



Education & Skills  
Funding Agency

# **RESEARCH & EVALUATION SPECIFICATION**

**Evaluation of The National Careers Service  
through a Mystery Shopping Approach**

**September 2018**

# **CROWN COMMERCIAL SERVICE RESEARCH FRAMEWORK AGREEMENT**

## **Invitation to Tender**

### **Specification for the following:**

#### **Evaluation of the National Careers Service through a Mystery Shopping Approach**

You are invited to tender to carry out the mystery shopping project on behalf of the National Careers Service as specified in this document

You should note that:

- This project is tendered through the Crown Commercial Service Research Framework **RM6018** Agreement (Face-to-Face, Online, Telephone and General Selection) on behalf of the Education and Skills Funding Agency (ESFA)
- The ITT does not imply a commitment to contract
- ESFA reserves the right not to award an Assignment Contract as a result of this ITT
- No Assignment Contract shall be formed until the selection contractor receives a Commissioning letter signed by a duly authorised representative of the Customer
- If you choose to tender then you are required to bear all the costs incurred by you in the preparation of that tender

All information supplied in the specification should be treated as confidential and disseminated only on a “need to know” basis.

Enquiries about this invitation to tender should be made using the messaging facility on the e-tendering portal.

### **The Education and Skills Funding Agency**

This project is being tendered through the Crown Commercial Service Research Framework RM6018; however, it will be led, managed and funded by the Education and Skills Funding Agency.

The Education and Skills Funding Agency, launched on 1 April 2017, brings together the existing responsibilities of the Education Funding Agency (EFA) and Skills Funding Agency (SFA), to create a single funding agency accountable for funding education and training for children, young people and adults. The ESFA is an Executive Agency of the Department for Education (DfE).

The ESFA is accountable for £61bn of funding for the education and training sector, providing assurance that public funds are properly spent, achieve value for money for the tax payer and deliver the policies and priorities set by the Secretary of State.

The ESFA regulates academies, FE Colleges and training providers, intervening where there is risk of failure or where there is evidence of mismanagement of public funds, and delivers major projects and operates key services in the education sector, such as school capital programmes, the National Careers Services and the National Apprenticeship Service.

The ESFA works closely with Policy colleagues in the DfE, particularly the infrastructure and Funding Directorate on schools and the Tertiary Education Directorate on young people, adults, apprenticeships and skills.

We also:

- maintain Individual Learner Record (ILR) data
- publish data and datasets to support planning and performance reporting in FE
- support the Learning Records Service, who maintain Unique Learner Numbers (ULNs) and Personal Learning Records (PLRs)

## **Background**

### **The National Careers Service**

The National Careers Service sits at the heart of the Careers Strategy (2017) and reflects the ambitions of the Industrial Strategy. There is a clear focus on improving social mobility through co-ordination activity and effective working between the National Careers Service and a range of partners including the Careers and Enterprise Company, Combined Authorities, employers, Local Enterprise Partnerships (LEPs) and schools and colleges.

The Area Based National Careers Service was launched in April 2012 and alongside apprenticeships, traineeships, 24 plus advanced learning loans and a range of other initiatives represents an important strand in the Government's ambition to:

- Grow an internationally competitive skills base
- Create sustainable jobs and foster progression to support economic growth
- Create a dynamic and efficient skills system with informed learners and ownership by employers, supported by high quality, impartial careers advice
- Prioritise help to apprentices, young adults, low-skilled other groups that need skills support if they are to make a vital contribution to society

It is within the context of quality assurance and continuous improvement that the Agency's National Careers Service Team has designed and implemented a comprehensive quality programme for the National Careers Service. The continuous improvement programme drives improvements across the service by analysing customer experience, identifying and systematically

sharing best practice and regularly assessing the performance, quality and impact of the frontline staff who deliver the service.

The Education and Skills Funding Agency, which manages the National Careers Service, is committed to helping people realise their potential and get the skills they need to get on in life and work, supported by high quality, impartial careers advice. The Agency is also responsible to actively help towards the Government target of 3 million apprenticeship starts by 2020.

The Service is currently managed by 7 prime contractors covering 12 geographical areas, and monitored by the Education and Skills Funding Agency. The National Careers Service telephone helpline for adults and young people is delivered across England by one contractor.

The redesigned National Careers Service, which will commence on 1 October 2018, will operate across 9 redrawn regional areas. It will deliver an impartial information, advice and guidance offer to all customers together with a greater focus on digital tools and enhanced support to customers facing particularly barriers and challenges.

The National Careers Service provides high quality information and impartial, professional careers advice and guidance to those who need it, it is available across England to any young person (aged 13 years old and over) or adult. The service is delivered under one consistent national brand but is shaped locally to respond to the needs of local partners and employers.

The service is delivered via three channels; customers can speak to an adviser, either on the telephone or face-to-face and they can access the National Careers Service online (where there is also the facility to email an adviser). The three channels operate as a single integrated service where customers can be referred/ signposted between them to provide the support that best suits their needs. Approximately 1,300 advisers deliver the service across the telephone, face-to-face and web channels to around one million customers each year.

The National Careers Service helps people to think flexibly about the skills that may be needed in the future, including helping them make realistic plans and choices to realise their potential in an ever changing economy. The service plays a direct and active role in connecting local people to local opportunities, working in close partnership with local business and educational institutions.

The vision is for millions of individuals to enjoy more rewarding working lives, and to create a culture where career development and acquiring new skills is the norm. In hard economic terms the service is funded to ensure that citizens have the skills and careers advice they require to progress in learning and work and therefore contribute to the economic growth of the country.

The Education and Skills Funding Agency published an invitation to tender (ITT) in February 2018 to procure a new area based National Careers Service from 1 October 2018. Contracts for the current service will end on 30 September 2018.

The future service chimes strongly with the Careers Strategy's focus on the timely delivery of high quality careers information and advice to help people negotiate the learning, training and employment opportunities that will feature throughout their working lives.

The National Careers Service is a major partner in helping the Careers Strategy to deliver its commitment to ensure that everyone has the appropriate advice and guidance to move into the education, training or employment opportunities that matches their skills, interests and aspirations.

The National Careers Service will play a lead role in fundamentally changing how people are inspired to make better, informed career choices, lift their aspirations and make learning choices that reflect future aspirations.

The overarching ambition for the National Careers Service is to support increased social mobility, productivity and earning power for thousands of customers who need help to navigate the learning, employment and skills landscape. Regardless of background and circumstances the National Careers Service ensures that customers are;

- Informed and aware of the wide range of learning and work opportunities that are available to them;
- Better able to independently manage their careers, identify opportunities and respond to challenges in the employment and training market;
- Are aware of and able to access accurate and up to date information about careers and learning from the National Careers Service whenever they need it; and
- Are guided and supported to use a range of high quality digital tools that will enable them to further develop their career management skills and progress in learning and work.

The National Careers Service plays a critical role in empowering and engaging unemployed adults and adults at a distance from the labour market. It supports individuals in transition to and within the labour market, and helps them to make effective use of their skills and be resilient in the face of change. The evidence suggests that career guidance is effective in re-engaging unemployed people in work.

From 1 October 2018 the National Careers Service will place particular emphasis on the following:

- a. Customer focus – a greater reliance on user research and empirical data about customer needs and experiences to drive continuous improvement;
- b. Digital First – the development of intuitive, customer friendly digital tools that enable customers to navigate a greater part of their journey into learning and work independently;
- c. Analytics – more intelligent and precise use of data to drive improvements and make the service more responsive;
- d. Enabling partnerships – the National Careers Service will continue to play a key enabling, facilitating and engagement role in the employment and skills market; and
- e. Research and evaluation – the ESFA will continue to commission independent research and evaluation to ensure the quality, impact and effectiveness of the service is maintained and built on.

#### **Revised National Careers Service customer priority groups from 1 October 2018**

**Primary Customers** are adults living or working in England, aged 19 or over (or aged 18 for those who are not in education employment or training) with a focus on the following Priority Group Customers.

- i. 18-24 year olds not in education, employment or training (NEETs);
- ii. Low-skilled adults without a level 2 qualification;
- iii. Adults who have been unemployed for more than 12 months;
- iv. Single parents with at least one dependent child living in the same household.
- v. Adults and special educational needs and/or disabilities; and
- vi. Adults aged 50 years and over who are unemployed or at demonstrable risk of unemployment.

Without exception, all young people, that is customers aged 13-18 years, are able to access comprehensive careers information, advice and guidance via telephone or web chat.

**Secondary Customers** are people who support the above primary customers. These consist of intermediaries such as teachers, parents, customer advocates, Jobcentre Plus work coaches and others.

## **The importance of quality**

The Education and Skills Funding Agency is committed to ensuring that its investment in the National Careers Service is realised through customers accessing high quality careers information and advice from professional, highly skilled, careers advisers.

The Agency is committed to driving up the quality of the National Careers Service. The standard contract management and quality assurance processes ensures that sound arrangements are in place to deliver a good service. This is complemented by ongoing research into customer satisfaction and progression.

Prime Contractors must ensure that they (and their subcontractors) meet the minimum quality requirements for the delivery of impartial careers information, advice and guidance as part of the core offer of the National Careers Service. These are;

- a. Holding and retaining the matrix Standard. 100% of organisations delivering the Area Based Service to be accredited to the matrix Standard within six months of the start of the Contract.
- b. Being subject to and complying with the Ofsted Common Inspection Framework for Further Education and Skills;
- c. Compliance and full participation with any ESFA initiatives, research or programmes to assess, measure and improve the quality of the National Careers Service; and

The focus on quality is further underlined by the fact that all National Careers Service Prime Contractors participated in a round of Ofsted inspections that concluded in spring 2017. All National Careers Service Prime Contractors were rated good and two were rated outstanding.

It is within this context of quality assurance and inspection activity that the Agency introduced a programme of activity and research that will support continuous quality improvement across the National Careers Service by monitoring, evaluating and providing feedback about the actual quality of service received by customers from National Careers Service face-to-face and telephone advisers.

Information will be gathered by conducting market research that uses a mystery shopping methodology. This will involve training and briefing a diverse range of 'mystery shoppers'/covert assessors who will be able to make informed judgements about the usefulness, quality and consistency of careers information and advice they receive from face-to-face and telephone channel advisers. The successful contractor will have access to a mix of covert assessors who come from different ethnic backgrounds, vary in age from 18 years up to about 60 years of age. There will be roughly equal numbers of males and females and a proportion of the assessors will be competent and feel comfortable about adopting the personas of parents, teachers or employers, and so on as required.

The successful contractor will need to be flexible, forward thinking and able to adapt their approach, messages and methodology to fit the circumstances as they find them

## **Aims and objectives of the Project**

The key purpose of this evaluation project is to gather real-time, objective intelligence about the *actual* (not Ofsted or matrix influenced) end to end customer service experience from informed, trained participant observers. This should provide a flavour, alongside other research and data, about how well core elements of the customer interview process is working.

In the context of this work the term ‘customer’ will usually refer to ordinary members of the public who access the service via the website or by speaking on the telephone or meeting with an adviser face to face. However, the term ‘customer’ can include employers, teachers, providers and parents.

This latter group of customer roles will feature more prominently in the evaluation as covert assessor roles when the project focuses on evaluating how well the service engages with schools, colleges, LEPs and employers.

The process of developing and delivering this work will help the Education and Skills Funding Agency to better define what good and excellent front line delivery looks like; isolate the improvement factors we wish to measure; and help the Education and Skills Funding Agency to gain a strong sense of how often our advisers deliver good/excellent sessions and consider what elements of the service we need to improve to make the service consistently good or excellent.

## **Aims**

The overall aim of the Mystery Shopping evaluation project is to enable the Education and Skills Funding Agency to make a significant and ongoing contribution to the following broader aims of the National Careers Service:

- to accelerate the rate of prime contractor improvement and adjustment to the redesigned National Careers Service
- Identify, evaluate and influence new trends and approaches to customer engagement, intervention and referral
- to ‘nudge’ prime contractor behaviour towards prioritising the improvement of specific aspects of the customer journey
- Contribute to improvement in satisfaction and progression ratings and positive outcomes for National Careers Service customers
- Raise the standard and quality of customer service across a number of key operational areas.
- Support National Careers Service prime contractors who are committed to moving their management and delivery of the service from good to outstanding



- Evidence and measure improvements in the National Careers Service as a result of the Mystery Shopping project

## Objectives

The project has five main objectives:

1. To gain clear and sophisticated intelligence about the key aspects of front line service delivery outlined in the brief with findings that we can analyse, act on and feed back to prime contractors and partners with confidence.

**Output:** Quarterly in-depth, thematic, topic-specific, qualitative and quantitative summary reports with analysis, statistical dashboards, PowerPoint presentations (where appropriate) and recommendations.

2. To use the mystery shopping process as a driver for quality improvement across the service.

**Output:** Quarterly summary reports that identify factors and provide insights into adviser and area based contractor behaviours, practices and processes that can be regarded as good practice and contribute to greater customer satisfaction. Including recommendations for improvements in services based on the collected data.

3. To test the impact of customer facing initiatives and developments in the Agency's Best Practice Programme (e.g. Customer Charter).

**Output:** to be achieved via outputs 1 and 2 above and liaison with the Agency and Best Practice programme contractor.

4. To inform ongoing improvements to the customer experience during the life of the project.

**Output:** to be achieved via outputs 1 and 2 above.

5. To align with and test the validity of aspects of the customer satisfaction and progression surveys.

**Output:** to be achieved via outputs 1 and 2 above and liaison with the Agency and customer satisfaction and progression survey contractor.

Our intention is to develop and deliver an enabling service that advises, informs and empowers customers to develop the resources and resilience to manage and make informed decisions about their own careers and learning. And to ensure that all National Careers Service staff achieves a minimum level of awareness, knowledge and competence in the areas of identifying customer needs, using labour market information (LMI) effectively, building customer motivation and working effectively with employers and other stakeholders.

## Methodology

The Agency recognised from the outset that this is a complex project with significant challenges in the areas of ID verification, data integrity, creating authentic customer scenarios, shopper briefing/training and developing criteria and quality assurance processes that support consistent assessment of service quality by the assessor/shoppers.

Based on experience of the previous mystery shopping contract, the suggested methodology below and figures provide an approach and a realistic starting point to enable bidders to consider the typical level of resource, planning and expertise that will be required for this project; and for the Agency to compare the value of bids and approaches. The Agency recognises that flexibility will be required on both sides in order to successfully deliver this project.

The contractor must have the **capacity, flexibility and willingness** to adapt their approach and methodology, occasionally at short notice, to accommodate the challenges and changing demands of a new delivery model from January 2019 and the requirements of the Agency, key stakeholders and partners.

We would welcome bidders' alternative suggestions and approaches to delivering this work providing that they meet the project aims and objectives. Bidders will be expected to provide a rationale to support any alternative approach they suggest.

The suggested methodology for delivering the project is as follows:

### Face to face assessments (from January 2019 to 31 March 2019)

Following the inception meeting with the successful contractor in November 2018, the contractor will work closely with the Agency to agree the scope and final design of the project. We estimate that the set up period for scoping, preparation, sampling, tool design, etc before fieldwork begins for both the face to face and telephone covert assessments is likely to be four to six weeks.

During this time the contractor will focus on activities such as:

- Creation of appropriate customer scenarios/scripts
- Creation of roles/personas for assessors
- Creation of assessment/recording templates/scoring grids
- Confirming covert assessor profiles, numbers and availability
- Delivering training for assessors
- Confirming area based and subcontractor locations and opening hours
- Agreeing format and timing of reports and presentations, etc
- If appropriate, short term pilots will be run in 2 areas to identify issues and resolve snags, etc

We would expect the fieldwork to properly begin in early January 2019

From January 2019 until end of January 2020 the contractor will conduct 20 covert assessor visits per month to each of the 9 (new) area regions which will be managed by 6 or more National Careers Service area based contractors (ABCs) from October 2018. The 9 regional delivery areas are as follows:

- East of England & Buckinghamshire
- East Midlands & Northamptonshire
- North East & Cumbria
- North West
- London
- South East
- South West & Oxfordshire
- West Midlands & Staffordshire
- Yorkshire & the Humber
- That is a total of 180 face to face 'mystery shops' across the area based contractor network each month.
- Contractors should note that these figures may change to better reflect the size and density of different geographical areas. At this stage the figures provide a baseline to enable costings and comparison.
- This means that the successful contractor will need to have the capacity to deliver 540 face to face covert assessments between January 2019 and 31 March 2019.
- The contractor will be required to provide scanned copies of all skills action plans received by assessors (redacted when appropriate) following their interviews. Or able to supply a copy when requested by the Agency.
- The assessors will initiate the interviews by contacting the National Contact Centre or area based contractor and requesting a face to face interview with a National Careers Service adviser in their geographical area.

#### **Telephone assessments (from January 2019 to 31 March 2019)**

- From January 2019 until March 2019, the contractor will arrange a total of 20 covert assessor/mystery shop telephone information and advice sessions a month to each of the new 9 area based contractor regions. (That is 180 per month; 540 from January 2019 to March 2019)
- Five of the sessions will be with advisers attached to (lead) area based contractors and fifteen sessions will be with advisers attached to subcontractors (with telephone helpline resource).

- From January 2019 until March 2019:
- the contractor will deliver a total of 20 covert assessor/mystery shop information and support telephone interviews a month with National Careers Service staff via the National Careers Service's Newcastle based national helpline (for adult customers).
- the contractor will conduct a total of 20 webchat conversations with national careers helpline centre staff (adults) each month.
- the contractor will conduct a total of 20 assessor/mystery shop calls a month to the national careers helpline (young person's helpline – 13-18 years of age).
- the contractor will conduct a total of 20 webchat conversations per month to the national careers helpline (for young People).
- the contractor will conduct a total of 20 webchat conversations per month to the national careers helpline (for adults).

## **Reporting**

The contractor will produce a detailed qualitative narrative report and summary PowerPoint presentations with key statistics and headline findings to the Agency on a quarterly basis. The reports will consist of key statistics, themes, patterns and findings from each area based contractor region.

From time to time the Agency will require the contractor to produce free standing reports with a specific focus (e.g. adviser level responses informed by local or national initiatives or service priorities) It is unlikely that more than four of these reports would be required each year.

In May of each year of the contract the contractor will provide an annual summary report and a comprehensive (summative) report for each area based contractor region.

During the course of this contract the contractor will make the raw covert assessor data (e.g. csv files, etc.) available to the Agency on request. This will enable the Agency to make real-time comparisons and analysis with the other live research projects as well as the data that being is collated from the primes.

The contractor will need to ensure compliance with the General Data Protection Regulations and propose approaches that enable covert assessors to interact with the National Careers Service and be followed up without leaving permanent, genuine personal data on the National Careers Service's CRM systems.

## **Ongoing mystery shopping project**

The Agency will review the focus, frequency, methodology and content of the mystery shopping market research programme from time to time and on at least an annual basis.

The expectation is that the broad model of covert assessors engaging with advisers face to face, on the telephone or via webchat to assess the quality and consistency of specific aspects of the service is likely to continue unchanged for the life of the contract.

### **Key areas of focus**

The market research will focus on many aspects of the National Careers Service. There will be a strong focus on the quality of the interaction of the customer and these will be assessed through the five core skill areas for advisers. These are:

- Interviewing skills
- Use of labour market information
- Motivating and moving customers on
- Partnership working and referral activities
- Encouraging customer digital and self-serve skills

The themes of the mystery shopping project will support and be informed by a number of other National Careers Service priorities and research and evaluation projects including the Best Practice programme, the customer satisfaction and progression surveys and ongoing user research and product development activities.

Assessors will typically be trained to report back in an informed way on practical aspects of the service, including a selection of the following:

- Skills Action Plans – process and content
- The end to end customer experience process
- Use of web and tools (skills health check, job profiles, etc)
- Accounts
- ID assurance procedures
- Security of customer data (inclusive of GDPR)
- Appointment and booking process
- Waiting times
- Second appointment rationale
- Follow up arrangements
- Apprenticeships
- Brokerage activity (liaison with schools, colleges and employers, etc)
- Customer feedback opportunities
- Prime/subcontractor customer charter
- Literacy/numeracy skills check
- Motivational/inspirational behaviour
- Promotion of independent career management skills
- Reference to other National Careers Service channels

- Referral to other National Careers Service channels
- Adviser knowledge of Labour Market Information (LMI)
- Use of CRM and other databases – recording of personal details
- Adviser recognition of customer capability to self-serve and signposted appropriately to digital resources
- National Careers Service Helpline – provision of basic and full careers information, advice and guidance
- Focussed work on young people
- Focussed work on 50 and over customer group

Mystery shoppers/covert assessors would typically be expected to comment on 6 or 7 of the above aspects following a telephone call or face to face session with an adviser. The number and type of elements to be assessed will vary depending on the evaluation topic.

## **Project deliverables**

The appointed supplier will be required to complete the following prior to the fieldwork commencing:

- Creation of customer scenarios/scripts, etc
- Creation of roles/personas for assessors
- Creation of assessment/recording templates/scoring grids
- Moderation/validation process
- Training/briefing criteria for covert assessors about:
  1. ethical practice (e.g. disclosing identity/ use of adviser time when genuine customer has more urgent need, etc)
  2. assessing interviews;
  3. the National Careers Service offer and operational arrangements.
- An interim project report
- Production of quarterly, annual and thematic reports and presentations as required.
- A minimum of three face to face planning, presentation and/or review meetings with the Education and Skills Funding Agency in Coventry each year.
- Production of 9 annual comprehensive regional reports with key findings and recommendations.
- One annual summary report with key findings and recommendations.

## **Methodology Summary**

<b>Suggested Methodology</b>	<p>We propose a mixed methodology approach using quantitative and qualitative approaches. This will include:</p> <ul style="list-style-type: none"> <li>- assessment of adviser interview content and processes</li> </ul>
------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>(via face to face, telephone and webchat) by trained covert assessors</p> <p>- development of assessment and scoring criteria and templates</p> <p>- accessible data files to be available to the Agency, for separate analysis, on request throughout the life of the project.</p>
<p><b>Make up of research subjects:</b></p> <p>National Careers Service area based advisers and managers</p> <p>National Careers service helpline for adults and young people</p>	<p><b>Sample size:</b></p> <p>A minimum of 440 'mystery shops'/undeclared assessments each month.</p> <ul style="list-style-type: none"> <li>• 180 face to face ABC adviser interviews (adult persona)</li> <li>• 180 telephone ABC adviser interviews (adult persona)</li> <li>• 20 national career helpline telephone interviews (adult persona)</li> <li>• 20 national career helpline telephone interviews (young person persona)</li> <li>• 20 national career helpline webchat interviews (adult persona)</li> <li>• 20 national career helpline webchat interviews (young person persona)</li> </ul>
<b>Project completion date and extension details</b>	<p>31 March 2021 (subject to review each fiscal year)</p> <p><b>NB</b> The Agency reserves the option to extend the contract and retain the services of the successful contractor for a further two years i.e. 1+1 year extension subject to satisfactory performance by the contractor; the continuing availability of funding; and the continued commitment of the Education and Skills Funding Agency to the programme.</p>

## **Project Management Arrangements**

A Project Manager will be allocated for this project. Full details will be given following contract award.

## **Timescales**

Please confirm that you can meet our deliverables based on the timescales indicated with clear milestones. It is important to ensure that you are realistic with the timings as it will be assumed that your proposal will be based on timings that you would expect to work to for a project in this category.

<b>Activity</b>	<b>Date</b>
Tender Launch date:	September 13 2018
Last date for supplier queries	12.00 October 03
Last date to submit tender	12.00 October 05
Tender evaluation completed	November 2018
Successful organisation notified	November 2018
Contract handover (if required)	November/December 2018
Contract Start Date	January 2019

## **Deliverables**

In addition to the above project deliverables, we require the following:

- Project inception and scoping meeting - December 2018
- Project start date: January 2019
- Project initiation document (with detailed actions and timescales) - January 2019
- Production of research tools, including templates, topic guides, customer scenarios
- assessor roles/personas, etc
- assessor schedule and geographical distribution
- Monthly key data summaries. Progress reports, presentations and updates by phone or email as required.
- Availability to respond flexibly to (email and telephone) ad hoc queries within two working days, as required

The final report for this research / evaluation project must be formatted according to BIS/ESFA publication guidelines. The template will be provided



by the project manager.

Datasets to support those to be published in the final report must be provided in an accessible format (CVS, Excel) on submission of the report.

## **Special Terms**

There are no special terms for this Assignment.

## **To the Contractor:**

### **Project Completion date**

31 March 2021 (subject to review each fiscal year)

NB The Agency reserves the option to extend the contract and retain the services of the successful contractor for a further two years i.e. 1+1 year extension subject to satisfactory performance by the contractor; the continuing availability of funding; and the continued commitment of the Education and Skills Funding Agency to the programme.

## **Approach** (10 pages maximum)

### **Understanding environment**

Demonstrate your understanding of the project environment, detailing any experience and knowledge relevant to the project and policy/programme area, including any data sources or research relevant to the project.

### **Meeting objectives**

Outline what you would undertake to ensure the project objectives are met, highlighting key milestones and any value that can be added.

### **Methodology**

- Give a detailed description of the methods to be used in undertaking the project, indicating the resources that will be utilised, make it clear if you are suggesting a slightly different methodology to that suggested;
- Please include a recommendation for the size and composition of the sample and justification for your approach, along with any risks.

### **External Support needed**

- Note the support that would be needed and from whom, in order to undertake and complete this project

### **Dissemination**

- Provide details of how you would propose to work with DfE and the Education and Skills Funding Agency to disseminate emerging and final findings to stimulate policy debate.

### **Timings** (1 page maximum)

- Provide a detailed timetable for carrying out the work based on the proposed approach and method
- This should highlight key milestones and deadlines, including suggested meetings and progress reports.

### **Staff** (2 pages maximum)

- Provide a list of the staff that will be involved in the project at all levels from director, project manager and all other levels involved. The list should briefly highlight relevant experience, their role in the project; their estimated time to be spent on the project and the length of time they have spent working with your organisation
  - State the name of the project manager and a designated deputy

### **Finance** (2 pages maximum)

- Where appropriate provide a clear structure of charges for the different questionnaire length or sample structure options
- Please note that unless the specification details a budget for the project, one will not be provided.
- Give a detailed list of fees and expenses valid throughout 2019. The fees should include the cost of all required outputs as set out in this ITT.
- We anticipate making payments by either of the following methods:
  - Staged payments e.g. 30% (on confirmation of appointment), 30% on the beginning of fieldwork and 40% once the final report is completed.
  - Any additional expenses should be applied to the first available invoice; there is scope for flexibility here, please indicate any requests.
  - Payment in arrears for effort expended as per a pre-agreed payment schedule
- Note that fees should also include the time and travel costs for three project meetings with the Education and Skills Funding Agency project manager. Kindly state the costs per meeting if additional meetings are required during the life of the project.
- The costs must include a full breakdown, i.e. include day rates for each member of staff, fieldwork costs (including cost per interview), project management costs etc

### **Required statements** (1 page maximum)

- Note that details of your quality procedures for meeting the project requirements effectively must also be included
- Confirm that all employees (where appropriate, including agency staff working for your organisation) will at all times follow the MRS code of conduct and guidelines

If you have any questions relating to the requirements of the tender then please make use of the messaging service available on the Bravo portal in order to avoid delay. We will respond to your enquiry as quickly as possible during business hours. We reserve the right to tell other suppliers your question (anonymised) and our answer.

## Submission of Tenders

- Your tender must be submitted via the e-tendering portal at <https://education.bravosolution.co.uk> in Microsoft Word format (.doc) or Adobe Portable Document Format (.pdf). The maximum length should be 28,000 characters (including spaces and carriage returns) approx. 10 sides of A4 with a minimum font size of Arial 12.
- If you experience any technical difficulties with the portal then please contact the e-tendering help desk at [help@bravosolution.co.uk](mailto:help@bravosolution.co.uk).
- Queries relating to the specification or project should be submitted using the Bravo portal and not directly to the project manager.
- If you are unable to provide information in the form required then please contact us as soon as possible using the messaging service available on the Bravo portal.
- Full tenders must be received no later than **12.00pm on Friday 05 October 2018**.
- Late proposals will not be accepted.
- Your tender should be valid for sixty (60) days from the deadline for receipt of tenders.

## Tender Evaluation

Tenders will be evaluated using a weighted scoring approach with minimum required scores for each of the technical criteria and a minimum score across all technical criteria. Information from your tenders to become party to the Framework Agreement or from your Pre-qualification questionnaire responses may be taken into account in this evaluation. The criteria to be used and their weightings are given below.

<b>Understanding the Environment</b> Demonstrates understanding of the project environment, detailing experience and knowledge relevant to the project and policy/programme (10)	10
<b>Meeting the project objectives</b> Outline how the project objectives will be met, highlighting key milestones and any value that can be added (10) Presentation of proposal – succinct, well written, meets all requirements and objectives (5)	15
<b>Proposed Methodology</b>	25

<p>Inclusion of a detailed project plan (10)</p> <p>Proposal gives a detailed description of the methods to be used in undertaking the project, indicating the resources that will be utilised and making it clear where the different methodology is suggested and why (10)</p> <p>Proposal demonstrates a proven track record with examples of relevant and similar projects delivered over the past 3 years. (5)</p>	
<p><b>Staff and suitability of working arrangements</b></p> <p>Set out a resource plan identifying all staff and their intended involvement in the project (10)</p> <p>Outline qualifications, skills and experience of all staff involved including details of professional qualifications, membership of professional bodies and experience in similar projects over past 3 years. (7)</p> <p>Set out your customer liaison arrangements and procedures and ability to meet timescales (3)</p>	20
<p><b>Project Timescales</b></p> <p>Proposal includes detailed timetable for project, highlighting key milestones and deadlines, including suggested meetings and progress reports. (10)</p>	10
<p><b>Costs and value for money</b></p> <p>Inclusion of full cost breakdown including daily rates for each team member and individual activity cost associated with the specification and within expected price range.( (10)</p> <p>Provides examples of innovation in delivery methods to reduce costs and demonstrate value for money. (5)</p> <p>To include a cost estimate for any ad-hoc requests (5)</p>	20

Given the nature of this project the Agency may interview or require presentations from some or all tenderers before a contract is awarded. The Agency's decision on the selection of the contractor shall be final.

We expect to notify you of the outcome of the tender evaluation by **November 2018**.