4.4. How the Tenderer will integrate with the requirements and responses in RoR 10 to design the training.</p>				x	
	<p>5.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
6.	<p>6.1. The Tenderer's Training Services Management Plan details how the tenderer will manage Training Optimisation changes in accordance with part 7 of Schedule 4 including:</p> <p>6.1.1. How the Tenderer will work collaboratively with the Authority to identify the most appropriate method for implementing a Training Optimisation change by:</p> <p>6.1.1.1. Analysing the current change profile in this Contract to identify if the change is likely to break any contractual thresholds;</p> <p>6.1.1.2. Identifying the SQEP requirement to plan, design and deliver the change;</p> <p>6.1.1.3. Providing all necessary data, information and evidence to the Authority in the form of an outline proposal in accordance with paragraph 12.2 of Schedule 4 to support the change;</p> <p>6.1.1.4. Working collaboratively with the Level 3 Change Manager and the Project Optimus Project Board to consider the outline proposal, providing SME advice and guidance as required;</p> <p>6.1.1.5. Producing additional data, information and evidence as required by the Authority in order to fully inform a decision to proceed with a full proposal in accordance with paragraph 12.2 of Schedule 4;</p> <p>6.1.1.6. Managing the production of a full proposal to ensure that all necessary information is included to produce a contract amendment if required;</p> <p>6.1.2. How the Tenderer will integrate with the requirements and responses in RoR 7 to deliver Training Optimisation;</p> <p>6.1.3. How the Tenderer will track and manage all Training Optimisation changes by:</p> <p>6.1.3.1. Monitoring the holistic benefits of all Training Optimisation changes in this Contract;</p> <p>6.1.3.2. Conducting an analysis on Training Optimisation changes against Exceptional and In Year Change in this Contract to identify the effects of Training Optimisation activities on the flexibility to deliver the Training Services;</p> <p>6.1.3.3. Providing an electronic method of viewing and tracking change activities that fully integrates with the</p>	x				

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	<p>6.1.3.4. Training Optimisation Programme in accordance with Annex G to Schedule 2 and clause 34; Analysing data on the efficiency and effectiveness of delivering the actual Training Optimisation change compared to that used in In Year Change and Exceptional Change procedures and making recommendations to the Authority from this analysis;</p>					
	<p>6.2. The Tenderer's Training Services Management Plan details how the tenderer will manage Training Optimisation changes in accordance with part 7 of Schedule 4 including:</p> <p>6.2.1. How the Tenderer will work collaboratively with the Authority to identify the most appropriate method for implementing a Training Optimisation change by:</p> <p>6.2.1.1. Analysing the current change profile in this Contract to identify if the change is likely to break any contractual thresholds;</p> <p>6.2.1.2. Providing all necessary data, information and evidence to the Authority in the form of an outline proposal in accordance with paragraph 12.2 of Schedule 4 to support the change;</p> <p>6.2.1.3. Working collaboratively with the Level 3 Change Manager and the Project Optimus Project Board to consider the outline proposal, providing SME advice and guidance as required;</p> <p>6.2.1.4. Managing the production of a full proposal to ensure that all necessary information is included to produce a contract amendment if required;</p> <p>6.2.2. How the Tenderer will integrate with the requirements and responses in RoR 7 to deliver Training Optimisation;</p> <p>6.2.3. How the Tenderer will track and manage all Training Optimisation changes by:</p> <p>6.2.3.1. Providing an electronic method of viewing and tracking change activities that fully integrates with the Training Optimisation Programme in accordance with Annex G to Schedule 2 and clause 34;</p> <p>6.2.3.2. Analysing data on the efficiency and effectiveness of delivering the actual Training Optimisation change;</p>		x			
	<p>6.3. The Tenderer's Training Services Management Plan details how the tenderer will manage Training Optimisation changes in accordance with part 7 of Schedule 4 including:</p> <p>6.3.1. How the Tenderer will work collaboratively with the Authority to identify the most appropriate method for implementing a Training Optimisation change by:</p> <p>6.3.1.1. Providing all necessary data, information and evidence to the Authority in the form of an outline proposal in accordance with paragraph 12.2 of Schedule 4 to support the change;</p> <p>6.3.1.2. Working collaboratively with the Level 3 Change Manager and the Project Optimus Project Board to consider the outline proposal, providing SME advice and guidance as required;</p> <p>6.3.2. How the Tenderer will integrate with the requirements and responses in RoR 7 to deliver Training Optimisation;</p> <p>6.3.3. How the Tenderer will track and manage all Training Optimisation changes by providing an electronic method of viewing and tracking change activities that integrates with the Training Optimisation Programme in accordance with Annex G to Schedule 2 and clause 34.</p>			x		
	<p>6.4. The Tenderer's Training Services Management Plan details how the tenderer will manage Training Optimisation changes in accordance with part 7 of Schedule 4 including:</p> <p>6.4.1. How the Tenderer will work collaboratively with the Authority to identify the most appropriate method for</p>				x	

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	<p>implementing a Training Optimisation change by providing an outline proposal in accordance with paragraph 12.2 of Schedule 4 to support the change;</p> <p>6.4.2. How the Tenderer will integrate with the requirements and responses in RoR 7 to deliver Training Optimisation;</p> <p>6.4.3. How the Tenderer will track and manage all Training Optimisation changes by providing an electronic method of viewing change activities.</p>					
	6.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.					x
7.	<p>7.1. The Tenderer's Training Services Management Plan details how the tenderer will manage Exceptional Change in accordance with part 8 of Schedule 4 including:</p> <p>7.1.1. How the Tenderer will manage and track Exceptional Change requests by:</p> <p>7.1.1.1. Providing an electronic method of viewing and tracking change activities that is accessible to the Authority at all times;</p> <p>7.1.1.2. Providing a holistic view of all Exceptional Change activity in this Contract and advising the Authority as required;</p> <p>7.1.1.3. Providing comprehensive financial analysis of all Exceptional Change activity in this Contract and making recommendations to the Authority on improvements in efficiency against Exceptional Change;</p> <p>7.1.2. How the Tenderer will develop accurate proposals for implementing the Exceptional Change by:</p> <p>7.1.2.1. Working collaboratively with the Authority to identify the causes of Exceptional Change in order to reduce the amount of change being delivered in this Contract;</p> <p>7.1.2.2. Working collaboratively with the Authority to fully understand the requirement and its implications on this Contract and the Training Services;</p> <p>7.1.2.3. Working collaboratively with the Authority to identify the information required to populate an Exceptional Change request;</p> <p>7.1.2.4. Checking that the requirement is appropriate to this Contract and that it does not conflict with any standards or obligations in this Contract;</p> <p>7.1.2.5. Ensuring that the all Exceptional Change proposals provide complete and transparent breakdown of costs associated with the change;</p> <p>7.1.2.6. Ensuring that any Exceptional Change request fully integrates and aligns with all aspects of Training Optimisation;</p> <p>7.1.3. How the Tenderer will manage the implementation of the Exceptional Change by:</p> <p>7.1.3.1. Working collaboratively with the Authority to agree the final proposal;</p> <p>7.1.3.2. Working collaboratively with the Authority to draft the Contract amendment in accordance with paragraph 12 of Schedule 4;</p> <p>7.1.3.3. Ensuring that the Contract amendment does not conflict with any existing obligations in this Contract;</p>	x				
	<p>7.2. The Tenderer's Training Services Management Plan details how the tenderer will manage Exceptional Change in accordance with part 8 of Schedule 4 including:</p> <p>7.2.1. How the Tenderer will manage and track Exceptional Change requests by:</p>		x			

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	<p>7.2.1.1. Providing an electronic method of viewing and tracking change activities; 7.2.1.2. Providing a holistic view of all Exceptional Change activity in this Contract and advising the Authority as required;</p> <p>7.2.2. How the Tenderer will develop accurate proposals for implementing the Exceptional Change by: 7.2.2.1. Working collaboratively with the Authority to fully understand the requirement; 7.2.2.2. Working collaboratively with the Authority to identify the information required to populate an Exceptional Change request; 7.2.2.3. Ensuring that the all Exceptional Change proposals provide complete and transparent breakdown of costs associated with the change; 7.2.2.4. Ensuring that any Exceptional Change request fully integrates and aligns with all aspects of Training Optimisation;</p> <p>7.2.3. How the Tenderer will manage the implementation of the Exceptional Change by: 7.2.3.1. Working collaboratively with the Authority to agree the final proposal; 7.2.3.2. Ensuring that the Contract amendment does not conflict with any existing obligations in this Contract;</p>					
	<p>7.3. The Tenderer's Training Services Management Plan details how the tenderer will manage Exceptional Change in accordance with part 8 of Schedule 4 including: 7.3.1. How the Tenderer will manage and track Exceptional Change requests by providing an electronic method of viewing and tracking change activities; 7.3.2. How the Tenderer will develop accurate proposals for implementing the Exceptional Change by: 7.3.2.1. Working collaboratively with the Authority to identify the information required to populate an Exceptional Change request; 7.3.2.2. Ensuring that the all Exceptional Change proposals provide complete and transparent breakdown of costs associated with the change; 7.3.3. How the Tenderer will manage the implementation of the Exceptional Change by: 7.3.3.1. Working collaboratively with the Authority to agree the final proposal; 7.3.3.2. Ensuring that the Contract amendment does not conflict with any existing obligations in this Contract;</p>			x		
	<p>7.4. The Tenderer's Training Services Management Plan details how the tenderer will manage Exceptional Change in accordance with part 8 of Schedule 4 including: 7.4.1. How the Tenderer will manage and track Exceptional Change requests; 7.4.2. How the Tenderer will develop accurate proposals for implementing the Exceptional Change; 7.4.3. How the Tenderer will manage the implementation of the Exceptional Change.</p>				x	
	<p>7.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.</p>					x

RoR: 7

Training Optimisation Service

Aim

1. To select a solution that will deliver a Training Optimisation Service.

Background

2. This RoR covers the requirement of the Tenderer to deliver the Training Optimisation Service. The Tenderer must ensure their Training Optimisation Service is fit for purpose, is professional and recognises the values and standards of the Authority.
3. The requirement for this area is defined in:
 - 3.1. Annex G to Schedule 2 (Statement of Requirements)
 - 3.2. Schedule 3 (Governance and Contract Management)
 - 3.3. Schedule 4 (Change and Change Management)
 - 3.4. Schedule 11 (Key Personnel)
 - 3.5. Schedule 12 (Performance Mechanism)
 - 3.6. Schedule 13 (Authority Audit)
 - 3.7. JSP 822 Governance and Management of Defence Individual Training and Education

Responses Required:

4. The Tenderer will provide details of its Key Personnel for Schedule 11 including:
 - 4.1.1. how the Key Personnel will be employed in delivering and managing the Training Delivery Service (Type C);
 - 4.1.2. the SQEP details of its Key Personnel; and
 - 4.1.3. a description of how the Key Personnel fit into the organogram provided in Schedule 11.
5. The Tenderer will provide a Training Optimisation Plan in accordance with Annex G to Schedule 2 and clause 34 including:
 - 5.1. The work the Tenderer will undertake against key milestones to achieve the outcomes of each stage of Training Optimisation in accordance with Annex G to Schedule 2;
6. The Tenderer will provide a Training Services Management Plan for part 10 of Schedule 14 detailing how the Tenderer will deliver a Training Optimisation Service that includes the following:
 - 6.1. How the Tenderer will gather and analyse data for Training Optimisation in accordance with Annex G to Schedule 2;
 - 6.2. How the Tenderer will identify potential Training Optimisation initiatives for Authority review in accordance with Schedule 3 and part 7 of Schedule 4;
 - 6.3. How the Tenderer will produce, manage and maintain the Training Optimisation Programme in accordance with clause 34.4;
 - 6.4. How the Tenderer will report Training Optimisation to the governance boards and meetings in accordance with Schedule 3 including:

- 6.4.1. Reporting and reviewing the Training Optimisation initiatives to the Level 3 Performance and Change Working Group in accordance with Schedule 3 and clause 34.5.1;
- 6.4.2. Reporting and reviewing the Training Optimisation Programme to the Level 2 Operating Board in accordance with Schedule 3 and clause 34.5.2;
- 6.4.3. Reporting and reviewing the Training Optimisation Benefits Statement in accordance with Schedule 3, clause 34.5.3 and clause 34.7.

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1.1. The Tenderer’s solution will deliver continued compliance with all standards and address all constraints.</p> <p>1.2. The Tenderer’s solution identifies Key Personnel to deliver the Training Optimisation Service requirement for Schedule 11 (Key Personnel).</p> <p>1.3. The Tenderer’s solution delivers Training Optimisation with no detrimental effect or risk to the delivery of the Training Services.</p> <p>1.4. The Tenderer’s solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism).</p>	In the Authority’s opinion all of the statements on the left are true				x
2.	<p>KEY STATEMENTS</p> <p>2.1. The Tenderer’s list of Key Personnel delivering Training Optimisation in Schedule 11 details how the Tenderer will:</p> <p>2.1.1. Provide substantial management oversight of the Training Optimisation Service to ensure that the strategic objectives of FOST and the Naval Service are supported by the Training Optimisation activities;</p> <p>2.1.2. Provide a collaborative working approach to Training Optimisation in this Contract and the wider Naval Service;</p> <p>2.1.3. Provide subject matter expertise advise to the Authority on the delivery of Training Optimisation in this Contract and the wider Naval Service by ensuring that personnel employed to manage the Training Optimisation Service:</p> <p>2.1.3.1. have a proven track record of substantial and current experience in delivering Training Optimisation initiatives in a variety of training delivery and education environments;</p> <p>2.1.3.2. have a proven track record of managing a team of high quality and dynamic personnel to deliver a continuously adapting requirement;</p> <p>2.1.3.3. have a proven track record of providing innovative solutions to problems;</p> <p>2.1.3.4. have proven excellence in forming and managing relationships in order to deliver an output;</p> <p>2.1.4. Provide subject matter expertise to the Authority for the delivery of Training Optimisation in this Contract and the wider Naval Service by ensuring that personnel delivering the service:</p> <p>2.1.4.1. have a proven track record of substantial and current experience in research and identifying qualitative and quantitative data sources and requirements;</p> <p>2.1.4.2. have a proven track record of substantial and current experience in complex analysis of data from</p>	x				

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	<p>a large variety of sources;</p> <p>2.1.4.3. have a proven track record of providing innovative solutions to problems;</p> <p>2.1.4.4. have proven current experience of working within the education sector;</p> <p>2.1.4.5. have a proven ability to build relationships and work collaboratively with a variety of personnel to deliver the output;</p> <p>2.1.4.6. have a proven track record of substantial and current experience in Training Optimisation or modernisation in a variety of training delivery an education environments;</p> <p>2.1.4.7. have a proven track record of identifying and understanding the management of systems in complex environments.</p>					
2.2.	<p>The Tenderer's list of Key Personnel delivering Training Optimisation in Schedule 11 details how the Tenderer will:</p> <p>2.2.1. Provide management oversight of the Training Optimisation Service to ensure that the strategic objectives of FOST are supported by the Training Optimisation activities;</p> <p>2.2.2. Provide a collaborative working approach to Training Optimisation in this Contract;</p> <p>2.2.3. Provide subject matter expertise advise to the Authority on the delivery of Training Optimisation in this Contract by ensuring that personnel employed to manage the Training Optimisation Service:</p> <p>2.2.3.1. have a proven track record of current experience in delivering Training Optimisation initiatives in training delivery and education environments;</p> <p>2.2.3.2. have a proven track record of managing a team of high quality personnel to deliver a continuously adapting requirement;</p> <p>2.2.3.3. have a proven track record of providing innovative solutions to problems;</p> <p>2.2.3.4. have proven excellence in managing relationships in order to deliver an output;</p> <p>2.2.4. Provide subject matter expertise to the Authority for the delivery of Training Optimisation in this Contract and the wider Naval Service by ensuring that personnel employed to deliver the Training Optimisation Service:</p> <p>2.2.4.1. have a proven track record of current experience in research and identifying qualitative and quantitative data sources and requirements;</p> <p>2.2.4.2. have a proven track record of current experience in analysis of data from a variety of sources;</p> <p>2.2.4.3. have a proven track record of providing innovative solutions to problems;</p> <p>2.2.4.4. have a proven ability to work collaboratively with a variety of personnel to deliver the output;</p> <p>2.2.4.5. have a proven track record of current experience in Training Optimisation or modernisation in training delivery and education environments.</p>		x			
2.3.	<p>The Tenderer's list of Key Personnel delivering Training Optimisation in Schedule 11 details how the Tenderer will:</p> <p>2.3.1. Provide management oversight of the Training Optimisation Service;</p> <p>2.3.2. Provide a collaborative working approach to Training Optimisation in this Contract;</p> <p>2.3.3. Provide subject matter expertise advise to the Authority on the delivery of Training Optimisation in this Contract by ensuring that personnel employed to manage the Training Optimisation Service:</p> <p>2.3.3.1. have current experience in delivering Training Optimisation initiatives education environments;</p> <p>2.3.3.2. have experience of managing a team of personnel to deliver a requirement;</p> <p>2.3.3.3. have experience in managing relationships in order to deliver an output;</p> <p>2.3.4. Provide subject matter expertise to the Authority for the delivery of Training Optimisation in this Contract and the wider Naval Service by ensuring that personnel employed to deliver the Training Optimisation Service:</p>			x		

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	<p>2.3.4.1. have current experience in research;</p> <p>2.3.4.2. have experience in analysis of data from a variety of sources;</p> <p>2.3.4.3. have the ability to work collaboratively with a variety of personnel to deliver the output.</p>					
	<p>2.4. The Tenderer's list of Key Personnel delivering Training Optimisation in Schedule 11 details how the Tenderer will:</p> <p>2.4.1. Provide management oversight of the Training Optimisation Service;</p> <p>2.4.2. Provide a collaborative working approach to Training Optimisation in this Contract;</p> <p>2.4.3. Provide subject matter expertise advise to the Authority on the delivery of Training Optimisation in this Contract by ensuring that personnel employed to manage the Training Optimisation Service;</p> <p>2.4.4. Provide subject matter expertise to the Authority for the delivery of Training Optimisation in this Contract and the wider Naval Service by ensuring that personnel employed to deliver the Training Optimisation Service.</p>				x	
	<p>2.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
3.	KEY STATEMENTS					
	<p>3.1. The Tenderer's Training Optimisation Plan identifies the work the Tenderer will undertake at each stage of the Training Optimisation Service in accordance with Annex G to Schedule 2 by:</p> <p>3.1.1. clearly identifying key milestones that map to the requirements of Schedule 2;</p> <p>3.1.2. identifying how the Tenderer will provide a comprehensive method of monitoring and updating key milestones in accordance with Schedule 3;</p> <p>3.1.3. clearly identifying the activities to be undertaken to achieve each key milestone;</p> <p>3.1.4. identifying how the Tenderer will continuously map the activities to the Training Services Management Plan in Schedule 14 provided in paragraph 6 of this RoR to ensure consistency;</p> <p>3.1.5. identifying the Key Personnel responsible for the activities against the list of Key Personnel in Schedule 11 provided in paragraph 4 of this RoR;</p> <p>3.1.6. identifying how the Tenderer will ensure that the Key Personnel have the appropriate SQEP to manage or deliver the requirements of each key milestone;</p> <p>3.1.7. identifying how the Tenderer will ensure that the Training Optimisation Plan will be continuously updated against Training Optimisation activities;</p> <p>3.1.8. identifying any risks to the delivery of the Training Optimisation Service and actions to mitigate the risks with personnel and activities allocated to each action in the Training Optimisation Plan;</p> <p>3.1.9. identifying how the Tenderer will provide a clear and easy to understand method of displaying the Training Optimisation Plan to the Authority for visibility from the Effective Date;</p> <p>3.1.10. identifying how the Tenderer will report the information in the Training Optimisation Plan to the Authority in accordance with Schedule 3.</p>	x				
	<p>3.2. The Tenderer's Training Optimisation Plan identifies the work the Tenderer will undertake at each stage of the Training Optimisation Service in accordance with Annex G to Schedule 2 by:</p> <p>3.3. identifying key milestones that map to the requirements of Schedule 2;</p> <p>3.3.1. identifying how the Tenderer will provide a method of monitoring and updating key milestones in accordance with Schedule 3;</p>		x			

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	<p>3.3.2. identifying the activities to be undertaken to achieve each key milestone;</p> <p>3.3.3. identifying how the Tenderer will map the activities to the Training Services Management Plan in Schedule 14 provided in paragraph 6 of this RoR to ensure consistency;</p> <p>3.3.4. identifying the Key Personnel responsible for the activities against the list of Key Personnel in Schedule 11 provided in paragraph 4 of this RoR;</p> <p>3.3.5. identifying how the Tenderer will ensure that the Training Optimisation Plan will be periodically updated against Training Optimisation activities;</p> <p>3.3.6. identifying how the Tenderer will provide a clear and easy to understand method of displaying the Training Optimisation Plan to the Authority for visibility from the Effective Date;</p> <p>3.3.7. identifying how the Tenderer will report the information in the Training Optimisation Plan to the Authority in accordance with Schedule 3.</p>					
	<p>3.4. The Tenderer's Training Optimisation Plan identifies the work the Tenderer will undertake at each stage of the Training Optimisation Service in accordance with Annex G to Schedule 2 by:</p> <p>3.4.1. identifying key milestones that map to the requirements of Schedule 2;</p> <p>3.4.2. identifying how the Tenderer will provide a method of monitoring and updating key milestones in accordance with Schedule 3;</p> <p>3.4.3. identifying the activities to be undertaken to achieve each key milestone;</p> <p>3.4.4. identifying how the Tenderer will report the information in the Training Optimisation Plan to the Authority in accordance with Schedule 3.</p>			x		
	<p>3.5. The Tenderer's Training Optimisation Plan identifies the work the Tenderer will undertake at each stage of the Training Optimisation Service in accordance with Annex G to Schedule 2 by:</p> <p>3.5.1. identifying key milestones that map to the requirements of Schedule 2;</p> <p>3.5.2. identifying the activities to be undertaken to achieve each key milestone;</p> <p>3.5.3. identifying how the Tenderer will report the information in the Training Optimisation Plan to the Authority in accordance with Schedule 3.</p>				x	
	<p>3.6. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
4.	<p>4.1. The Tenderer's Training Services Management Plan details how the Tenderer will gather and analyse necessary data to deliver the Training Optimisation Service by:</p> <p>4.1.1. identifying the data to be gathered in order for the Contractor to understand the training system in this Contract and the wider Naval Service;</p> <p>4.1.2. comprehensively and systematically analysing this data for the Contractor to understand the complexity and interdependencies associated with training in this Contract and the wider Naval Service;</p> <p>4.1.3. commencing data gathering and analysis at the Effective Date in order to provide an early understanding that will target subsequent data analysis and ensure Stage 1 is delivered against the requirements in Annex G to Schedule 2;</p> <p>4.1.4. conducting trend analysis of existing data from this Contract and wider Naval Service data sources to identify areas for further analysis and data gathering;</p> <p>4.1.5. presenting early analysis results at regular intervals to the Authority via the governance boards and</p>				x	

	<p>4.1.6. meetings in accordance with Schedule 3; collaboratively working with the Authority to understand and analyse all data gathering activities and results;</p> <p>4.1.7. conducting benchmarking activities to compare modern training delivery institutions with training delivery in this Contract and the wider Naval Service.</p>					
	<p>4.1. The Tenderer's Training Services Management Plan details how the Tenderer will gather and analyse necessary data to deliver the Training Optimisation Service by:</p> <p>4.1.1. identifying the data to be gathered in order for the Contractor to understand the training system in this Contract;</p> <p>4.1.2. conducting trend analysis of existing data in this Contract to identify areas for further analysis and data gathering;</p> <p>4.1.3. comprehensively analysing this data for the Contractor to understand the complexity and interdependencies associated with training in this Contract;</p> <p>4.1.4. presenting early analysis results at regular intervals to the Authority via the governance boards and meetings in accordance with Schedule 3;</p> <p>4.1.5. collaboratively working with the Authority to understand and analyse all data gathering activities and results.</p>		x			
	<p>4.2. The Tenderer's Training Services Management Plan details how the Tenderer will gather and analyse necessary data to deliver the Training Optimisation Service by:</p> <p>4.1.1. identifying the data to be gathered in order for the Contractor to understand the training in this Contract;</p> <p>4.1.2. analysing data for the Contractor to understand the complexity and interdependencies associated with training in this Contract;</p> <p>4.1.3. collaboratively working with the Authority to understand and analyse all data gathering activities and results.</p>			x		
	<p>4.3. The Tenderer's Training Services Management Plan details how the Tenderer will gather and analyse necessary data to deliver the Training Optimisation Service.</p>				x	
	<p>4.4. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
5.	<p>5.1. The Tenderer's Training Services Management Plan details how the Tenderer will identify Training Optimisation Initiatives by:</p> <p>5.1.1. collaboratively working with the Authority to identify potential Training Optimisation initiatives that will provide strategic benefit to FOST and could deliver benefit to the wider Naval Service;</p> <p>5.1.2. using the SQEP of Key Personnel in delivery of the Training Optimisation Service, identifying areas that have been successfully optimised in other projects or contracts and could be Optimised in this Contract;</p> <p>5.1.3. comparing the results of data analysis with the Training Optimisation outcomes in Annex G to Schedule 2 to identify areas in need of Training Optimisation;</p> <p>5.1.4. comparing the results of data analysis with the benchmarking activities to identify areas in need of Training Optimisation;</p> <p>5.1.5. producing comprehensive evidence to the Authority in the form of an outline business case detailing data analysis results, financial, performance and resource analysis for approval to proceed with a deep dive into areas for Training Optimisation;</p> <p>5.1.6. producing a full business case detailing Training Optimisation Initiatives and the expected outcomes and</p>		x			

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	5.1.7.	benefits to this Contract and the wider Naval Service and defence; identifying Training Optimisation initiatives that have not been approved by the Authority and conducting further analysis to either address rejection areas or provide additional evidence for approval.					
	5.2.	The Tenderer's Training Services Management Plan details how the Tenderer will identify Training Optimisation Initiatives by: 5.2.1. collaboratively working with the Authority to identify potential Training Optimisation initiatives that will provide strategic benefit to FOST; 5.2.2. comparing the results of data analysis with the Training Optimisation outcomes in Annex G to Schedule 2 to identify areas in need of Training Optimisation; 5.2.3. producing comprehensive evidence to the Authority in the form of an outline business case detailing data analysis results for approval to proceed with a deep dive into areas for Training Optimisation; 5.2.4. producing a full business case detailing Training Optimisation Initiatives and the expected outcomes and benefits to this Contract and the wider Naval Service and defence.		x			
	5.3.	The Tenderer's Training Services Management Plan details how the Tenderer will identify Training Optimisation Initiatives by: 5.3.1. collaboratively working with the Authority to identify potential Training Optimisation initiatives that will provide benefit to this Contract; 5.3.2. comparing the results of data analysis with the Training Optimisation outcomes in Annex G to Schedule 2 to identify areas in need of Training Optimisation; 5.3.3. producing evidence to the Authority detailing data analysis results for approval to proceed with a Training Optimisation initiative.			x		
	5.4.	The Tenderer's Training Services Management Plan details how the Tenderer will identify Training Optimisation Initiatives by: 5.4.1. comparing the results of data analysis with the Training Optimisation outcomes in Annex G to Schedule 2 to identify areas in need of Training Optimisation; and 5.4.2. producing evidence to the Authority for approval to proceed with a Training Optimisation initiative.				x	
	5.5.	In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
6.	6.1.	The Tenderer's Training Services Management Plan details how the Tenderer will produce, manage and maintain the Training Optimisation Programme in accordance with clause 34.4 by: 6.1.1. providing an electronic Training Optimisation Programme that can be accessed at all times by the Authority via the Business Information Service at Annex E to Schedule 2; 6.1.2. continuously updating the information so that the Training Optimisation Programme provides real time information whenever required; 6.1.3. providing comprehensive information in the Training Optimisation Programme to reflect proposals, decisions and actions taken against each initiative and the wider Training Optimisation Plan; 6.1.4. coherently managing all Training Optimisation initiatives in the Programme utilising project management techniques to ensure each initiative contributes to the Training Optimisation Plan and the expected outcomes in accordance with Annex G to Schedule 2;		x			

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	<p>6.1.5. tracking Training Optimisation initiatives against appropriate management information to ensure they deliver the expected outcomes and benefits;</p> <p>6.1.6. conducting holistic and systematic analysis of the Training Optimisation Programme to adjust the Training Optimisation Plan as initiatives positively affect the wider delivery of the Training Optimisation Service.</p>					
	<p>6.2. The Tenderer's Training Services Management Plan details how the Tenderer will produce, manage and maintain the Training Optimisation Programme in accordance with clause 34.4 by:</p> <p>6.2.1. providing an electronic Training Optimisation Programme that can be accessed at all times by the Authority via the Business Information Service at Annex E to Schedule 2;</p> <p>6.2.2. periodically updating the information so that the Training Optimisation Programme provides current information whenever required;</p> <p>6.2.3. providing information in the Training Optimisation Programme to reflect proposals, decisions and actions taken against each initiative;</p> <p>6.2.4. coherently managing all Training Optimisation initiatives in the Programme to ensure each initiative contributes to the Training Optimisation Plan and the expected outcomes in accordance with Annex G to Schedule 2;</p> <p>6.2.5. tracking Training Optimisation initiatives to ensure they deliver the expected outcomes and benefits.</p>		x			
	<p>6.3. The Tenderer's Training Services Management Plan details how the Tenderer will produce, manage and maintain the Training Optimisation Programme in accordance with clause 34.4 by:</p> <p>6.3.1. providing a Training Optimisation Programme via the Business Information Service at Annex E to Schedule 2;</p> <p>6.3.2. updating the information in the Training Optimisation Programme;</p> <p>6.3.3. providing information in the Training Optimisation Programme to reflect each initiative.</p>			x		
	<p>6.4. The Tenderer's Training Services Management Plan details how the Tenderer will produce the Training Optimisation Programme in accordance with clause 34.4.</p>				x	
	<p>6.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
7.	<p>7.1. The Tenderer's Training Services Management Plan details how the Tenderer will provide a sustainable Training Optimisation Service by:</p> <p>7.1.1. identifying a sustainable model for training in this Contract that may also benefit the wider Naval Service to ensure that training remains modern and fit for purpose;</p> <p>7.1.2. collaboratively working with the Authority to assist in the production of a comprehensive and dynamic Maritime Training Strategy for FOST that clearly reflects the Royal Navy as a leader in training delivery and education;</p> <p>7.1.3. identifying an embedded process to identify sources of data so that continuous Training Optimisation is conducted throughout the Contract Period and beyond;</p> <p>7.1.4. conducting comprehensive data analysis methods that are embedded into the Business Information requirements of Annex E to Schedule 2 in order to continuously assess results of and requirements for Training Optimisation;</p> <p>7.1.5. producing and gathering lessons learned from Training Optimisation both within this Contract, the wider</p>		x			

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	7.1.6.	Naval Service and other civilian training delivery institutions; producing an embedded method of updating management information and performance information in order to continuously monitor training delivery against future Training Optimisation.					
	7.2.	The Tenderer's Training Services Management Plan details how the Tenderer will provide a sustainable Training Optimisation Service by:					
	7.2.1.	identifying a sustainable model for training in this Contract to ensure that training remains modern and fit for purpose;					
	7.2.2.	collaboratively working with the Authority to assist in the production of a Maritime Training Strategy for FOST;					
	7.2.3.	identifying an embedded process to identify sources of data so that continuous Training Optimisation is conducted throughout the Contract Period;					
	7.2.4.	conducting data analysis methods that are embedded into the Business Information requirements of Annex E to Schedule 2 in order to assess results of and requirements for Training Optimisation;					
	7.2.5.	producing and gathering lessons learned from Training Optimisation within this Contract and the wider Naval Service.					
	7.3.	The Tenderer's Training Services Management Plan details how the Tenderer will provide a sustainable Training Optimisation Service by:					
	7.3.1.	identifying a sustainable model for training in this Contract to ensure that training remains fit for purpose;					
	7.3.2.	provide information for the Authority's production of a Maritime Training Strategy for FOST;					
	7.3.3.	conducting data analysis in order to assess results of and requirements for Training Optimisation;					
	7.3.4.	producing and gathering lessons learned from Training Optimisation within this Contract.					
	7.4.	The Tenderer's Training Services Management Plan details how the Tenderer will provide a sustainable Training Optimisation Service.					
	7.5.	In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					
8.	8.1.	The Tenderer's Training Services Management Plan details how the Tenderer will:					
	8.1.1.	Report and review the Training Optimisation initiatives to the Level 3 Performance and Change Working Group in accordance with Schedule 3 and clause 34.5.1 by:					
	8.1.1.1.	collaboratively working with the Level 3 Change Manager to report analysis of all results and discuss potential Training Optimisation initiatives for the PCWG;					
	8.1.1.2.	providing a comprehensive and informative method of reporting progress against each Training Optimisation initiative to the PCWG in accordance with Schedule 3;					
	8.1.1.3.	explaining to the PCWG the overall strategic effect of the Training Optimisation initiatives on the delivery of Training Services in this Contract and the wider Naval Service;					
	8.1.1.4.	collaboratively working with the PCWG to identify additional sources of data for analysis and potential areas for further analysis based on feedback from training quality assurance activities in accordance with Appendix 2 to Annex C of Schedule 2;					
	8.1.1.5.	working collaboratively with the PCWG to ensure that KPIs and PIs are continuously reviewed to monitor any changes in the delivery of Training Services due to Training Optimisation activities in					

	<p>accordance with Schedules 13 and 12;</p> <p>8.1.1.6. providing accurate and appropriate Training Optimisation data for the Monthly Report in accordance with Schedule 3;</p> <p>8.1.2. Report and review the Training Optimisation Programme to the Level 2 Operating Board in accordance with Schedule 3 and clause 34.5.2 by:</p> <p>8.1.2.1. working collaboratively with the Level 3 Change Manager to identify short, medium and long term benefits of individual Training Optimisation initiatives in the Training Optimisation Programme;</p> <p>8.1.2.2. working collaboratively with the Level 2 Chairman to monitor and manage growth in this Contract against the Training Optimisation Programme;</p> <p>8.1.2.3. providing accurate and appropriate Training Optimisation data for the Quarterly Report in accordance with Schedule 3;</p> <p>8.1.3. Report and review the Training Optimisation Benefits Statement in accordance with Schedule 3, clause 34.5.3 and clause 34.7. by:</p> <p>8.1.3.1. continuously updating the Training Optimisation Benefits Statement to the Level 1 Strategic Board to provide real time information as required by the Authority;</p> <p>8.1.3.2. presenting a balance of benefits to the Authority and the Contractor to indicate the overall strategic benefit of the Training Optimisation Services;</p> <p>8.1.3.3. providing transparency on Contractor investment in Training Optimisation;</p> <p>8.1.3.4. providing comprehensive and holistic management information to the Strategic Board showing how Training Optimisation benefits integrate with the Training Optimisation Plan to provide a through life Training Optimisation Service.</p>					
	<p>8.2. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <p>8.2.1. Report and review the Training Optimisation initiatives to the Level 3 Performance and Change Working Group in accordance with Schedule 3 and clause 34.5.1 by:</p> <p>8.2.1.1. collaboratively working with the Level 3 Change Manager to report analysis of all results and discuss potential Training Optimisation initiatives for the PCWG;</p> <p>8.2.1.2. providing a comprehensive method of reporting progress against each Training Optimisation initiative to the PCWG in accordance with Schedule 3;</p> <p>8.2.1.3. collaboratively working with the PCWG to identify areas for further analysis based on feedback from training quality assurance activities in accordance with Appendix 2 to Annex C of Schedule 2;</p> <p>8.2.1.4. working collaboratively with the PCWG to ensure that KPIs and PIs are reviewed periodically to monitor any changes in the delivery of Training Services due to Training Optimisation activities in accordance with Schedules 13 and 12;</p> <p>8.2.1.5. providing accurate and appropriate Training Optimisation data for the Monthly Report in accordance with Schedule 3;</p> <p>8.2.2. Report and review the Training Optimisation Programme to the Level 2 Operating Board in accordance with Schedule 3 and clause 34.5.2 by:</p> <p>8.2.2.1. working collaboratively with the Level 3 Change Manager to identify benefits of individual Training Optimisation initiatives in the Training Optimisation Programme;</p> <p>8.2.2.2. providing accurate and appropriate Training Optimisation data for the Quarterly Report in</p>		x			

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	<p>accordance with Schedule 3;</p> <p>8.2.3. Report and review the Training Optimisation Benefits Statement to the Level 1 Strategic Board in accordance with Schedule 3, clause 34.5.3 and clause 34.7 by:</p> <p>8.2.3.1. periodically updating the Training Optimisation Benefits Statement to provide information as required by the Authority;</p> <p>8.2.3.2. providing comprehensive management information to the Strategic Board showing how Training Optimisation benefits integrate with the Training Optimisation Plan to provide a Training Optimisation Service.</p>					
8.3.	<p>The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <p>8.3.1. Report and review the Training Optimisation initiatives to the Level 3 Performance and Change Working Group in accordance with Schedule 3 and clause 34.5.1 report by:</p> <p>8.3.1.1. reporting analysis of all results potential Training Optimisation initiatives for the PCWG;</p> <p>8.3.1.2. providing a method of reporting progress against each Training Optimisation initiative to the PCWG in accordance with Schedule 3;</p> <p>8.3.1.3. identifying areas for further analysis based on feedback from training quality assurance activities in accordance with Appendix 2 to Annex C of Schedule 2;</p> <p>8.3.1.4. ensuring that KPIs and PIs are reviewed to monitor any changes in the delivery of Training Services due to Training Optimisation activities in accordance with Schedules 13 and 12;</p> <p>8.3.1.5. providing accurate and appropriate Training Optimisation data for the Monthly Report in accordance with Schedule 3;</p> <p>8.3.2. Report and review the Training Optimisation Programme to the Level 2 Operating Board in accordance with Schedule 3 and clause 34.5.2 by:</p> <p>8.3.2.1. identifying benefits of individual Training Optimisation initiatives in the Training Optimisation Programme;</p> <p>8.3.2.2. providing accurate and appropriate Training Optimisation data for the Quarterly Report in accordance with Schedule 3;</p> <p>8.3.3. Report and review the Training Optimisation Benefits Statement to the Level 1 Strategic Board in accordance with Schedule 3, clause 34.5.3 and clause 34.7 by:</p> <p>8.3.3.1. periodically updating the Training Optimisation Benefits Statement to provide information as required by the Authority;</p> <p>8.3.3.2. providing management information for the Annual Report in accordance with Schedule 3.</p>			x		
8.4.	<p>The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <p>8.4.1.1. Report and review the Training Optimisation initiatives to the Level 3 Performance and Change Working Group in accordance with Schedule 3 and clause 34.5.1;</p> <p>8.4.1.2. Report and review the Training Optimisation Programme to the Level 2 Operating Board in accordance with Schedule 3 and clause 34.5.2;</p> <p>8.4.1.3. Report and review the Training Optimisation Benefits Statement to the Level 1 Strategic Board in accordance with Schedule 3, clause 34.5.3 and clause 34.7.</p>				x	
8.5.	<p>In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x

RoR: 08

Training Delivery Service (Type C)

Aim

1. To select a solution that will deliver a Training Delivery Service.

Background

2. This RoR covers the requirement of the Tenderer to deliver the Training Delivery Service (Type C). The Tenderer must ensure their Training Delivery Service is fit for purpose, is professional and recognises the values and standards of the Authority.
3. The requirement for this area is defined in:
 - 3.1. Annex A to Schedule 2 (Statement of Requirements)
 - 3.2. Annex C to Schedule 2 (Statement of Requirements)
 - 3.3. Schedule 11 (Key Personnel)
 - 3.4. JSP 822 Governance and Management of Defence Individual Training and Education

Responses Required:

4. The Tenderer will provide details of its Key Personnel for Schedule 11 including:
 - 4.1. how the Key Personnel will be employed in delivering and managing the Training Delivery Service (Type C);
 - 4.2. the SQEP details of its Key Personnel; and
 - 4.3. a description of how the Key Personnel fit into the organogram provided in Schedule 11.
5. The Tenderer will provide a Training Services Management Plan for part 4 of Schedule 14 detailing how the Tenderer will deliver a Training Delivery Service (Type C) that includes the following:
 - 5.1. Training Delivery
 - 5.1.1. How the Tenderer will provide full management oversight of the course;
 - 5.1.2. How the Tenderer will identify and deliver the competence requirements of the Contractor Instructors in delivering the Type C courses;
 - 5.1.3. How the Tenderer will deliver course management for all Type C courses;
 - 5.2. Training Support
 - 5.2.1. How the Tenderer will evaluate and validate the training delivery to ensure that it meets the requirement.
 - 5.2.2. How the Tenderer will assure the SQEP of the Contractor Instructors required to deliver the courses;

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5.2.3. How the Tenderer will ensure the course design continually meets the requirements of the Authority and achieves the competence levels in Appendix 1 to Annex A of Schedule 2;

5.2.4. How the Tenderer will provide course programming and resource allocation to the Type C courses;

5.2.5. How the Tenderer will provide administration support to the Type C courses;

6. The Tenderer will explain how the GFR positions will be used to deliver the Training Delivery Service (Type C) including:

6.1. How the Tenderer will identify the requirements for the Terms of Reference for Authority approval in accordance with Schedule 2;

6.2. How the tenderer will manage the percentage provision in accordance with Appendix 1 to Annex A of Schedule 2;

6.3. How the Tenderer will provide the GFR post with appropriate management responsibilities applicable to the rank and grade in the Royal Navy.

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable	
1.	<p>MANDATORY STATEMENTS</p> <ol style="list-style-type: none"> 1. The Tenderer’s solution will deliver continued compliance with all standards and address all constraints. 2. The Tenderer’s solution identifies Key Personnel to deliver the Training Delivery Service (Type C) requirement for Schedule 11 (Key Personnel). 3. The Tenderer’s solution delivers Type C training with no detrimental effect or risk to the delivery of the other Training Services. 4. The Tenderer’s solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism). 	In the Authority’s opinion all of the statements on the left are true					x
2.	<p>KEY STATEMENTS</p> <p>2.1. The Tenderer’s list of Key Personnel in Schedule 11 delivering Type C Training details how the Tenderer will:</p> <ol style="list-style-type: none"> a. provide substantial management oversight of the Training Delivery Service (Type C) to ensure that the output standards are achieved; b. provide a collaborative working approach to the Training Delivery Service (Type C); c. provide subject matter expertise advice to the Authority on the delivery of Type C training in this Contract by ensuring that personnel employed to manage the Training Delivery Service (Type C): <ol style="list-style-type: none"> i. have a proven track record of substantial and current experience in managing training and education in a variety of training and education environments; ii. have a proven track record of managing a team of high quality and dynamic personnel to deliver a training requirement; iii. have a proven track record of providing innovative solutions to problems; iv. have proven excellence in forming and managing relationships in order to deliver an output; d. provide subject matter expertise to the Authority for the delivery of Type C training in this Contract by ensuring that personnel delivering the service: <ol style="list-style-type: none"> i. have a proven track record of substantial and current experience in delivering training and education in a variety of complex training and education environments; ii. have the required competence to deliver the training; and iii. have a proven track record of actively conducting CPD to improve their training delivery skills, knowledge and techniques; 	x					

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	<p>2.2. The Tenderer's list of Key Personnel in Schedule 11 delivering Type C Training details how the Tenderer will:</p> <ul style="list-style-type: none"> a. provide management oversight of the Training Delivery Service (Type C) to ensure that the output standards are achieved; b. provide a collaborative working approach to the Training Delivery Service (Type C); c. provide subject matter expertise advice to the Authority on the delivery of Type C training in this Contract by ensuring that personnel employed to manage the Training Delivery Service (Type C): <ul style="list-style-type: none"> i. have a proven track record of experience in managing training and education in a variety of training and education environments; ii. have experience of managing a team of personnel to deliver a training requirement; iii. have experience in managing relationships in order to deliver an output; d. provide subject matter expertise to the Authority for the delivery of Type C training in this Contract by ensuring that personnel delivering the service: <ul style="list-style-type: none"> i. have experience in delivering training and education in a variety of training environments; ii. have the required competence to deliver the training; and iii. have experience of conducting CPD to improve their training delivery skills, knowledge and techniques; 		x			
	<p>2.3. The Tenderer's list of Key Personnel in Schedule 11 delivering Type C Training details how the Tenderer will:</p> <ul style="list-style-type: none"> a. provide management oversight of the Training Delivery Service (Type C) to ensure that the output standards are achieved; b. provide a collaborative working approach to the Training Delivery Service (Type C); c. provide subject matter expertise advice to the Authority on the delivery of Type C training in this Contract by ensuring that personnel employed to manage the Training Delivery Service (Type C): <ul style="list-style-type: none"> i. have experience in managing training in training environments; ii. have experience in managing relationships in order to deliver an output; d. provide subject matter expertise to the Authority for the delivery of Type C training in this Contract by ensuring that personnel delivering the service: <ul style="list-style-type: none"> i. have experience in delivering training in a training environment; and ii. have the required competence to deliver the training; 			x		
	<p>2.4. The Tenderer's list of Key Personnel in Schedule 11 delivering Type C Training details how the Tenderer will:</p> <ul style="list-style-type: none"> a. provide management oversight of the Training Delivery Service (Type C) to ensure that the output standards are achieved; b. provide a collaborative working approach to the Training Delivery Service (Type C); c. provide subject matter expertise advice to the Authority on the delivery of Type C training in this Contract; and d. provide subject matter expertise to the Authority for the delivery of Type C training in this Contract; 				x	
	<p>2.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.</p>					x

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3.	<p>3.1. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will identify and deliver the competence requirements of the Contractor Instructors in delivering the Type C courses by:</p> <ul style="list-style-type: none"> a. conducting a skills audit to identify new employees that will be employed to deliver Type C training in this Contract; b. identifying gaps in personnel required to deliver the Type C training requirement; c. identifying gaps in skills of personnel required to deliver the Type C training requirement; d. taking action to close the gaps; e. identifying dates that ensure the actions will be completed in time to deliver the Type C training requirement; f. identifying mitigation actions to be taken in case of deliver dates not being achieved; g. ensuring that personnel delivering Type C training are SQEP prior to and in time for delivering instruction; h. ensuring that personnel have appropriate security clearances to work on the security classification of training required by the Authority; i. ensuring that personnel conduct CPD to ensure currency in the subject matter is maintained; and j. ensuring that personnel conduct CPD to ensure training delivery skills are current. 	x				
	<p>3.2. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will identify and deliver the competence requirements of the Contractor Instructors in delivering the Type C courses by:</p> <ul style="list-style-type: none"> a. conducting a skills audit to identify new employees that will be employed to deliver Type C training in this Contract; b. identifying gaps in personnel required to deliver the Type C training requirement; c. identifying gaps in skills of personnel required to deliver the Type C training requirement; d. taking action to close the gaps; e. ensuring that personnel delivering Type C training are SQEP prior to and in time for delivering instruction; f. ensuring that personnel have appropriate security clearances to work on the security classification of training required by the Authority; and g. ensuring that personnel conduct CPD to ensure training delivery skills are current. 		x			
	<p>3.3. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will identify and deliver the competence requirements of the Contractor Instructors in delivering the Type C courses by:</p> <ul style="list-style-type: none"> a. conducting a skills audit to identify new employees that will be employed to deliver Type C training in this Contract; b. identifying gaps in personnel required to deliver the Type C training requirement; c. identifying gaps in skills of personnel required to deliver the Type C training requirement; d. taking action to close the gaps; e. ensuring that personnel delivering Type C training are SQEP in time for delivering instruction; f. ensuring that personnel have appropriate security clearances to work on the security classification of training required by the Authority. 			x		
	<p>3.4. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will identify and deliver the competence requirements of the Contractor Instructors in delivering the Type C courses by:</p> <ul style="list-style-type: none"> a. ensuring that personnel delivering Type C training are SQEP; b. ensuring that personnel have appropriate security clearances to work on the security classification of training 				x	

	required by the Authority.				
	3.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.				x
4.	<p>4.1. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will:</p> <p>a. evaluate and validate the training delivery to ensure that it meets the requirement by:</p> <ul style="list-style-type: none"> i. targeting assurance activities against external evaluation and audit results; ii. monitoring examination results to identify any problematic areas for further investigation; iii. working collaboratively with the Authority to identify any areas of concern in the delivery of the training; iv. working collaboratively with the Authority to ensure the training delivery solution for Type C courses is adequate and appropriate to deliver operational capability; <p>b. assure the SQEP of the Contractor Instructors required to deliver the courses by:</p> <ul style="list-style-type: none"> i. comprehensively tracking all Contractor Instructors; ii. making SQEP information available in the Competency Management System on the BIS (Annex E to Schedule 2) for governance and contract management purposes; iii. clearly linking the maintenance of SQEP to PIs and KPIs to inform performance management (Schedule 12, Performance Mechanism); iv. conducting horizon scanning for new training to identify surges in instructor requirements; v. ensuring sufficient instructor resource to allow for short notice unavailability of instructors; <p>c. ensure the course design continually meets the requirements of the Authority and achieves the competence levels in Appendix 1 to Annex A of Schedule 2 by:</p> <ul style="list-style-type: none"> i. acting immediately against any actions or observations from the evaluation and validation of training; ii. conducting horizon scanning to ensure training remains current; iii. fully integrating with the Training Optimisation (Annex G to Schedule 2) to ensure continuous improvement of training; iv. fully integrating with all other training design activities; v. working collaboratively with the Authority to ensure that the requirement remains appropriate and that the training design fully meets the requirement; <p>d. provide course programming and resource allocation to the Type C courses by:</p> <ul style="list-style-type: none"> i. fully integrating with the training planning function in Annex C to Schedule 2 and the response in RoR 13; ii. ensuring that all of the training requirements throughout the duration of the Type C course are identified and appropriately planned; iii. allowing redundancy in the programme for remedial training and re-take of examinations; <p>e. provide administration support to the Type C courses by:</p> <ul style="list-style-type: none"> i. ensuring trainees are of the correct input standards; ii. preparing the classrooms / training equipment for instruction prior to delivery; iii. ensuring outside lecturers including escort requirements have been arranged; iv. preparing for post course testing; v. providing management information to inform Training Optimisation (Annex G to Schedule 2); vi. producing formal feedback to divisional officers on trainee performance; and vii. integrating with the CfTN coaching provision in Annex C to Schedule 2. 	x			

	<p>4.2. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will:</p> <ul style="list-style-type: none"> a. evaluate and validate the training delivery to ensure that it meets the requirement by: <ul style="list-style-type: none"> i. monitoring examination results to identify any problematic areas for further investigation; ii. working collaboratively with the Authority to ensure the training delivery solution for Type C courses is adequate and appropriate to deliver operational capability; b. assure the SQEP of the Contractor Instructors required to deliver the courses by: <ul style="list-style-type: none"> i. comprehensively tracking all Contractor Instructors; ii. making SQEP information available in the Competency Management System on the BIS (Annex E to Schedule 2) for governance and contract management purposes; iii. clearly linking the maintenance of SQEP to PIs and KPIs to inform performance management (Schedule 12, Performance Mechanism); c. ensure the course design continually meets the requirements of the Authority and achieves the competence levels in Appendix 1 to Annex A of Schedule 2 by: <ul style="list-style-type: none"> i. acting against any actions or observations from the evaluation and validation of training; ii. fully integrating with the Training Optimisation (Annex G to Schedule 2) to ensure continuous improvement of training; iii. fully integrating with all other training design activities; d. provide course programming and resource allocation to the Type C courses by: <ul style="list-style-type: none"> i. fully integrating with the training planning function in Annex C to Schedule 2 and the response in RoR 13; ii. ensuring that all of the training requirements throughout the duration of the Type C course are identified and appropriately planned; e. provide administration support to the Type C courses by: <ul style="list-style-type: none"> i. preparing the classrooms / training equipment for instruction prior to delivery; ii. ensuring outside lecturers including escort requirements have been arranged; iii. providing management information to inform Training Optimisation (Annex G to Schedule 2); and iv. integrating with the CfTN coaching provision in Annex C to Schedule 2. 		x			
	<p>4.3. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will:</p> <ul style="list-style-type: none"> a. evaluate and validate the training delivery to ensure that it meets the requirement by working collaboratively with the Authority to ensure the training delivery solution for Type C courses is adequate and appropriate to deliver operational capability; b. assure the SQEP of the Contractor Instructors required to deliver the courses by: <ul style="list-style-type: none"> i. comprehensively tracking all Contractor Instructors; ii. making SQEP information available in the Competency Management System on the BIS (Annex E to Schedule 2) for governance and contract management purposes; c. ensure the course design continually meets the requirements of the Authority and achieves the competence levels in Appendix 1 to Annex A of Schedule 2 by: <ul style="list-style-type: none"> i. fully integrating with the Training Optimisation (Annex G to Schedule 2) to ensure continuous improvement of training; ii. fully integrating with all other training design activities; iii. provide course programming and resource allocation to the Type C courses by fully integrating with the 		x			

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	<p>training planning function in Annex C to Schedule 2 and the response in RoR 13; and</p> <p>d. provide administration support to the Type C courses by preparing the classrooms / training equipment for instruction prior to delivery.</p>					
	<p>4.4. The Tenderer's Training Services Management Plan for part 4 of Schedule 14 details how the Tenderer will:</p> <p>a. evaluate and validate the training delivery to ensure that it meets the requirement;</p> <p>b. assure the SQEP of the Contractor Instructors required to deliver the courses;</p> <p>c. ensure the course design continually meets the requirements of the Authority and achieves the competence levels in Appendix 1 to Annex A of Schedule 2;</p> <p>d. provide course programming and resource allocation to the Type C courses; and</p> <p>e. provide administration support to the Type C courses.</p>				x	
	<p>4.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.</p>					x
5.	<p>5.1. The Tenderer's solution explains how the GFR positions will be used to deliver the Training Delivery Service (Type C) including:</p> <p>a. how the Tenderer will identify the requirements for the Terms of Reference for Authority approval in accordance with Schedule 2 by:</p> <p>i. working collaboratively with the Authority to approve the TORs in accordance with paragraph 26 of Schedule 2;</p> <p>ii. ensuring that the TORs clearly reflect the requirements of Appraisal Reporting competences;</p> <p>iii. monitoring the contribution of GFR and providing this data to Training Optimisation in accordance with Annex G to Schedule 2;</p> <p>iv. constantly engaging with the Divisional Officer of the GFR in order to ensure the care and welfare of the GFR is maintained at all times;</p> <p>v. providing the Divisional Officer of the GFR regular updates on performance;</p> <p>b. how the tenderer will manage the percentage provision in accordance with Appendix 1 to Annex A of Schedule 2;</p> <p>i. producing and managing a procedure to facilitate working arrangements that do not exceed the percentage of use in accordance with Appendix 1 to Annex A of Schedule 2;</p> <p>ii. working collaboratively with the Authority to ensure the percentage is adequate and appropriate to deliver the service and allow the GFR to progress in the RN;</p> <p>iii. providing the GFR with opportunities to demonstrate competence against the appraisal reports for that reporting period;</p> <p>iv. manage the GFR such that short notice RN requirements can be met with ease and no detriment to the GFR either in delivering the Training Delivery Service (Type C) or progression in the RN;</p> <p>v. supporting the GFR in continued professional and personal development to deliver the training services and progress in the RN;</p> <p>c. how the Tenderer will provide the GFR post with appropriate management responsibilities applicable to the rank and grade in the Royal Navy by:</p> <p>i. ensuring that the line management chain is appropriate to the GFR rank;</p> <p>ii. ensuring that every opportunity is provided to avoid disadvantage to the progression in the RN of the GFR on a high percentage use to the Contractor; and</p>	x				

	<p>iii. working collaboratively with the Authority to identify GFR with promotion potential in order to provide these GFR with challenges appropriate to their rank and promotion opportunities;</p>					
	<p>5.2. The Tenderer's solution explains how the GFR positions will be used to deliver the Training Delivery Service (Type C) including:</p> <ul style="list-style-type: none"> a. how the Tenderer will identify the requirements for the Terms of Reference for Authority approval in accordance with Schedule 2 by: <ul style="list-style-type: none"> i. drafting the TORs for Authority approval in accordance with paragraph 26 of Schedule 2; ii. monitoring the contribution of GFR and providing this data to Training Optimisation in accordance with Annex G to Schedule 2; iii. engaging with the Divisional Officer of the GFR in order to ensure the care and welfare of the GFR is maintained at all times; iv. providing the Divisional Officer of the GFR regular updates on performance; b. how the tenderer will manage the percentage provision in accordance with Appendix 1 to Annex A of Schedule 2; <ul style="list-style-type: none"> i. producing and managing a procedure to facilitate working arrangements that do not exceed the percentage of use in accordance with Appendix 1 to Annex A of Schedule 2; ii. working collaboratively with the Authority to ensure the percentage is adequate and appropriate to deliver the service and allow the GFR to progress in the RN; iii. manage the GFR such that short notice RN requirements can be met with ease and no detriment to the GFR either in delivering the Training Delivery Service (Type C) or progression in the RN; iv. supporting the GFR in continued professional and personal development to deliver the training services and progress in the RN; c. how the Tenderer will provide the GFR post with appropriate management responsibilities applicable to the rank and grade in the Royal Navy by: <ul style="list-style-type: none"> i. ensuring that the line management chain is appropriate to the GFR rank; and ii. ensuring that every opportunity is provided to avoid disadvantage to the progression in the RN of the GFR on a high percentage use to the Contractor; 		x			
	<p>5.3. The Tenderer's solution explains how the GFR positions will be used to deliver the Training Delivery Service (Type C) including:</p> <ul style="list-style-type: none"> a. how the Tenderer will identify the requirements for the Terms of Reference for Authority approval in accordance with Schedule 2 by: <ul style="list-style-type: none"> i. drafting the TORs for Authority approval in accordance with paragraph 26 of Schedule 2; ii. engaging with the Divisional Officer of the GFR in order to ensure the care and welfare of the GFR is maintained at all times; b. how the tenderer will manage the percentage provision in accordance with Appendix 1 to Annex A of Schedule 2; <ul style="list-style-type: none"> i. producing and managing a procedure to facilitate working arrangements that do not exceed the percentage of use in accordance with Appendix 1 to Annex A of Schedule 2; ii. working collaboratively with the Authority to ensure the percentage is adequate and appropriate to deliver the service and allow the GFR to progress in the RN; and c. how the Tenderer will provide the GFR post with appropriate management responsibilities applicable to the rank and grade in the Royal Navy by ensuring that the line management chain is appropriate to the GFR rank; 		x			

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	<p>5.4. The Tenderer's solution explains how the GFR positions will be used to deliver the Training Delivery Service (Type C) including:</p> <ul style="list-style-type: none"> a. how the Tenderer will identify the requirements for the Terms of Reference for Authority approval in accordance with Schedule 2 by drafting the TORs for Authority approval in accordance with paragraph 26 of Schedule 2; b. how the tenderer will manage the percentage provision in accordance with Appendix 1 to Annex A of Schedule 2; and c. how the Tenderer will provide the GFR post with appropriate management responsibilities applicable to the rank and grade in the Royal Navy. 				x	
	<p>5.5. In the Authority's opinion, the conditions under which the scores above will be awarded have not been met.</p>					x

RoR: 09

Training Delivery Support Service (Type B)

Aim

1. To select a solution that will deliver a Training Delivery Support Service.

Background

2. This RoR covers the requirement of the Tenderer to deliver the Training Delivery Support Service (Type B). The Tenderer must ensure their Training Delivery Service is fit for purpose, is professional and recognises the values and standards of the Authority.
3. This question refers to the competence of Training Delivery staff only; staff competence in other areas is addressed in other questions.
4. The requirement for this area is defined in:
 - 4.1. Annex B to Schedule 2 (Statement of Requirements)
 - 4.2. Schedule 4 (Change and Change Management)
 - 4.3. Schedule 5 (Transition)
 - 4.4. JSP 822 Governance and Management of Defence Individual Training and Education

Responses Required:

5. The Tenderer will explain how the Skills audit will be conducted in accordance with Schedule 5 including:
 - 5.1.1. how the Tenderer will provide and manage the Competency Management System in accordance with clause 15.2; and
 - 5.1.2. how the Tenderer will implement the personnel change programme to cover training and competency gaps in accordance with clause 15.3.
6. The Tenderer will provide a Training Services Management Plan for Part 5 of Schedule 14 detailing how the Tenderer will deliver a Training Delivery Support Service (Type B) that includes the following:
 - 6.1. Instructor Qualifications:
 - 6.1.1. how the Tenderer will ensure that the Contractor Instructors will continue to be suitably qualified and experienced to deliver training against the requirements of Annex B to Schedule 2;
 - 6.1.2. how the Tenderer will monitor and report the SQEP of the Military Instructors against the DTC requirement in JSP 822, interfacing with the requirements of Appendix 2 to Annex C of Schedule 2;
 - 6.1.3. how the Tenderer will manage Contractor Instructors and Military Instructors' CPD in accordance with Annex B to Schedule 2;
 - 6.1.4. how the Tenderer will apply for permission to employ an instructor with equivalent SQEP in accordance with paragraph 4.3 of Annex B to Schedule 2; and

6.1.5. how the Tenderer will use the Competency Management System to manage paragraphs 6.1.1 to 6.1.4 above.

6.2. Instructor Allocation:

6.2.1. How the Tenderer will interface with the Training Planning Services function in Annex C to Schedule 2 to:

6.2.1.1. ensure that sufficient Contractor Instructors and Military Instructors are provided to deliver the Training Services;

6.2.1.2. manage short and long term unavailability of Contractor Instructors and Military Instructors; and

6.2.1.3. manage the overall termly loading of the instructors;

6.3. Direct Support Tasks to Training:

6.3.1. How the Tenderer will interface with other functions to deliver the Direct Support Tasks to Training in accordance with paragraph 8 to Annex B to Schedule 2;

6.4. Statement of Training Task Plus (SOTT+)

6.4.1. How the Tenderer will interface with the production of the SOTT+ in Appendix 3 to Annex C of Schedule 2;

7. The Tenderer will provide details of its Key Personnel for Schedule 11 including:

7.1.1. how the Key Personnel will be employed in delivering and managing the Training Delivery Service (Type C);

7.1.2. the SQEP details of its Key Personnel; and

7.1.3. a description of how the Key Personnel fit into the organogram provided in Schedule 11.

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1. The Tenderer’s solution will deliver continued compliance with all standards and address all constraints.</p> <p>2. The Tenderer’s solution identifies Key Personnel to deliver the Training Delivery Service (Type B) requirement for Schedule 11 (Key Personnel).</p> <p>3. The Tenderer’s solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism).</p>	In the Authority’s opinion all of the statements on the left are true, or				x
2.	<p>KEY STATEMENTS</p> <p>2.1. The Tenderer’s solution will produce a skills audit that identifies all personnel employed to deliver training in the previous Contract and those employees who shall transfer to the Contract pursuant to TUPE.</p> <p>2.2. The skills audit shall include identification of:</p> <p>a. new employees that will be employed to deliver training in the Contract;</p> <p>b. gaps in personnel required to deliver the Training Delivery Service (Type B) requirement; and</p> <p>c. gaps in skills of personnel required to deliver the Training Delivery Service (Type B) requirement;</p> <p>2.3. The skills audit shall result in a Competency Management System that:</p> <p>a. Is available on the BIS (Annex E to Schedule 2) for governance and contract management purposes;</p> <p>b. Clearly links to PIs and KPIs to inform performance management (Schedule 12, Performance Mechanism);</p> <p>c. Is able to comprehensively track all Contractor Instructors and Military Instructors;</p> <p>d. Is fully integrated with the Trainer Capability Assurance requirements in Annex C of Schedule 2; and</p> <p>e. is able to provide management information to inform Training Optimisation (Annex G to Schedule 2);</p> <p>2.4. The skills audit will result in a personnel change programme to cover training and competency gaps including:</p> <p>a. Actions to be taken to close the gaps;</p> <p>b. Dates that ensure the actions will be completed in time to deliver the Training Delivery Service (Type B) requirement; and</p> <p>c. Mitigation actions to be taken in case of delivery dates not being achieved;</p>	x				

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	<p>2.5. The Tenderer's solution will produce a skills audit that identifies all personnel employed to deliver training in the previous Contract and those employees who shall transfer to the Contract pursuant to TUPE.</p> <p>2.6. The skills audit shall include identification of:</p> <ul style="list-style-type: none"> a. new employees that will be employed to deliver training in the Contract; and b. gaps in personnel required to deliver the Training Delivery Service (Type B) requirement; <p>2.7. The skills audit shall result in a Competency Management System that:</p> <ul style="list-style-type: none"> a. Is available on the BIS (Annex E to Schedule 2) for governance and contract management purposes; b. Clearly links to PIs and KPIs to inform performance management (Schedule 12); and c. Is able to comprehensively track all Contractor Instructors and Military Instructors; <p>2.8. The skills audit will result in a personnel change programme to cover training and competency gaps including:</p> <ul style="list-style-type: none"> a. Actions to be taken to close the gaps; and b. Dates that ensure the actions will be completed in time to deliver the Training Delivery Service (Type B) requirement. 		x			
	<p>2.9. The Tenderer's solution will produce a skills audit that identifies all personnel employed to deliver training in the previous Contract and those employees who shall transfer to the Contract pursuant to TUPE.</p> <p>2.10. The skills audit shall include identification of new employees that will be employed to deliver training in the Contract.</p> <p>2.11. The skills audit shall result in a Competency Management System that is available on the BIS (Annex E to Schedule 2) for governance and contract management purposes.</p> <p>2.12. The skills audit will result in a personnel change programme to cover training and competency gaps including actions to be taken to close the gaps.</p>			x		
	<p>2.13. The Tenderer's solution will produce a skills audit that identifies all personnel employed to deliver training in the previous Contract and those employees who shall transfer to the Contract pursuant to TUPE.</p> <p>2.14. The skills audit shall result in a Competency Management System.</p> <p>2.15. The skills audit will result in a personnel change programme to cover training and competency gaps.</p>				x	
	<p>2.16. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
3.	<p>3.1 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. Ensure that the Contractor Instructors will continue to be SQEP against the requirements of Annex B to Schedule 2 by: <ul style="list-style-type: none"> i. Ensuring new personnel are SQEP prior to and in time for delivering instruction; ii. ensuring that personnel have appropriate security clearances to work on the security classification of training required by the Authority; i. Conducting CPD to ensure currency in the subject matter is maintained; and ii. Conducting CPD to ensure training delivery skills are current; b. Monitor and manage the SQEP of Military Instructors by: <ul style="list-style-type: none"> i. Engaging with Establishment COs to release Military Instructors for DTC requirements; ii. Reporting to the Authority any shortfalls in Military Instructor SQEP; and iii. Integrating with and supporting the DTC requirements in Annex C to Schedule 2; c. Interface with the Training Planning Service (Annex C to Schedule 2) by: 	x				

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	<ul style="list-style-type: none"> i. Managing the loading of individual instructors such that the Training Delivery Service (Type B) is delivered in the most efficient manner; ii. Conducting horizon scanning for new training to identify surges in instructor requirements; and iii. Scrutinising the UEL to identify potential gaps in Military Instructors; iv. Ensuring sufficient instructor resource per competence to allow for: <ul style="list-style-type: none"> 1. short notice increases to the training requirement (In Year Change); and 2. Short notice unavailability of instructors. 					
	<p>3.2 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. Ensure that the Contractor Instructors will continue to be SQEP against the requirements of Annex B to Schedule 2 by: <ul style="list-style-type: none"> i. Ensuring new personnel are SQEP prior to and in time for delivering instruction; ii. ensuring that personnel have appropriate security clearances to work on the security classification of training required by the Authority; and i. Conducting CPD to ensure currency in the subject matter is maintained; b. Monitor and manage the SQEP of Military Instructors by: <ul style="list-style-type: none"> i. Engaging with Establishment COs to release Military Instructors for DTC requirements; and ii. Reporting to the Authority any shortfalls in Military Instructor SQEP. c. Interface with the Training Planning Service (Annex C to Schedule 2) by: <ul style="list-style-type: none"> i. Managing the loading of individual instructors such that the Training Delivery Service (Type B) is delivered in the most efficient manner; ii. Conducting horizon scanning for new training to identify surges in instructor requirements; and iii. Scrutinising the UEL to identify potential gaps in Military Instructors. 		x			
	<p>3.3 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. Ensure that the Contractor Instructors will continue to be SQEP against the requirements of Annex B to Schedule 2 by ensuring new personnel are SQEP prior to and in time for delivering instruction; a. ensure that personnel have appropriate security clearances to work on the security classification of training required by the Authority; and b. Monitor and manage the SQEP of Military Instructors by reporting to the Authority any shortfalls in Military Instructor SQEP. c. Interface with the Training Planning Service (Annex C to Schedule 2). 			x		
	<p>3.4 The Tenderer's Training Services Management Plan will:</p> <ul style="list-style-type: none"> a. ensure that the Contractor Instructors are SQEP against the requirements of Annex B to Schedule 2; b. Monitor the SQEP of Military Instructors; and c. Interface with the Training Planning Service (Annex C to Schedule 2) 				x	
	<p>3.5 In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
4.	<p>4.1 The Tenderer's Training Services Management Plan details how the Tenderer will deliver Direct Support Tasks to Training including how the Tenderer will:</p> <ul style="list-style-type: none"> a. ensure trainees are of the correct input standards by; 	x				

	<ul style="list-style-type: none"> i. conducting pre-tests; and ii. providing refresher training prior to the course. b. prepare the classrooms / training equipment for instruction prior to delivery by: <ul style="list-style-type: none"> i. testing all media equipment for serviceability; ii. carrying out Level 0 maintenance on training equipment as required; and iii. carrying out 1st line maintenance on training equipment as required; c. ensure outside lecturers including escort requirements have been arranged. d. prepare for post course testing by: <ul style="list-style-type: none"> i. arranging for the collection of examinations; ii. ensuring an invigilator is booked for the examination; and iii. making the necessary arrangements for remedial instruction and re-examination. e. check examination results are fed into the BIS (Annex E to Schedule 2) and trend analysis is conducted; f. provide management information to inform Training Optimisation (Annex G to Schedule 2); g. ensure the classroom is prepared for the next instruction on completion of lessons; and h. produce formal feedback to course managers and divisional officers on trainee performance by: <ul style="list-style-type: none"> i. establishing a process for reporting comments; and ii. integrating with the CfTN coaching provision in Annex C to Schedule 2. 					
	<p>4.2 The Tenderer's Training Services Management Plan details how the Tenderer will deliver Direct Support Tasks to Training including how the Tenderer will:</p> <ul style="list-style-type: none"> a. ensure trainees are of the correct input standards by conducting pre-tests; b. prepare the classrooms / training equipment for instruction prior to delivery including: <ul style="list-style-type: none"> i. testing all media equipment for serviceability; and ii. carrying out Level 0 maintenance on training equipment as required; c. ensure outside lecturers including escort requirements have been arranged; d. prepare for post course testing including: <ul style="list-style-type: none"> i. arranging for the collection of examinations; and ii. ensuring an invigilator is booked for the examination; e. check examination results are fed into the BIS (Annex E to Schedule 2) and trend analysis is conducted; f. ensure the classroom is prepared for the next instruction on completion of lessons; and g. produce formal feedback to course managers and divisional officers on trainee performance by establishing a process for reporting comments. 		x			
	<p>4.3 The Tenderer's Training Services Management Plan details how the Tenderer will deliver Direct Support Tasks to Training including how the Tenderer will:</p> <ul style="list-style-type: none"> a. ensure trainees are of the correct input standards; b. prepare the classrooms / training equipment for instruction prior to delivery; c. prepare for post course testing; and d. ensure the classroom is prepared for the next instruction on completion of lessons. 			x		

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	4.4 The Tenderer's Training Services Management Plan will deliver Direct Support Tasks to Training.				x	
	4.5 In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x

RoR: 10

Routine Training Design and Upkeep Service

Aim

1. To select a solution that will deliver a Routine Training Design and Upkeep Service.

Background

2. This RoR covers the requirement to provide a Routine Training Design and Upkeep Service that supports the Authority in the delivery of its courses. This includes routine training design of new training that is produced as part of the business as usual modification and improvement of training. It also includes the upkeep and management of training documentation and associated media.
3. The Authority requires three layers of Training Design service:
 - 3.1. Routine training design as defined in Schedule 2, Annex C, Appendix 1.
 - 3.2. Non-Routine training design as defined in Schedule 2, Annex C, Appendix 1;
 - 3.3. Training document upkeep and management as defined in Schedule 2, Annex C, Appendix 1.
4. This question refers to paragraphs 3.1 and 3.3 only; Non-Routine Training Design paragraph 3.2 is addressed in RoR 11).
5. The requirement for this area is defined in:
 - 5.1. Appendix 1 in Annex C to Schedule 2 (Statement of Requirements)
 - 5.2. Schedule 4 (Change and Change Management)
 - 5.3. Schedule 13 (Authority Audit)
 - 5.4. Schedule 12 (Performance Mechanism)
 - 5.5. JSP 822 Governance and Management of Defence Individual Training and Education

Responses Required:

6. The Tenderer will provide a Training Services Management Plan for Schedule 14 detailing how the Tenderer will deliver a Training Design and Upkeep Service that includes the following:
 - 6.1. Routine Training Design:
 - 6.1.1. how the Tenderer will carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822;
 - 6.1.2. how the Tenderer will manage the training design activities;
 - 6.1.3. how the Tenderer will carry out the administration for any associated contractual changes necessary to include the new course in this SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register.
 - 6.1.4. how the Tenderer will manage unplanned changes to training without any disruption to or delay in training delivery.

6.2. Accreditation Requirements:

6.2.1. how the Tenderer will identify accreditation opportunities for new training when delivering routine training design;

6.2.2. how the Tenderer will maintain accreditation when amendments to training are conducted; and

6.2.3. how the Tenderer will ensuring accreditation remains current and fit for purpose.

6.3. Training Document Upkeep and Management:

6.3.1. how the Tenderer will apply appropriate controls and procedures to ensure that the totality of the formal training provided satisfies the role performance statement in the Document System (Annex C to Schedule 2 (Statement of Requirements));

6.3.2. how the Tenderer will implement actions arising from a minor change or other feedback.

6.4. Training Media:

6.4.1. how the Tenderer will conduct Media development for all routine training design.

6.4.2. how the Tenderer will conduct Media upkeep for existing training produced on a variety of software platforms.

7. The Tenderer will provide details of its Key Personnel for Schedule 11 including:

7.1.1. how the Key Personnel will be employed in delivering and managing the Routine Training Design and Upkeep Service;

7.1.2. the SQEP details of its Key Personnel; and

7.1.3. a description of how the Key Personnel fit into the organogram provided in Schedule 11.

Guidance For Evaluators

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
1.	<p>MANDATORY STATEMENTS</p> <p>1. The Tenderer’s solution will deliver continued compliance with all standards and address all constraints.</p> <p>2. The Tenderer’s solution identifies Key Personnel to deliver the Routine Training Design and Upkeep Service requirement for Schedule 11 (Key Personnel).</p> <p>3. The Tenderer’s solution identifies a process that can be logically followed for Audit purposes (Schedule 13 Authority Audit) and identifies appropriate PIs and KPIs to measure the delivery (Schedule 12 Performance Mechanism).</p>	In the Authority’s opinion all of the statements on the left are true, or				x

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
2.	<p>KEY STATEMENTS</p> <p>2.1 The Tenderer’s Training Services Management Plan details how the Tenderer will:</p> <p>a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by:</p> <p>i. ensuring that the training design solutions blend innovative approaches whilst maintaining Royal Navy ethos;</p> <p>ii. ensuring that student needs are considered in all stages of the training design process;</p> <p>iii. integrating the results and strategic objectives of the Training Optimisation Service whilst carrying out all training design activities;</p> <p>iv. liaising with subject matter experts to deliver accurate technical content;</p> <p>b. manage the training design activities by:</p> <p>i. managing a training design schedule or plan to track progress of training design activities;</p> <p>ii. collaboratively working with the authority on priorities of work to meet delivery dates;</p> <p>iii. forecasting training design activities against equipment or platforms coming into or out of service;</p>	x				

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> iv. having an ability to veer and haul training design resource to meet demand; c. carry out the administration for any associated contractual changes necessary to include the new course in the SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register by: <ul style="list-style-type: none"> i. Ensuring that all of the processes to deliver new training are fully integrated; ii. Ensuring that the training design service includes a process to add or remove courses from the SOR and SOTR/SOTT+ (if in scope of this Contract); iii. Identifying any additional Training Services that are out of scope of this Contract; iv. Providing the Authority with all necessary contract documentation required for additional Training Services that are out of scope; v. Conducting all necessary work to ensure delivery of the new course in its entirety (including all other Training Services required) once the training design output has been approved by the Authority; d. manage unplanned changes to training without any disruption to or delay in training delivery by: <ul style="list-style-type: none"> i. ensuring resource is available to deal with short notice changes to training from UOTRs or other requirements; ii. ensuring that the training design process is fully integrated with the Training Planning Service such that business as usual training continues; iii. considering the impact of equipment and other resource requirements on the training design solution and engaging early with the Authority on any expected increased expenditure; 					
	<p>2.2 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring that the training design solutions blend innovative approaches whilst maintaining Royal Navy ethos; ii. ensuring that student needs are considered in the training design process; iii. integrating the results and strategic objectives of the Training Optimisation Service whilst carrying out all training design activities; iv. liaising with subject matter experts to deliver accurate technical content; b. manage the training design activities by: <ul style="list-style-type: none"> i. managing a training design schedule or plan to track progress of training design activities; ii. requesting the authority prioritises work to meet delivery dates; iii. having an ability to veer and haul training design resource to meet demand; c. carry out the administration for any associated contractual changes necessary to include the new course in the SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register by: <ul style="list-style-type: none"> i. Ensuring that processes to deliver new training are integrated; 		x			

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> ii. Ensuring that the training design service includes a process to add or remove courses from the SOR and SOTR/SOTT+ (if in scope of this Contract); iii. Identifying any additional Training Services that are out of scope of this Contract; iv. Identifying and managing actions to ensure delivery of the new course once the training design output has been approved by the Authority; d. manage unplanned changes to training without any disruption to or delay in training delivery by: <ul style="list-style-type: none"> i. identifying resource to deal with short notice changes to training from UOTRs or other requirements; ii. ensuring that the training design process is integrated with the Training Planning Service such that business as usual training continues; 					
	<p>2.3 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring that the training design solutions maintain Royal Navy ethos; ii. identifying requirements of the Training Optimisation Service; iii. liaising with subject matter experts to deliver accurate technical content; b. manage the training design activities by: <ul style="list-style-type: none"> i. managing a training design schedule or plan to track progress of training design activities; ii. identifying any risks to delivery dates; c. carry out the administration for any associated contractual changes necessary to include the new course in the SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register by: <ul style="list-style-type: none"> i. identifying other dependencies on the new training design solution; ii. Ensuring that the training design service includes a process to add or remove courses from the SOR and SOTR/SOTT+ (if in scope of this Contract); d. manage unplanned changes to training without any disruption to or delay in training delivery by: <ul style="list-style-type: none"> i. identifying resource to deal with short notice changes to training from UOTRs or other requirements; ii. ensuring that the training design process is integrated with the Training Planning Service such that business as usual training continues; 			x		
	<p>2.4 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822; b. carry out the administration for any associated contractual changes necessary to include the new course in the SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register; c. manage unplanned changes to training without any disruption to or delay in training delivery. 				x	

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	2.5 In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
3.	<p>3.1. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. identify accreditation opportunities for new training when delivering routine training design by: <ul style="list-style-type: none"> i. fully integrating with the Accreditation Facilitation Service to identify current accreditation requirements; ii. conducting a scan of accreditation opportunities to identify if any align with the training design output; iii. adjusting the training objectives to ensure they meet both the requirement for training and any new accreditation requirements within cost; iv. assessing if the training design solution is the most effective solution for accreditation purposes whilst meeting the training requirement; b. how the Tenderer will maintain accreditation when amendments to training are conducted by: <ul style="list-style-type: none"> i. mapping the accreditation requirements with the new training design output; ii. identifying changes to accreditation training objectives during the training design process and identifying if changes will affect accreditation; iii. collaboratively working with the Authority to manage any changes to accreditation requirements; iv. conducting all work necessary to ensure accreditation requirements continue to be met (including work conducted within the Accreditation Facilitation Service); c. how the Tenderer will ensuring accreditation remains current and fit for purpose by: <ul style="list-style-type: none"> i. conducting horizon scanning on the current accreditation opportunities available for the training design output; ii. identifying if future training design solutions could provide alternative accreditation opportunities; iii. liaising with awarding bodies to identify current trends and future changes in accreditation that may affect the way training design is conducted; 	x				
	<p>3.2. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. identify accreditation opportunities for new training when delivering routine training design by: <ul style="list-style-type: none"> i. integrating with the Accreditation Facilitation Service to identify current accreditation requirements; ii. adjusting the training objectives to ensure they meet both the requirement for training and any new accreditation requirements within cost; b. how the Tenderer will maintain accreditation when amendments to training are conducted by: <ul style="list-style-type: none"> i. mapping the accreditation requirements with the new training design output; 		x			

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> ii. identifying changes to accreditation training objectives during the training design process; iii. liaising with the Authority on any changes to accreditation requirements; iv. conducting all work necessary to ensure accreditation requirements continue to be met (including work conducted within the Accreditation Facilitation Service); c. how the Tenderer will ensuring accreditation remains current and fit for purpose by: <ul style="list-style-type: none"> i. conducting horizon scanning on the current accreditation opportunities available for the training design output; ii. identifying if future training design solutions could provide alternative accreditation opportunities; 					
	<p>3.3. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. identify accreditation opportunities for new training when delivering routine training design by integrating with the Accreditation Facilitation Service to identify current accreditation requirements; b. how the Tenderer will maintain accreditation when amendments to training are conducted by: <ul style="list-style-type: none"> i. mapping the accreditation requirements with the new training design output; ii. identifying changes to accreditation training objectives during the training design process; c. how the Tenderer will ensuring accreditation remains current and fit for purpose by conducting horizon scanning on the current accreditation opportunities available for the training design output; 			x		
	<p>3.4. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. identify accreditation opportunities for new training when delivering routine training design; b. how the Tenderer will maintain accreditation when amendments to training are conducted; and c. how the Tenderer will ensuring accreditation remains current and fit for purpose. 				x	
	<p>3.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
4.	<p>4.1. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. apply appropriate controls and procedures to ensure that the totality of the formal training provided satisfies the role performance statement in the Document System (Annex C to Schedule 2 (Statement of Requirements))by: <ul style="list-style-type: none"> i. proactively managing a Document Review and Management Plan to identify and forecast programmed reviews of the training documentation system; ii. identifying any programmed reviews that coincide with training design and re-programming appropriately so that 	x				

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> the review can inform or confirm the training design output; iii. ensuring that the results of the Training Quality Assurance Service are fed into the reviews; iv. ensuring that configuration control is maintained against the training document system; v. monitoring future changes in equipment or platforms coming into or out of the Naval Service; vi. assisting the Authority in planning and conducting large scale training reviews and branch reviews; vii. conducting CPD and liaising with Authority SMEs to ensure currency in Naval Service operational and workplace delivery; viii. conducting regular proof reading of training documentation to identify errors or inconsistencies; b. how the Tenderer will implement actions arising from a minor change or other feedback by: <ul style="list-style-type: none"> i. implementing a controlled change procedure for Contractor Instructors and Military Instructors to make small changes to the training documentation when errors are found; ii. identifying if changes affect other training design activities, other training documents or other training document systems; iii. identifying if changes affect any other Training Services in the Contract; iv. carrying out the necessary actions to deliver the changes to the Training Services; v. obtaining regular feedback from a variety of sources on the accuracy and currency of training; vi. implementing actions from the feedback where appropriate; vii. fully integrating with all other Training Services procedures when carrying out changes; 					
	<p>4.2. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. apply appropriate controls and procedures to ensure that the totality of the formal training provided satisfies the role performance statement in the Document System (Annex C to Schedule 2 (Statement of Requirements))by: <ul style="list-style-type: none"> i. managing a Document Review and Management Plan to identify and forecast programmed reviews of the training documentation system; ii. ensuring that the results of the Training Quality Assurance Service are fed into the reviews; iii. ensuring that configuration control is maintained against the training document system; iv. monitoring future changes in equipment or platforms coming into or out of the Naval Service; v. liaising with Authority SMEs to ensure currency in Naval Service operational and workplace delivery; vi. conducting regular proof reading of training documentation to identify errors or inconsistencies; b. how the Tenderer will implement actions arising from a minor change or other feedback by: 		x			

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> i. implementing a controlled change procedure for Contractor Instructors and Military Instructors to make small changes to the training documentation when errors are found; ii. identifying if changes affect other training design activities, other training documents or other training document systems; iii. obtaining feedback on the accuracy and currency of training; iv. implementing actions from the feedback where appropriate; v. integrating with all other Training Services procedures when carrying out changes; 					
	<p>4.3. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. apply appropriate controls and procedures to ensure that the totality of the formal training provided satisfies the role performance statement in the Document System (Annex C to Schedule 2 (Statement of Requirements))by: <ul style="list-style-type: none"> i. managing a Document Review and Management Plan to identify and forecast programmed reviews of the training documentation system; ii. ensuring that the results of the Training Quality Assurance Service are fed into the reviews; iii. ensuring that configuration control is maintained against the training document system; iv. liaising with Authority SMEs to ensure currency in Naval Service operational and workplace delivery; b. how the Tenderer will implement actions arising from a minor change or other feedback by: <ul style="list-style-type: none"> i. implementing a controlled change procedure for Contractor Instructors and Military Instructors to make small changes to the training documentation when errors are found; ii. identifying if changes affect other training design activities, other training documents or other training document systems; iii. obtaining feedback on the accuracy and currency of training; 			x		
	<p>4.4. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. apply appropriate controls and procedures to ensure that the totality of the formal training provided satisfies the role performance statement in the Document System (Annex C to Schedule 2 (Statement of Requirements)); and b. how the Tenderer will implement actions arising from a minor change or other feedback. 				x	
	<p>4.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
5.	<p>5.1. The Tenderer's Training Services Management plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. Conduct media development for all routine training design by: <ul style="list-style-type: none"> i. Fully integrating with all other training design activities; ii. Ensuring that the media is appropriate to and aligns with the strategic objectives of the Training Optimisation Service; iii. Conducting horizon scanning to identify new media delivery platforms and design processes to ensure the media is future proof; iv. Identifying if the media solution provides value for money in delivering the training requirement; v. Considering innovative approaches to media development and delivery; vi. Ensuring that a variety of media solutions are considered during each stage of the training design activity; vii. Ensuring that the Authority infrastructure supports the media solution; viii. Liaising with the Authority and the Training Optimisation Service to identify any opportunities for enhancing the Authority's media delivery infrastructure; b. Conduct media upkeep for existing training produced on a variety of software platforms by: <ul style="list-style-type: none"> i. Ensuring that the media remains appropriate to and aligns with the strategic objectives of the Training Optimisation Service; ii. Carrying out all necessary work to update the media as required by the Training Optimisation Service; iii. Carrying out horizon scanning to identify equipment or platforms coming into or out of service that will affect the media content; iv. Carrying out all necessary work to update the media against equipment or platforms coming into or out of service; v. Ensuring that the media is at the latest version of software updates; vi. Carrying out updates to the media to meet the latest version; vii. implementing a controlled change procedure for Contractor Instructors and Military Instructors to make small changes to the training media when errors are found and where specialist software development skills are not required; viii. integrating fully with the Future Training Unit to ensure that new media is brought into the upkeep process seamlessly and without any loss to training; 	x				

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<p>5.2. The Tenderer's Training Services Management plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. Conduct media development for all routine training design by: <ul style="list-style-type: none"> i. integrating with all other training design activities; ii. ensuring that the media is appropriate to and aligns with the strategic objectives of the Training Optimisation Service; iii. conducting horizon scanning to identify new media delivery platforms and design processes to ensure the media is future proof; iv. identifying if the media solution provides value for money in delivering the training requirement; v. ensuring that other media solutions are considered during training design activity; vi. ensuring that the Authority infrastructure supports the media solution; b. Conduct media upkeep for existing training produced on a variety of software platforms by: <ul style="list-style-type: none"> i. ensuring that the media remains appropriate to and aligns with the strategic objectives of the Training Optimisation Service; ii. Carrying out work to update the media as required by the Training Optimisation Service; iii. Carrying out horizon scanning to identify equipment or platforms coming into or out of service that will affect the media content; iv. Carrying out work to update the media against equipment or platforms coming into or out of service; v. Identifying if the media is at the latest version of software updates; vi. Carrying out updates to the media to meet the latest version; vii. implementing a controlled change procedure for small changes to the training media when errors are found; viii. integrating with the Future Training Unit to ensure that new media is brought into the upkeep process without any loss to training; 		x			
	<p>5.3 The Tenderer's Training Services Management plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. conduct media development for all routine training design by: <ul style="list-style-type: none"> i. integrating with all other training design activities; ii. ensuring that the media is appropriate to and aligns with the strategic objectives of the Training Optimisation Service; iii. ensuring that alternative media solutions are considered during each stage of the training design activity; iv. ensuring that the Authority infrastructure supports the media solution; 			x		

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> b. conduct media upkeep for existing training produced on a variety of software platforms by: <ul style="list-style-type: none"> v. ensuring that the media remains appropriate to and aligns with the strategic objectives of the Training Optimisation Service; vi. carrying out work to update the media as required by the Training Optimisation Service; vii. Identifying if the media is at the latest version of software updates; viii. Carrying out updates to the media to meet the latest version; 					
	5.4. The Tenderer's Training Services Management plan details how the Tenderer will: <ul style="list-style-type: none"> a. conduct media development for all routine training design; b. conduct media upkeep for existing training produced on a variety of software platforms. 				x	
	5.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.					x
6.	6.1. The Tenderer's Training Services Management Plan details how the Tenderer will: <ul style="list-style-type: none"> a. employ Key Personnel in delivering and managing the Routine Training Design and Upkeep Service by: <ul style="list-style-type: none"> i. ensuring that the Key Personnel have a proven record of delivering modern training design utilising a variety of delivery platforms and solutions; ii. ensuring that Key Personnel have suitable qualifications directly relating to the design of training in a modern and flexible environment; iii. ensuring that the Key Personnel are experienced in using all of the software development tools required to deliver the service; iv. ensuring that Key Personnel understand the requirements of each training design activity stage and how these stages combine to produce a full training document system; v. ensuring that Key Personnel have appropriate security clearances to work on the security classification of training required by the Authority; b. manage an in-house training design team that carries out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring the team is sufficiently resourced to deliver the requirement; ii. identifying the amount of resource required to deliver each training design and document upkeep activity such that the activities can be programmed appropriately in order to meet deadlines; 	x				

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> iii. ensuring the training designers have appropriate security clearances to work on the security classification of training required by the Authority; iv. ensuring that the training designers have a proven track record of using current training design techniques; v. ensuring that the team work collaboratively with the Authority subject matter experts to ensure technical accuracy of training design solutions; vi. ensuring that each member of the team understands the relationship of the training design output with the other Training Services in the contract (e.g. Training Planning; Training Facilitation etc.); vii. conducting CPD to ensure that each member of the team continues to develop their skills and knowledge in training design and wider learning theories; viii. ensuring that all training designers understand and implement the objectives of Training Optimisation when conducting training design activities; ix. ensuring that all new training designers are given appropriate training to deliver solutions that meet the objectives of Training Optimisation; 					
	<p>6.2. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. employ Key Personnel in delivering and managing the Routine Training Design and Upkeep Service by: <ul style="list-style-type: none"> i. ensuring that the Key Personnel have experience of delivering modern training design utilising a variety of delivery solutions; ii. ensuring that Key Personnel have suitable qualifications directly relating to the design of training in a modern and flexible environment; iii. ensuring that the Key Personnel are experienced in using software development tools; iv. ensuring that Key Personnel understand the requirements of each training design activity stage and how these stages combine to produce a full training document system; v. ensuring that Key Personnel have appropriate security clearances to work on the security classification of training required by the Authority; b. manage an in-house training design team that carries out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring the team is sufficiently resourced to deliver the requirement; ii. ensuring the team is able to identify the amount of resource required to deliver each training design and document upkeep activity such that the activities can be programmed appropriately in order to meet deadlines; 		x			

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> iii. ensuring the training designers have appropriate security clearances to work on the security classification of training required by the Authority; iv. ensuring that the training designers have a proven track record of using training design techniques; v. ensuring that the team work collaboratively with the Authority to ensure technical accuracy of training design solutions; vi. ensuring that each member of the team understands the relationship of the training design output with the other Training Services in the contract (e.g. Training Planning; Training Facilitation etc.); vii. conducting CPD to ensure that each member of the team continues to develop their skills and knowledge in training design; viii. ensuring that all training designers implement the objectives of Training Optimisation when conducting training design activities; ix. ensuring that all new training designers are given appropriate training to deliver solutions that meet the objectives of Training Optimisation; 					
	<p>6.3. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. employ Key Personnel in delivering and managing the Routine Training Design and Upkeep Service by: <ul style="list-style-type: none"> i. ensuring that the Key Personnel have experience of delivering training design; ii. ensuring that Key Personnel have suitable qualifications directly relating to the design of training; iii. ensuring that the Key Personnel have knowledge of software development tools; iv. ensuring that Key Personnel understand the requirements of each training design activity stage; v. ensuring that Key Personnel have appropriate security clearances to work on the security classification of training required by the Authority; b. manage an in-house training design team that carries out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring the team is sufficiently resourced to deliver the requirement; ii. ensuring the team is able to identify the amount of resource required to deliver each training design and document upkeep activity such that the activities can be programmed appropriately in order to meet deadlines; iii. ensuring the training designers have appropriate security clearances to work on the security classification of training required by the Authority; iv. ensuring that the training designers have experience of using training design techniques; 			x		

	Scoring Guidance	Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable
	<ul style="list-style-type: none"> v. ensuring that all training designers implement the objectives of Training Optimisation when conducting training design activities; vi. ensuring that all new training designers are given appropriate training to deliver solutions that meet the objectives of Training Optimisation; 					
	<p>6.4. The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. employ Key Personnel in delivering and managing the Routine Training Design and Upkeep Service; and b. manage an in-house training design team that carries out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822. 				x	
	<p>6.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x

RoR: 11

Training Design Non-Routine

Aim

1. To select a Tenderer who will manage the non-routine training design service including contract performance management.

Background

2. This ROR covers the delivery of non-routine training design as described in Schedule 2 (SOR) Annex C. There is an expectation of a three tier delivery system, including sub-contractor involvement in much of the non-routine training design, to both increase flexibility and to maintain access to leading edge developments in training delivery. The three tiers will need to be managed to provide the required flexibility and adaptability.

Key Assumptions

3. In addition to the assumptions contained within Schedule 2 (SOR), Annex C the following assumptions for the Training Design Framework are to be factored into the Tenderers' responses:
 - 3.1. The Tenderer is to ensure continuity of TD services.
 - 3.2. A three tier approach to the service provision will be taken in accordance with Schedule 2, Annex C.
 - 3.3. The Tenderer's in-house team will be manned to ensure delivery of routine training design.
 - 3.4. The proposals will have the necessary flexibility and adaptability to meet future non-routine training design requirements including major fluctuations in volume of requirements.
 - 3.5. The delivery of Optimisation will be through open competition.
 - 3.6. The proposed routes to market will be open and fair.
 - 3.7. The accreditation requirements will be met for non-routine training design.

Underpinning Assumptions, Dependencies and Planning Factors

4. The Tenderer is to list all his assumptions, dependencies and additional planning factors on which his prices are based and is to identify all risks to the delivery of the non-routine training design.

Responses Required

5. Explain how the Tenderer will set up call off arrangements for non-routine training design requirements that are urgent
6. Explain how the Tenderer will run competitions for non-urgent non-routine training design requirements
7. Explain how these services will be integrated within the delivery of a routine training design service (ROR 10) that includes:

- 7.1. Management of a training design team that carries out the mandated training design activities in accordance with the Defence Systems Approach to Training.
- 7.2. Management and maintenance of all training design processes in support of training design resulting from a new requirement or a change to existing requirements resulting from a Major Change.
- 7.3. Comprehensive methodology to manage unplanned changes to training without any disruption to or delay in training delivery.
8. Explain how the Tenderer will manage Interfaces between sub-contractors.
9. Describe how sub-contractor quality and compliance will be maintained.

Guidance for Evaluators

Scoring Guidance		Very High Confidence	High Confidence	Good Confidence	Acceptable	Unacceptable	
1.	<p>MANDATORY STATEMENTS</p> <ol style="list-style-type: none"> 1. Urgent non-routine Training Design will be delivered within the required timescales. 2. Non-urgent, non-routine Training Design will be delivered within the required timescales. 3. The outsourcing process will provide opportunity for Small and Medium size Enterprise involvement. 4. Use of outsourcing will balance the use of Tenderer in-house resources and sub-contractors. 5. The provision of non-routine Training Design will not affect the overall continuity of the Training Design service. 6. Non-routine Training Design processes will follow mandated DSAT requirements. 7. The outsourcing process applied by the Tenderer will be open and fair. 	<p>In the Authority's opinion all of the statements on the left are true, or</p>					x
2.	<p>KEY STATEMENTS</p> <p>2.1 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ol style="list-style-type: none"> b. carry out the Non Routine training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by demonstrating <ol style="list-style-type: none"> i. ensuring that the training design solutions blend innovative approaches whilst maintaining Royal Navy ethos; ii. ensuring that student needs are considered in all stages of the training design process; iii. integrating the results and strategic objectives of the Training Optimisation Service whilst carrying out all training design activities; iv. liaising with subject matter experts to deliver accurate technical content; c. manage the training design activities by: <ol style="list-style-type: none"> i. managing a training design schedule or plan to track progress of training design activities; ii. collaboratively working with the authority on priorities of work to meet delivery dates; iii. recognise the additional value added benefit of using SME providers for specific training needs iv. having an ability to blend in house and sub-contracted design resource to meet demand; 	x					

	<p>2.6 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring that the training design solutions blend innovative approaches whilst maintaining Royal Navy ethos; ii. ensuring that student needs are considered in the training design process; iii. integrating the results and strategic objectives of the Training Optimisation Service whilst carrying out all training design activities; iv. liaising with subject matter experts to deliver accurate technical content; b. manage the training design activities by: <ul style="list-style-type: none"> i. managing a training design schedule or plan to track progress of training design activities; ii. requesting the authority prioritises work to meet delivery dates; iii. having an ability to blend in house and sub-contracted design resource to meet demand 		x			
	<p>2.7 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822 by: <ul style="list-style-type: none"> i. ensuring that the training design solutions maintain Royal Navy ethos; ii. identifying requirements of the Training Optimisation Service; iii. liaising with subject matter experts to deliver accurate technical content; b. manage the training design activities by: <ul style="list-style-type: none"> i. managing a training design schedule or plan to track progress of training design activities; ii. identifying any risks to delivery dates; iii. carry out the administration for any associated contractual changes necessary to include the new course in the SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register by identifying other dependencies on the new training design solution; 			x		
	<p>2.8 The Tenderer's Training Services Management Plan details how the Tenderer will:</p> <ul style="list-style-type: none"> a. carry out the mandated training design activities in accordance with the Defence Systems Approach to Training (DSAT) in JSP 822; b. carry out the administration for any associated contractual changes necessary to include the new course in the SOR and SOTR/SOTT+ and any new equipment associated with the course onto the GFA Register; 				x	
	<p>2.9 In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
3.	<p>3.6. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Embedded Company policy and processes for running and managing open competitive procurements ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding 	x				

	<ul style="list-style-type: none"> iii. Experienced procurement team delivering the sub contract TD iv. Mature process for managing sub-contractor performance v. Mature process for managing sub-contractor quality 					
	<p>3.7. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Embedded Company processes for running and managing open competitive procurements ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Experienced procurement team delivering the sub contract TD iv. Mature process for managing sub-contractor performance v. Mature process for managing sub-contractor quality 		x			
	<p>3.8. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Embedded Company processes for running and managing open competitive procurements ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Experienced procurement team delivering the sub contract TD iv. Mature process for managing sub-contractor performance v. Mature process for managing sub-contractor quality 			x		
	<p>3.9. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Embedded Company processes for running and managing open competitive procurements ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Process for managing sub-contractor performance iv. Process for managing sub-contractor quality 				x	
	<p>3.10. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x
4.	<p>4.1. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Embedded Company policy and processes for identifying and employing Small to Medium Enterprises ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Experienced procurement team procuring SMEs including bespoke terms and conditions iv. Mature process for managing SME performance v. Mature process for managing SME quality 	x				

<p>4.2. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Embedded Company processes for identifying and employing Small to Medium Enterprises ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Experienced procurement team procuring SMEs iv. Mature process for managing SME performance v. Mature process for managing SME quality 		x			
<p>4.3. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Company processes for identifying and employing Small to Medium Enterprises ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Procurement team procuring SMEs iv. Process for managing SME performance v. process for managing SME quality 			x		
<p>4.4. The Tenderer's Training Services Management Plan details how the Tenderer will outsource through competition the provision of Non Routine Training Design.</p> <ul style="list-style-type: none"> i. Processes for employing Small to Medium Enterprises ii. Evidence of a robust system for managing potential conflict of interest with any in house bidding iii. Process for managing performance and quality 				x	
<p>4.5. In the Authority's opinion the conditions under which the scores above will be awarded have not been met.</p>					x