

**Advice Skills Academy**

**Accredited Learning Tender Brief & Response**

Guidance and Tender document

Deadline for responses: 12 noon Friday 25 April 2018

**Part A: Guidance**

**1. Introduction**

We are seeking to procure a suitable provider or providers of accredited training at Level 3, for the Advice Skills Academy project, with up to a total value of £23,000. As part of the targets for delivery of the Advice Skills Academy project, we are looking to deliver a minimum of one unit of a Level 3 accredited qualification to up to 112 participants. The accredited training will be aimed at staff who wish to gain knowledge and an accredited (unit) qualification in an area connected with their role, or in an area where they would like to develop.

The Advice Skills Academy (ASA) is a European Social Fund (ESF) funded project, funded October 2016 to September 2019 (subject to change control approval), which will develop a co-ordinated approach to identifying learning and development needs of staff within the partner organisations in the Liverpool City Region (LCR). The project will: develop a calendar of training opportunities to meet the needs of staff, including internal Citizens Advice delivery, and externally procured delivery; identify other learning and development opportunities, including e-learning, coaching and mentoring; and support the development of learning organisations that are responsive to the needs of staff, volunteers, and their learning, development and progression goals.

The project has been developed to:

* Address higher level skills shortages in specialist advice services
* Provide training and support for people within the workforce to improve skills, knowledge, progression and productivity
* Provide a training and support route for disadvantaged groups seeking to access further job opportunities in the sector
* Improve management, leadership and progression capacity
* Promote equality by improving the progression prospects of women within the workforce

The participating partner organisations are:

Citizens Advice East Liverpool; Citizens Advice Halton; Citizens Advice Knowsley; Citizens Advice St Helens; Citizens Advice Sefton; Citizens Advice South Liverpool; and The Women’s Organisation.

The Women’s Organisation is the accountable body for this Programme. All correspondence in relation to this process will be with and through the Women’s Organisation.

**2. Procurement Process and Timetable**

This Tender is provided on the same basis to all Suppliers.

This Tender takes the form of a Single Stage Tender and all interested suppliers are invited to tender.

Tenders may be for one Lot, a combination of Lots, or all Lots in the brief.

Set out below is the proposed procurement timetable. This timetable is intended as a guide and, whilst The Women’s Organisation does not intend to depart from the timetable, it reserves the right to do so at any time.

|  |  |
| --- | --- |
| **Procurement Stage** | **Indicative Date** |
| Contract Notice published | 5 April 2018 |
| **Deadline for Tender Submissions**  (at The Women’s Organisation, Liverpool) | 12 noon  Friday 25 April 2018 |
| Contracts awarded and signed | Friday 18 May 2018 |
| Commencement | July 2018 |

No information contained in this Tender or in any communication made between The Women’s Organisation and any Supplier in connection with this Tender exercise, shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this Tender. The Women’s Organisation reserves the right to cancel the process at any time.

Under no circumstances shall The Women’s Organisation incur any liability in respect of this Tender or any supporting documentation. The Women’s Organisation will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their response to this Tender.

The Tenders are to be evaluated against the following pre-determined award criteria and the contract will be awarded on the basis of the most economically advantageous tender.

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| --- | --- |
| **Evaluation Factor** | **Weighting** |
| Price | 40% Price weighting |
| Quality | 60% Quality weighting |

**2.1 Procurement Queries and Submission of Tender**

The Women’s Organisation named point of contact for the procurement of this contract is Laura Anderson. All requests for further information in respect of the contract and the submission of completed tenders should be sent using the contact details below.

By e-mail to: [info@thewo.org.uk](mailto:info@thewo.org.uk)

Subject: FAO Laura Anderson, Advice Skills Academy Online Resources Bank Delivery Tender

By post to: Laura Anderson, The Women’s Organisation, 54 St James Street, Liverpool, L1 0AB.

Responsibility for ensuring that the tender is received by The Women’s Organisation lies with the applicant. Completed Tender documents may be submitted at any time before the closing date. Please note that completed Tenders received after the closing date may be rejected.

**3. Proposal Requirements**

The delivery of units of Level 3 accredited qualifications. The following areas are an indicative list of required unit / qualification details. Participant numbers may be subject to change. Delivery is expected to take place between July 2018 to June 2019.

**Lot a) Leadership**

Institute of Leadership and Management (ILM) Level 3 unit(s), or equivalent

* 8600-308 – Understanding leadership
* 8600-341 – Leading and motivating a team effectively

For up to 15 learners in 1 cohort, the ILM Leadership units detailed above (or equivalent units from another awarding body) to be delivered for learners to achieve a Level 3 Award in Leadership.

The accredited unit(s) should include face-to-face training delivery, as well as any assessment and verification required for the Award qualification.

**Lot b) Mentoring**

ILM Level 3 unit(s), or equivalent

* 8577-304 – Understanding good practice in workplace mentoring
* 8577-305 – Undertaking mentoring in the workplace
* 8577-307 – Reflecting on workplace mentoring skills

For up to 24 learners in 2 cohorts, the ILM units detailed above (or equivalent units from another awarding body) to be delivered for learners to achieve a Level 3 Award in Mentoring.

Assessment and verification only is required for the unit/qualification as Advice Skills Academy will arrange delivery of face-to-face training, and workplace mentoring practice. Assessment may be provided through face-to-face workshops with learners and/or through assessment of written assignments submitted by learners.

**Lot c) Project Management**

ILM Level 3 unit, or equivalent

8600-320 – Managing workplace projects

For up to 24 learners in 2 cohorts, the ILM unit detailed above (or equivalent unit from another awarding body) to be delivered for learners to achieve one unit qualification in Project Management.

Assessment and verification only is required for the unit qualification as Advice Skills Academy will arrange delivery of face-to-face training. Assessment may be provided through a face-to-face workshop with learners and/or through assessment of written assignments submitted by learners.

**Lot d) Developing yourself and others & understanding training and coaching in the workplace**

ILM Level 3 unit(s), or equivalent

* 8600-311 – Developing yourself and others
* 8600-317 – Understanding training and coaching in the workplace

For up to 12 learners in 1 cohort, the ILM units detailed above (or equivalent units from another awarding body) to be delivered for learners to achieve a Level 3 Award.

The accredited unit(s) should include face-to-face training delivery, as well as any assessment and verification required for the Award qualification.

**Lot e) Understanding stress management in the workplace & Understanding mental health in the workplace**

ILM Level 3 unit(s), or equivalent

* 8600-313 – Understanding stress management in the workplace
* 8600-343 – Understanding mental health in the workplace

For up to 12 learners in 1 cohort, the ILM units detailed above (or equivalent units from another awarding body) to be delivered for learners to achieve a Level 3 Award.

The accredited unit(s) should include face-to-face training delivery, as well as any assessment and verification required for the Award qualification.

**Lot f) Adults and Young People as Digital Literacy Learners**

City & Guilds 8375 Level 3 Certificate for Essential Skills Practitioners – Unit 311 Adults and Young People as Digital Literacy Learners – UAN: Y/506/9912

For up to 25 learners in 2 cohorts, the City & Guilds unit detailed above (or equivalent unit from another awarding body) to be delivered for learners to achieve a Level 3 unit qualification.

Assessment and verification only is required for the unit qualification as Advice Skills Academy will arrange delivery of training. Assessment may be provided through a face-to-face workshop with learners and/or through assessment of written assignments submitted by learners.

**Training sessions / workshops**

Where the qualification requires face-to-face training delivery, or an assessment workshop, ASA will undertake all practical administrative arrangements, including booking of venues, and initial administration of participant lists. The cost of venue hire and refreshments will be paid for by ASA. All training sessions will be delivered in a central location in Liverpool, to enable participants from across the Liverpool City Region to travel to sessions either by public transport or car. ASA will ensure that the chosen venue is accessible, and has suitable facilities including:

* Projector/screen
* Where possible - wi-fi access
* Flipchart
* Refreshments (N.B. lunches will not be supplied)
* Close proximity to lunch facilities
* Close proximity to parking and public transport facilities

**Delivery – other requirements**

As a European funded project, the Advice Skills Academy is required to comply with ESF requirements, including (but not limited to):

* The use of the official ESF logo on all internal and external documents;
* The notification (including verbally) to all participants attending activities that the project is supported by ESF;
* The collection of participants data, through attendance sheets, and monitoring and evaluation processes;
* Ensuring that disadvantaged groups, including people who are 50 and over, BME people, disabled people, and women can access and benefit from the project; and
* Receipt of copies of certificates from participants – for reporting to funders, the timely circulation of certificates to participants is necessary, to enable time to collect copies for our records and reporting to funders. Suppliers must be able to administer and facilitate the circulation of certificates in a reasonable timescale.

Due to the compliance requirements for ESF funding, the ASA project will expect that suppliers will comply with requirements to use the ASA project and ESF logos, and any other logos that require use due to funding arrangements (where the use of logos is appropriate, or where there is an absolute requirement, and ASA can advise on such), and suppliers will need to ensure that attendance sheets and monitoring and feedback forms are completed at sessions, and original copies returned to the project team.

**4. Selection, Award and Scoring**

**Selection Criteria**

Quality: What is your experience of delivering the contract brief, and what is your experience of specific subjects within it?

In particular, you may wish to consider:

* Describing your experience of delivery of accredited qualifications in the subject(s) you are tendering for, and at Level 3 specifically
* Indicating which Awarding Body / Bodies you are registered with, and would propose to use for the Lots you are tendering for
* Examples of feedback on contract delivery relating to some or all of the subject areas you are tendering for
* An outline of the relevant contract management and delivery staff and their relevant qualifications
* An indication of your administrative arrangements, especially in relation to facilitating the receipt of qualification certificates
* Information regarding if / how further unit study may be available to participants for those Lots that are single units
* How you have successfully developed training to engage with participants with differing levels of knowledge, different experience of undertaking qualifications, different learning styles, and different cultural backgrounds

**Award Criteria**

Most economically advantageous

Price 40%

Quality How would you deliver the brief? Added value? 60%

**Scoring**

Evaluation criteria will be based on a scoring of 0 – 10, the details of which are

|  |  |
| --- | --- |
| Score | Classification |
| 9-10 | Exceptional, Excellent response to the requirement good range of examples, highly relevant to the contract requirements |
| 7-8 | Above expectations, Good response to requirement and good range of examples provided |
| 5-6 | Meets expectations, Average response to requirement and reasonable range of examples provided |
| 3-4 | Below expectations, Poor response to requirement and few examples provided |
| 1-2 | Well below expectations, Poor response to requirement and no examples provided |
| 0 | Unacceptable, No response to the requirement was provided |

*Proposed Delivery:*

**1** Please provide details of your expertise and experience, including of previous contracts, relevant to this tender for each of the ‘Lots’ you are tendering for (10%)

You may wish to consider:

* Your experience of delivering accredited qualifications;
* Details of any awarding bodies you are registered with for the Lots you are tendering for;
* Your success rate for your learners completion of accredited qualifications / units.

**2.1** Please provide details of your methodology /approach to the task as described in the Brief, for each Lot you are tendering for (40%)

You should include:

* An indication of how many days of face-to-face training would be required (for those Lots that require training delivery), for each Lot you are tendering for.
* An indication of how you would facilitate assessment including Quality Assessment to provide the most cost effective delivery (e.g. in group settings, rather than individual 1-2-1 sessions)
* Where the Institute of Leadership and Management (ILM) units do not apply, as you will be delivering equivalent units from another awarding body, the specific qualification details, including qualification number, and unit title that you would intend to deliver to meet the brief, and a short explanation of why you have chosen to deliver that particular unit.

**2.2** Please describe your approach to diversity and cultural understanding in the delivery of this contract (10%)

You may wish to consider:

* How your material / session content reflects diversity, in the use of case studies, and scenarios
* The accessibility of your methods and learning materials in respect of age, gender, ethnicity, language, sexuality, disability, class and cultural background

**2.3** What is your readiness to commence delivery upon notification of a successful bid? (Not scored)

**3** Please state your price structure (and for each Lot you are tendering for) including:

* The cost for delivery of training sessions – per cohort (where applicable)
* The cost for assessment and Quality Assessment (IQA and EQA) – per cohort
* The costs for registration administration, and certification for learners – cost per learner
* An indication of which elements of delivery where VAT may be applicable
* Any other costs that may be included in your tender e.g. travel or accommodation costs for trainers or assessors

Score of 40%, with lowest cost scoring 40% and score reducing by pro-rata with price increase.

You may wish to consider:

* As a consortium of charities, partner organisations in the Advice Skills Academy are committed to reasonable pricing that represents value for money
* The Advice Skills Academy is funded through public funds, and must demonstrate accountability for expenditure

Worked example

*How Quality score will be used to give a weighted score*

* Technical Question 1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 6 | 10% | 1 | 6 |
| B | 8 | 10% | 1 | 8 |

* Technical Question 2.1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 7 | 40% | 4 | 28 |
| B | 7 | 40% | 4 | 28 |

* Technical Question 2.2

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 5 | 10% | 1 | 5 |
| B | 6 | 10% | 1 | 6 |

*How Price will be used to calculate a score*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 7 | 40% | 4 | 28 |
| B | 6 | 40% | 4 | 24 |

*Worked example of Overall Result*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Quality Score** | **Price Score** | **Total Score** | **Ranked Position** |
| A | 39 | 28 | 67 | 1 |
| B | 42 | 24 | 66 | 2 |

Threshold: Any applicant with an overall score of less than 65% will not be considered for contracting.

Ranking: Applicants will be ranked and offered contracts in ranked order (above threshold) based upon budget availability.

**Part B - Response to Tender**

**Section 1 Overview**

|  |  |  |
| --- | --- | --- |
| 1 | **Organisation / Consultant’s Details** | |
| **1.1** | Legal name of organisation |  |
| **1.2** | Trading name of organisation: (if different from the above) |  |
| **1.3** | Main function of organisation  (SIC code, if known) |  |
| **1.4** | Contact name: |  |
| **1.5** | Job Title: |  |
| **1.6** | Registered Legal Address: |  |
| **1.7** | Primary Correspondence Address (if different from above):  Post Code: |  |
| **1.8** | Telephone number: |  |
| **1.9** | E-mail address: |  |
| **1.10** | Website address (if any): |  |
| **1.11** | Company Registration number (if this applies): |  |
| **1.12** | Charities or Housing Association or other Registration number (if this applies). Please specify registering body: |  |
| **1.13** | Date of Registration: (if this applies) |  |
| **1.14** | Are you registered for VAT?  If “YES” please provide Registration number |  |
| **1.15** | Is your organisation: | (please indicate by ticking the appropriate box) |
|  | a public limited company? |  |
| a private limited company? |  |
| a company limited by guarantee |  |
| CIC |  |
| a limited liability partnership (LLP)? |  |
| Statutory Corporation? e.g. Further Education College |  |
| Sole Trader |  |
| Other (please specify the legal status of your organisation)? |  |
| **1.16** | Is your organisation part of a group of companies? If “YES” please give details below. |  |
| **1.17** | Name of (ultimate) parent company  (if this applies): |  |
| **1.18** | Companies House registration number of parent company (if this applies): |  |
|  | | |

**Section 2 – Due diligence**

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| --- | --- | --- | --- | --- |
| **2** | **Financial Information** | | | |
| 2.1 | Can you provide evidence of financial stability by submitting one of the following:  A copy of your accounts for the most recent **three** years  Or  An up to date set of management information (including turnover, profit & loss account and cash flow) covering the period from the last set of audited accounts to date or business startup. | |  | |
|  | |
| 2.2 | Has your organisation had any CCJs issued against it within the last 3 years? | |  | |
| 2.3 | Please indicate the size category of your organisation  Micro (1 – 9 employees)  Small (10 – 49 employees)  Medium (50 – 249 employees)  Large (250+ employees) | |  | |
|  | | | | |
| 3 | **Insurance** | | | |
| 3.1 | Please confirm the insurances (and indicate level) that you hold | | | |
|  | Employer’s Liability (required): |  | | |
|  | Professional Indemnity (required) : |  | | |
|  | Other (Specify): |  | | |
| 3.2 | Would you be able to increase level or type of insurances as required for this contract? |  | | |
|  | | | | |
| 4 | **Competencies** | | | |
| 4.1 | Does your organisation hold evidence of professional qualifications of its staff that it is prepared to submit for verification on request? | | |  |
| 4.2 | Does your organisation actively encourage CPD for staff and have an auditable record of staff development? | | |  |
|  | | | | |
| 5 | **Health and Safety** | | | |
| 5.1 | Does your organisation have a written health and safety policy that demonstrates your compliance with Health and Safety legislation? | | |  |
| 5.2 | When were your Health and Safety procedures last audited and / or reviewed and updated? | | |  |
| 5.3 | In the past 5 years has your organisation ever been prosecuted under health & safety legislation or been served prohibition or improvement notices by an Enforcing Authority such as the Health & Safety Executive?  If “YES” please provide evidence of the issues and how they have been resolved in practice to the satisfaction of H&S Executive | | |  |
| 5.4 | Do you have auditable systems in place to undertake and / or monitor risk assessments at employer locations | | |  |
| 5.5 | Does your health and safety policy make reference to and arrangements for participants / learners? | | |  |
| 5.6 | Please name and state the position of the person who will have responsibility for the health and safety of clients. | | |  |
|  | | | | |
| 6 | **Equality and Diversity** | | | |
| 6.1 | Do you collect and monitor equality and diversity data relating to your organisation and the services it provides, including that on ethnicity, gender and disability? | | |  |
| 6.2 | Where relevant, do you monitor participation and success rates of learners by ethnic origin, gender and disability? | | |  |
| 6.3 | Do you produce an action plan with targets based on the analysis of the equality data collected and review progress regularly? | | |  |
| 6.4 | In the last three years has any finding of unlawful discrimination been made against your organisation by any court or industrial or employment tribunal or equivalent body? | | |  |
| If “YES”, what steps did your organisation take as a result of that finding? | | | | |
| 6.5 | Do you undertake, in the delivery of services to actively promote good practice in terms of ensuring equality and eliminating discrimination in all forms through, as a minimum: | | | |
| a | The implementation of an organisational Equality and Diversity policy? | | |  |
| b | Providing relevant examples of the instructions, documents, recruitment advertisements or other literature with concern to the delivery of the contracted services when requested? | | |  |
| c | Issuing appropriate messages to participants / learners concerning recruitment onto provision and / or training progression? | | |  |
| 6.6 | Do you ensure that all staff in your organisation undertakes training so that they are aware of their responsibilities under your Equality & Diversity policy and the Equality Act 2010? | | |  |
|  | | | | |
| **7** | **Professional and Business Standing** | | | |
| 7.1 | Has your organisation ever been removed from a contract prior to its intended close date for failure to meet minimum levels of performance or for any other reason?  If you answer YES please give detailed explanation | | |  |
| 7.2 | Do any of the following apply to your organisation, or to (any of) the director(s) / partners / proprietor(s) or any other person with powers of representation? | | |  |
| i | A conviction (or convictions ) for a criminal offence related to business or professional conduct | | |  |
| ii | In a state of insolvency, voluntary administration, compulsory winding up, receivership, composition with creditors, company voluntary arrangements or subject to equivalent proceedings? | | |  |
| iii | Failure to fulfil obligations related to the payment of taxes | | |  |
| iv | Failure to fulfil obligations related to the payment of social security contributions? | | |  |
| v | Legal or administrative finding of commission of an act of grave misconduct in the course of business | | |  |
| vi | Failure to provide information required or providing inaccurate/misleading information when participating in a procurement exercise | | |  |
| vii | Failure to obtain and maintain relevant licences or membership of an appropriate trading or professional organisation where required by law | | |  |

**Section 3 – proposed delivery**

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| --- | --- |
| **Name of organisation:** |  |

|  |  |  |
| --- | --- | --- |
|  | **Please indicate which subject areas you are interested in tendering for delivery of (‘Lots’):** | ✓ |
| **Lot a** | Leadership |  |
| **Lot b** | Mentoring |  |
| **Lot c** | Project Management |  |
| **Lot d** | Developing yourself and others & Understanding training and coaching in the workplace |  |
| **Lot e** | Understanding stress management in the workplace & Understanding mental health in the workplace |  |
| **Lot f** | Adults and Young People as Digital Literacy Learners |  |

|  |  |
| --- | --- |
| **1 Please provide details of your expertise and experience, including of previous contracts, relevant to this tender for each of the ‘Lots’ you are tendering for. Score – 10%** | |
|  | |
| **2.1** **Please provide details of your methodology / approach to the task as described in the Brief. Score – 40%** | |
|  | |
| **2.2 Please describe your approach to diversity, gender and cultural understanding**  **specifically in the delivery of this contract. Score – 10%** | |
|  | |
| **2.3 What is your readiness to commence delivery upon notification of a successful**  **bid? (not scored)** | |
|  | |
| **3** | **Please state your price structure and terms. Score – 40%**  **Please include:**   * The cost for delivery of training sessions – per cohort (where training is applicable) * The cost for Assessment and Quality Assessment (IQA and EQA) – per cohort * The costs for registration administration, and certification for learners – cost per learner * An indication of which elements of delivery where VAT may be applicable * Any other costs that may be included in your tender e.g. travel or accommodation costs for trainers or assessors   Please note:   * All prices quoted shall be fixed and firm and shall apply for the full duration of the contract. * Following that period, any requests for price changes must be accompanied by a written summary and supported by evidence to justify the proposed price change. * No quantity or continuity of work is guaranteed to successful suppliers and this should be taken into account when completing the Pricing Schedule. * All prices quoted shall be exclusive of Value Added Tax (VAT), although for areas of delivery where VAT applies, this should be indicated in the description of your price structure * Any daily rate is for an 8 hour working day, during a normal working week (Monday to Friday). A half day is therefore considered as 4hrs. * All costs are deemed to include expenses and any other on-cost. |
|  |  |

Signed ………………………………………………………

Name (please print) ………………………………………..

Position in organisation ………………………………………………………..

Date: ……………………………………………….

Deadline for completed applications is: 12 noon, Friday 25 April 2018

Completed applications to be submitted to:

By e-mail to: [info@thewo.org.uk](mailto:info@thewo.org.uk)

Subject: FAO Laura Anderson, Advice Skills Academy Online Resources Bank Tender

By post to: Laura Anderson, The Women’s Organisation, 54 St James Street,

Liverpool, L1 0AB.