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Appendix B – Statement of Requirements

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1. PURPOSE

- 1.1 Engage established learning transformation experts, on a single tender basis during 2016-17 to work with the Home Office Learning and Skills (L&S) and Border Force (BF) People Capability teams to make recommendations as to how operational training can be delivered in a more effective and efficient way to maximise individual learning, and transfer skills to the workplace in order to support Border Force in achieving its aims.
- 1.2 This will enable delivery of the Home Office People Capability Strategy and realises the HR2020 transformation agenda reducing costs from £REDACTEDk to £REDACTEDk (28%) over the course of the Spending Review period.

2. BACKGROUND TO THE CONTRACTING AUTHORITY

- 2.1 Border Force is a professional law enforcement command within the Home Office. It is responsible for securing the UK border and controlling migration at maritime ports and airports across the UK and overseas.
- 2.1.1 Border Force strategic objectives are to:
- Deter and prevent individuals and goods that would harm the national interest from entering the UK
 - Facilitate the legitimate movement of individuals and trade to and from the UK
 - Protect and collect customs revenues from trade crossing the border
 - Provide excellent service to customers
 - Provide demonstrable effectiveness, efficiency and value for money
- 2.2 Border Force are working to develop and deliver their own Target Operating Model over the next 4 years to enable a greater level of organisational capability and adaptability and to realise their vision of being the best Border Force in the world. There will be a greater use of automation, a greater need to share intelligence and data across the wider system and continued pressure to improve border security. These changes will mean that there is a need for a more flexible and agile training model including the development and deployment of specialist skills, such as behavioural detection and child protection.
- 2.3 Border Force will also need a more robust response in the maritime border, to improve efficiency in the tackling of people and/or commodities smuggling.
- 2.4 Operational training delivery within Border Force is currently delivered through a mixed economy of operational trainers who work in L&S; trainers on detached duty from Border Force; Specialist Trainers working within Border Force and/or 3rd party specialist suppliers.
- 2.5 Learning and Skills is part of Home Office HR and supports the Home Office priorities which includes the delivery of operational training to Border Force, developing career

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pathways and skills linked to professions and aligned with the People Capability strategy and HO Skills Plan.

3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT

- 3.1 An effective and efficient delivery of operational training that maximises individual learning and transfer of skills to the workplace is needed for Border Force to achieve its aims.
- 3.2 The existing operational training offer has not been reviewed for some time and currently represents a significant resource constraint in terms of methods of delivery and timescales for staff to become fully operational. A significant proportion of the training is provided via 'classroom' style learning which is felt may not be the most effective delivery model.
- 3.3 The foundation for the current training offer is largely inherited from the two legacy organisations pre-merger. Whilst these provide good technical knowledge, they continue to reinforce a divide between customs and immigration functions and may not always provide a sufficiently robust law enforcement focus.
- 3.4 As an outcome from this review, Border Force will be seeking recommendations from the supplier on the content and delivery model for operational training that will meet its current and future needs.
- 3.5 There are a number of specific limitations in the current training model which this piece of work should address:
- 3.5.1 New operational delivery requirements are currently added to the delivery programme without a clear process of review of learning that is no longer required. In addition, it is felt there is no national co-ordination across the organisation with regions developing their own standalone training, which may not be to national standards
 - 3.5.2 Operational training is predominantly delivered in the classroom and is intensive which presents challenges in the time it takes for delegates to reach operational competence and thus onward deployment; leaves little additional time for personal, management or leadership development and is resource intensive and costly to administer and deliver.
 - 3.5.3 There are concerns that the operational training focuses too much on the legacy structure of Border Force, i.e., Immigration and Customs and not on the role of a multi-skilled Border Force Officer that is sufficiently versed in both disciplines.
 - 3.5.4 There are concerns that the best/most appropriate training options are not being used with the right mix of:
 - Context based scenario training;
 - On-the-job training with line manager/peer support;

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- Class-room based;
 - On-line training and new delivery mechanisms;
- 3.5.5 This has resulted in staff being less effective at embedding learning on the job than they should be and as a result, consistent cross-organisation performance management is made more difficult without clear and consistent skill level expectations.
- 3.5.6 Attempts to seek more cost effective and agile solutions e.g. e-learning have been met with deployment challenges e.g. IT infrastructure/operational time to complete; require frequent and regular updates suggesting it's not the most suitable delivery method; and don't deliver a scalable or sustainable model as requirements increase. There is also a challenge in securing the necessary skills and capabilities internally to design and develop innovative and creative content.
- 3.5.7 There are concerns that operational training does not sufficiently re-enforce the BF values and identity and that BF are not committing sufficient time to develop staff professionally and personally.
- 3.6 A separate review of the Home Office Target Operating Model (TOM) has recently taken place. This focused on the current L&D structures within the Home Office, including Border Force. The findings and recommendations from the TOM review will therefore impact on the BF Operational Training review and will be shared with the successful provider.
- 3.6.1 The TOM review was commissioned following an Operational Training Audit of the cross departmental L&D model in September 2015 that highlighted a number of recommendations, which need to be addressed and implemented:
- 3.6.1.1 The efficiency and effectiveness of the current learning and skills delivery model, which is part centralised and part decentralised, should be formally assessed.
 - 3.6.1.2 Determine a set of overarching strategy principles for operational training within the Department and agree how these may be deployed to improve consistently/quality of delivery, efficiency and Value for Money (VFM).
 - 3.6.1.3 Produce an overarching cross departmental budget and spend position in respect of learning and development activity and implement a consistent and comparable reporting format.
 - 3.6.1.4 Review the content, collation and reporting of Learning Management Information (MI) across the department to ensure that information needs can be effectively and efficiently met and that there is appropriate assurance over data accuracy.



- 3.6.1.5 Clarify, in light of the overarching strategy, the roles and responsibilities for learning within the Home Office. These should be clearly articulated and communicated and lines of engagement between stakeholders should be formalised in order that accountability is clear.

4. DEFINITIONS

Expression or Acronym	Definition
L&S	Means Learning and Skills
TOM	Means Target Operating Model
L&D	Means Learning and Development
BF	Means Border Force

5. SCOPE OF REQUIREMENT

- 5.1 The most critical part of the process is in understanding the business requirement; examining the effectiveness of the current Border Force Operational Training L&D model and making recommendations for a future solution.
- 5.2 The supplier will need to demonstrate their method on how they will provide implementation plans and recommendations that are cost effective and in line with current departmental spending.
- 5.3 The Supplier will identify the Project Team, internal stakeholders and workshop participants and will gather information by conducting 1:1 interviews and facilitating group workshops.
- 5.4 The Supplier must provide their method for reporting and how the reports will be submitted, this should include a weekly update process as a minimum. This also includes submission of a project plan.
- 5.5 The Supplier will engage senior business leads in Border Force at interview or workshop and analyse the data to make their recommendations. They will be working alongside the L&S/BF People Capability who will also be working with the business to gather data on existing provision and future requirements.
- 5.6 The depth and breadth of the conversations will determine the timescale and will allow L&S/Border Force to determine an optimum future focussed solution. Whilst the scope, analysis and recommendations will remain relatively static, the data collection phase is variable based on the number of interviews and workshops carried out.
- 5.7 The Supplier will have had previous experience working on reviews of this kind and will use tools to look at the current work of the cross organisation L&D teams. Data will be collated through a combination of obtaining information from workshops and interviews and also getting business areas to complete a spreadsheet. Information will be stored by the HO.



- 5.8 The supplier will be tasked to assess the existing BF Operational Training with a clear focus on Border Force’s strategic objectives (see 2.1) -. The “as is” study should be mapped against the following context:
- 5.8.1 The current operational training offer
 - 5.8.2 People structure
 - 5.8.3 Policy and governance
 - 5.8.4 Data and technology
 - 5.8.5 Role and training profiles
 - 5.8.6 What is the L&D strategy?
 - 5.8.7 How does the business deliver learning?
 - 5.8.8 What is the cost?
 - 5.8.9 How do the business and L&S evaluate impact of learning?
 - 5.8.10 How should the future model ensure that the skills and training levels of staff are current and equip them to address emerging threats?
 - 5.8.11 What MI should be produced and how are training and skills currently recorded?
 - 5.8.12 How should Border Force ensure consistency across business commands?
 - 5.8.13 Identify learning gaps to address future requirements
 - 5.8.14 What are the strategic risks?
 - 5.8.15 Identify commonalities across commands and recommend how to capitalise on these and eradicate duplication.
 - 5.8.16 How will the business ensure that staff remain occupationally and operationally current and competent.
- 5.9 The supplier must engage with key stakeholders and secure buy in to establish justification for future requirements and to determine:
- 5.9.1 Organisational context requirements and future challenges:



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- 5.9.1.1 The experience of current ‘as is’ service provision
- 5.9.1.2 What works well?
- 5.9.1.3 What could be improved?
- 5.9.1.4 What success would look like for this project?
- 5.10 The supplier’s review must cover the following:
- 5.10.1
- Phase one Information gathering and analysis
 - Phase two Developing alternative approaches
 - Phase three Testing options
 - Phase four Finalising options and reporting
- 5.10.2 How to improve provision of operational skills in the short, medium and long term. Explore options and solutions around a fit for now and a fit for future L&D operating model.
- 5.10.3 Review the needs/future challenges of the organisation and include the Supplier’s experience of successful models within and without the public sector.
- 5.10.4 What are the activities and processes required in line with the organisation’s strategy, purpose, value proposition and customer needs
- 5.10.5 What is required around:
- 5.10.5.1 The L&D service delivery and structure, including third party suppliers and the location of service delivery (both physically and virtually).
- 5.10.5.2 Policy and governance – the framework of policies, governance, internal controls and risk management, including how the L&D function itself is managed, how decisions are made and which delegations of authority are in place.
- 5.10.5.3 Technology to facilitate sharing, intelligent analysis and integration of people data and accurate reporting.
- 5.11 The Supplier will produce recommendations and implementation plans for discussion which suits Border Force and links to the People Capability Deliverables and the current transformation objectives - estimated timescales are up to 3 months for the full review (see section 6). A draft report will need to be submitted and shared for comments and discussions with the project team. A final report will then need to be submitted, taking into consideration the comments and this will be issued at the end of the project. The report should include but not be limited to the following:



- 5.11.1 Strategy, purpose and value proposition
- 5.11.2 Future state recommendations
- 5.11.3 Options for a future L&D model including a recommended option
- 5.11.4 Activities and processes and indicative roles
- 5.11.5 People, Structure and Location
- 5.11.6 A high level implementation plan
- 5.11.7 Policy and governance
- 5.11.8 Data and technology

6. KEY MILESTONES

- 6.1 The Key Milestones will be expected to completed by 28th April 2017.
- 6.2 The Potential Supplier should note the following project milestones that the Authority will measure the quality of delivery against:

Milestone	Description	Timeframe
1	Project scoping – identification of project team, internal stakeholders and workshop participants; agreement of data gathering template; interview/workshop protocols	By mid February 2017
2	Information gathering; conduct 1-1 interviews and facilitate group discussions	Mid February to mid March 2017
3	Data analysis and benchmarking – review of data and feedback; creation of initial recommendations	Mid March to late -March 2017
4	Reporting – review of initial recommendations with project team; finalise and submit report to project team	^L By 28th April 2017

7. AUTHORITY'S RESPONSIBILITIES

- 7.1 The authority will ensure that the information is readily available to the Supplier to enable successful delivery of the contract.

8. REPORTING

- 8.1 End of project report will include recommendations and implementation plans for the future provision of operational training.

9. VOLUMES

- 9.1 Not Applicable



10. CONTINUOUS IMPROVEMENT

- 10.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 10.2 The Supplier should present new ways of working to the Authority during weekly Contract review meetings.
- 10.3 Changes to the way in which the Services are to be delivered must be brought to the Authority’s attention and agreed prior to any changes being implemented.

11. SUSTAINABILITY

- 11.1 Not Applicable

12. QUALITY

- 12.1 The milestones and KPIs are to be achieved within the timescales as specified in Section 15.

13. PRICE

- 13.1 Capped Price to be set out per phase:
- 13.2 Scoping, data collection; analysis; recommendations and reporting.
- 13.3 Prices are to be submitted via the e-Sourcing Suite (Appendix E- Pricing Schedule) excluding VAT.
- 13.4 The budget allocated to this requirement is a maximum of £85,000.00 (exc.VAT). As part of the contracting process we will seek to secure substantial reductions in the supplier’s rates for this engagement and will not expect to pay for Partner time or internal supplier peer reviews.

14. STAFF AND CUSTOMER SERVICE

- 14.1 The Authority requires the Potential Supplier to provide a sufficient level of resource throughout the duration of the Provision of Consultancy Services to Support the review of Border Force operational training.
- 14.2 Potential Supplier’s staff assigned to the review of Border Force operational training shall have the relevant qualifications and experience to deliver the Contract.
- 14.3 The Potential Supplier shall ensure that staff understand the Authority’s vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

15. SERVICE LEVELS AND PERFORMANCE

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

KPI/SLA	Service Area	KPI/SLA description	Target
#1	Project scoping	For the Identification of project team, internal stakeholders and workshop participants to be agreed. An agreement of a data gathering template; and also	100



		interview/workshop protocols to be agreed.	
#2	Information gathering	26 days to conduct 1-1 interviews and facilitate group discussions	100
#3	Data analysis and benchmarking	Review of data and feedback; creation of initial recommendations	100
#4	Reporting	Review of initial recommendations with project team; finalise and submit report to project team	100

16. SECURITY REQUIREMENTS

16.1 Not Applicable

17. INTELLECTUAL PROPERTY RIGHTS (IPR)

17.1 Section 9 of the CCS Terms and Conditions shall apply.

18. PAYMENT

18.1 Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.

18.2 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

19. ADDITIONAL INFORMATION

19.1 Not Applicable.

20. LOCATION

20.1 The base location of the Services will be carried out at supplier headquarters in Manchester but HO T&S policy will apply to travel to any Home Office location as and when required.



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