

School Trust CEO Programme Executive Coaching

Invitation to Tender

Thank you for your interest in bidding to be a provider of executive coaching as part of the National Institute of Teaching's School Trust CEO Programme.

In this bid pack, you will find the information you need to complete your bid. The answer template that you should use when writing your bid and a draft contract can be found separately on the NIOT's website.

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Submission

The deadline for submission will be **12pm Friday 22nd December**. Submissions should be sent to schooltrustceo@niot.org.uk.

Clarification questions and webinar

Bidders may submit clarification questions during the tender process. Questions will be responded to via a webinar, which will be recorded and made available afterwards.

- Deadline for bidders to submit any clarification questions in writing – **6pm Tuesday 11th December**. Clarification questions should be sent to schooltrustceo@niot.org.uk.
- Webinar for contractor to respond to clarifying questions – **11am Thursday 14th December**. The webinar will be hosted on zoom, to be send an invitation please use the website to express interest or email schooltrustceo@niot.org.uk.

Section 1 Background

1.1 The National Institute of Teaching

The National Institute of Teaching (NIoT) was founded by four of England's leading School Trusts. The NIoT's vision is to transform the lives of pupils by nurturing the talents of teachers and leaders. Our mission is to improve the quality of teacher and leader development at a system level through generating research, applying the insights to the design and delivery of our programmes, and sharing findings with the sector.

1.2 School Trust CEO Programme

Half of the pupils in England (54%) are educated in a trust. The DfE has identified that "the best trusts are successful in large part because of the leadership and systems which the most effective Chief Executive Officers bring to their trusts, supported by effective oversight from trust boards (including chairs) and excellent central teams."

The CEO role is vital in both leading and shaping the education system. It is complex, demanding, highly influential, and nuanced. It is community-shaped and community-shaping, as well as subject to national and international influences. It is also relatively new in comparison to other roles in the sector.

With this challenge in mind, we have created a programme for new and current CEOs to enable them to thrive in this rewarding and vital role. Our approach reflects the complexity of the role; the local, the national, the internal focus on standards, and the external focus on the role schools play in the lives of their children, families, and neighbourhoods.

The programme aims to:

- build the next generation of CEOs and system architects;
- provide the knowledge, insight and practice to ensure CEOs can run successful, sustainable, thriving trusts that develop as anchor institutions in their communities;
- build a powerful network that colleagues can utilise in the future for the benefit of their own trusts and in shaping the system;
- nurture the talents of the most senior leaders in our system to lead and grow trusts especially in areas where they are needed most;
- provide confidence to the system that growth of the trust system will be successful due to a strong, diverse pipeline of CEOs nationally.

Through the programme participants will develop the knowledge, skills and behaviours required to lead larger School Trusts as set out in the [Department for Education's CEO content framework](#). Participants will be supported to do this through a blend of self-study, immersion experiences, live conferences, and personalised coaching. Online, self-study will allow participants to work through the core knowledge in the framework flexibly around their other commitments. In-person conferences will bring participants together to further focus on the most complex issues linked to self-study. Immersion experiences will give participants the opportunity to observe and learn from best practice in other trusts. Coaching will ensure participants receive tailored support and guidance suited to their differing starting points.

The programme is designed for aspiring and experienced leaders of small-medium sized School Trusts who are seeking to grow their trust or move to a larger trust and have a commitment to becoming an architect of the school system, supporting the system from within and beyond their own trust. It is funded by the DfE and delivered at no cost to participants.

1.3 CEO Coaching

Each participant on the School Trust CEO Programme will be assigned an executive coach to support them through the programme and assist them to assimilate the knowledge and experiences gained through their participation so that they can apply them to their own context.

One to one coaching will ensure participants receive support and guidance suited to their needs. It will also explore participants' authentic principles and vision for pupils and communities: securing and testing them, communicating them, and reflecting on this process.

Section 2 Scope of Work

2.1 Description of services

The NIOT are looking appoint a provider to deliver the coaching element of the School Trust CEO Programme. The contract will be for two years from March 2024 to February 2026. The appointed provider shall provide highly experienced executive coaches with experience of coaching people working in education and experience coaching CEO or C-suite leaders. Coaches will be accredited by a reputable coaching organisation and drawn from a diverse range of backgrounds.

2.2 Objectives of coaching

One to one coaching will ensure participants receive support and guidance suited to their differing starting points. It will enable participants to:

- work through learning from other elements of the programme, applying it to their own context;
- grapple with key actions and skills they need to develop;
- work through the next step in their careers;
- support their ability to lead complex organisations authentically and sustainably for pupils staff and communities

In each session, participants will be encouraged to bring a scenario from their own context relating to the knowledge they have gained from the programme framework. This personalised approach will help participants in applying the framework elements in their day-to-day responsibilities effectively. Coaching post-programme will also focus on next steps for their trust and/or for their professional journey including the potential to take up a new CEO position in a different trust serving an area of disadvantage, grow their current trust, or, for participants who are not yet CEOs, to move into a CEO role.

2.3 Format of coaching

Participants will receive a total of 9, hour-long coaching sessions. The first cohort of 25 participants will begin the programme in February 2024 and receive 6 sessions of coaching until February 2025. They will then receive 3 coaching sessions up to May 2025. The second cohort of 50 participants will begin the programme in September 2024 and will receive 6 sessions of coaching until September 2025. They will then receive 3 coaching sessions up to January 2026.

Coaches and participants will schedule sessions at mutually convenient times. The dates above indicate the dates by which coaching sessions must have taken place. Sessions should be scheduled at least two weeks in advance. If a participant cancels a session with less than 48 hours' notice, the coach will not be expected to rearrange that session and the participant will not receive that hour of coaching. It will be the responsibility of the appointed provider to monitor session completion and to provide monthly engagement reports to the NIoT.

Coaching sessions will take place online, using a platform as agreed between coach and participant.

The appointed provider will be responsible for matching coaches and participants. The NIoT will provide a list of participants including information to support matching. Based on experience of running senior level coaching in other education settings, the Contractor expects that the vast majority of participants will be able to work effectively with a highly skilled coach who understands their role.

2.4 Lessons learned sessions

Alongside the delivery of coaching, the appointed provider will facilitate three lessons learned sessions with coaches, once at the mid-point of contract delivery, and once at the end. The purpose of these sessions is to anonymously identify common themes and challenges faced by participants. The provider will summarise findings from these sessions into a report for the NIoT to inform future design and development of the School Trust CEO Programme.

Section 3 Technical Requirements

There are two elements to the service being procured:

- a. Coaching provision.
- b. Lessons learned insight activities.

3.1 Coaching provision

- a. The provider shall provide coaching support to participants on the School Trust CEO Programme.
- b. There is no prescribed coaching methodology or approach which the provider needs to follow. It will be up to the provider to propose a methodology or approach which they think is most relevant and suitable for the participants and the programme and is built from an evidence-informed approach.

- c. The coaching should build upon the content of the programme and the insights of the coachee to inform their future success, and where recommending further reading, this should be based on secure evidence.
- d. The Provider will be required to attend a briefing session on Programme content with the Contractor.
- e. The provider will be required to meet termly with the Contractor to monitor the contract.
- f. Neither the provider nor individual coaches should actively promote further coaching business from participants on the programme as direct clients or commissioners of coaching services.

3.2 Session structure

- a. The coaching sessions will utilise a structured discussion format to ensure focused and productive dialogue. This structure aids the participant in crystallising the challenges they are grappling with, linking them to the framework, exploring the underlying causes, and identifying potential solutions.
- b. At the conclusion of each session, the executive coach will guide the participant through an action-planning phase, ensuring the participant details the steps that will be taken to address the identified challenges or apply the new knowledge. These action steps will be revisited in subsequent coaching sessions, allowing for iterative reflection and adaptation. It will also mean that areas discussed become embedded in practice.
- c. The executive coach will first liaise with the participant to gather the specific problem they wish to tackle in the upcoming session. Obtaining this information in advance will allow the coach to prepare thought-provoking and relevant questions. Based on the problem provided by the participant, the coach should determine which stage(s) of the coaching structure will be the focus for the session. This approach is drawn from the Education Endowment Foundation's Implementation Guidance. These stages could include:
 - d. The Explore Phase: If the problem requires a deeper understanding or more information.
 - e. The Prepare Phase: If the participant seems ready for change but hasn't yet formulated a plan.
 - f. The Planning Phase: If the participant has a clear strategy and is ready to move to action.
 - g. While the coach's primary role is to facilitate the participant's own problem-solving and decision-making, being prepared with additional reading or evidence-based solutions can add value to the session. This preparation enables the coach to offer deeper insights and alternative perspectives should the participant need them.
 - h. While preparation is essential, the priority for the coach is to remain responsive to the ideas, thoughts, and solutions proposed by the participant. Coaches should be prepared but not prescriptive, focusing on enabling the participant to find their own solutions within an evidence-based framework.
 - i. The **coaches** will be:

- i. Highly experienced executive coaches, with some experience of coaching people working in education (ideally in a school context), **and** experience of coaching CEO or C-suite leaders.
- ii. Accredited by a reputable coaching organisation, (e.g. Association for Coaching (AC), European Mentoring and Coaching Council (EMCC) and International Coach Federation (ICF)).
- iii. Drawn from a diverse range of backgrounds.
- j. The **coaching format** will be as follows:
 - i. 1-2-1 sessions
 - ii. 1 hour duration
 - iii. Online, using whatever platform coaches and coachees agree.
- k. **Coaching delivery.** The first cohort of 25 participants will begin the programme in February 2024 and receive 6 sessions of coaching until **February 2025**. They will then receive 3 coaching sessions up to May 2025. The second cohort of 50 participants will begin the programme in **September** 2024 and will receive 6 sessions of coaching until September 2025. They will then receive 3 coaching sessions up to January 2026.
- l. The programme schedule for cohort one is summarised in the table below.

Month	Programme Element	Theme
Feb	Induction	Welcome
Feb - Mar	Self-Studies 1 - 6	Module 1: Trust Culture and the Strategic Operating model
March	Conference 1	Foundations: Vision, Community & Systemic Impact
April	Coaching 1	
April	Immersion 1	Operating Models for System Improvement
May	Coaching 2	
May - Jun	Self-Studies 7-9	Module 2: People
June	Conference 2	Strategic Governance
May - Jun	Self-Studies 10 - 12	Module 3: Strategic Governance
July	Immersion 2	Effective Communication
July	Coaching 3	
Sept	Self-Studies 13-14	Module 4: Finance & Operations
Sept	Coaching 4	
Oct	Self-Studies 15 - 16	Module 5: Quality of Education
Oct	Conference 3	Developing People: Learning from beyond the UK
Nov	Coaching 5	
Nov - Dec	Self-Studies 17 - 18	Module 6: Public Benefit & Civic Duty
Jan	Immersion 3	Education and Standards
Jan	Coaching 6	
Feb	Conference 4	Legacy & Leadership: Celebration of achievements & future horizons
Feb-May	Coaching 7-9	

- m. The additional follow-up coaching sessions will focus on the participant's ongoing personal development and their leadership journey, whether within their current trust or as they transition to a new role.

3.3 Matching process

- a. The matching process will need to be completed between the point of contract signature and 4th March when the first coaching sessions take place.
- b. NIOT will provide a list of participants for the provider. This list will include any relevant characteristics of participants and how this might affect matching to coaches (e.g. particular experience of coaching in a primary school setting).
- c. The coaching provider will make an initial match of participants to coaches, including conducting a conflict of interest check, and a match of relevant experience where relevant which can be discussed
- d. Participants and coaches will hold their initial meeting by the end of March Having a good rapport with a coach is an important factor for coaching effectiveness. Based on experience of running senior level coaching in other education settings, the Contractor expects that the vast majority of participants will be able to work effectively with a highly skilled coach who understands their role
- e. Participants will not be actively asked if they would like to change their coach.
- f. However, if, at the end of the first session, the participant does not feel they can work effectively with the provided coach for whatever reason, and approaches the contractor the provider will seek feedback from the participant and arrange for them to meet with another coach.
- g. If, after this meeting with a second coach, the participant does not feel they can work effectively with them, the provider will seek feedback again and arrange for a meeting with a third coach.
- h. If the participant does not feel they can work with the third coach, they will no longer be eligible for coaching.

3.4 Coaching supervision and Management

- a. Coaches should receive some form of ongoing supervision by the Provider for the duration of the period they are providing coaching on the Programme.
- b. Throughout the Programme, the contractor will solicit feedback from participants. If, at any stage, a participant highlights a significant concern with a coach, the contractor will raise this with the provider within 2 working days, and, depending on the severity of the concern may ask for the coach to be replaced immediately, or for the provider to undertake other remedial action as necessary, providing a clear and timebound action plan within 5 working days.
- c. In the event of a coach being removed from the programme, or ceasing working for the provider for whatever reason, it will be the responsibility of the provider to find a suitably qualified replacement coach in their place and to re-match them with participant(s) as necessary per the process outlined.

- d. If a coach is ill and therefore unable to attend a session, they should notify the participant in advance, and look to rearrange the session as soon as practicable once they are well again, usually within one week of returning to health.
- e. If a coach becomes long-term sick and is unable to provide coaching, it will be the responsibility of the provider to source an appropriately trained and qualified coach (per their usual processes) to replace them.

3.5 Lessons learned insights sessions

- a. The discussions participants have with coaches will provide many insights into the challenges faced by participants and where they may need additional support. The contractor would like to draw insights from the coaching sessions to help inform continuous development of programme design and delivery.
- b. Therefore, the contractor is procuring the provider to run three feedback/ reflection sessions as follows:
 - i. August/ September 2024– the mid-point of delivery for cohort one,
 - ii. February 2025 – end point for cohort one 'on programme',
 - iii. May/ June 2025 – after the post-programme coaching sessions have concluded for cohort one.
- c. These sessions should identify common themes, challenges faced, and any information about strategies which participants have effectively put into practice. Participant confidentiality will be maintained and no information will be shared which could be identified as having originated from a particular participant.
- d. An interim report summarising the themes will be shared with the Contractor by February 2025, and a final report will be shared by June 2025.
- e. These reports are not envisaged to be a lengthy document; quality is more important than quantity. A document of c.1,000 words of high quality insight is what is required.
- f. The contractor will be required to assist with any evaluation (internal or external) commissioned by the contractor, e.g. providing anonymised data on coaches, being available as an interview respondent.

Section 4 Submission requirements

Part A:

Pre-Qualification Questions

Bidders should provide the following documents as part of their submission:

- Last set of audited accounts
- Their organisation's version of the following policies:
 - o Complaints
 - o Confidentiality and data protection
 - o Safeguarding

Part B:

Bidders should provide responses to the questions below, taking note of the number of marks awarded per response and not exceeding the word limits for responses.

As part of the response, please tell us the number of coaches that you anticipate using. There is a specific section for this in the answer template. Our expectation is that the average ratio is between 3 and 7 participants per coach. If your ratio is outside this range, use the appropriate question (3b) in the technical response to explain why yours would be different and how you would satisfactorily manage this.

Question	Word count	Max scoring for question	Weighting	Total marks available
Question 1: Coaching vision and education experience				
1 a) What is your approach to coaching?	1,000 words in total for question 1	4	1	4
1 b) What experience do you have coaching: i) C-suite leaders and ii) senior leaders in education?		4	1.5	6
1 c) How would you ensure coaching contributes to the effective development of participants on the programme?		4	1	4
Question 2: High quality delivery				
2 a) How would you select coaches to deliver this contract?	1,000 words in total for question 2	4	1.5	6
2 b) How would you quality assure coaching provision and ensure that coaches follow ethical guidelines in their practice?		4	1.5	6
2 c) How would you ensure we learn lessons from coaching to inform future programme development and delivery?		4	0.5	2
Question 3: Programme management				
3 a) What relevant experience do you have of running a similar scale programme of coaching alongside other leadership content?	1,000 words in total for question 3	4	1.5	6
3 b) How will you ensure you have enough coaches to meet the requirements of the brief?		4	1.5	6
3 c) What do you consider to be the main risks of delivering this contract, and how would you mitigate them?		4	1	4

The total score for part B will be multiplied by 1.82 to give a score out of 80. This will be added to the bidder's score out of a possible 20 for costs to give an overall total out of 100. (The scoring process for cost is included in section 6 on Budget and payment mechanism.)

Question 4:

Please provide an outline of the tenderer's price including overall cost, including VAT, the hourly coaching rate and the proportion of the overall cost which is management overheads and setup costs.

Marking criteria

Score	Explanation
4 - Exceeds requirement	The response provides a full explanation of how the bidder would meet the requirement and demonstrates additional value or quality above the tender requirements
3 - Fully meets requirement	The response provides a full explanation of how the bidder would meet the requirement
2 - Partially meets requirement	The response gives some explanation of how the bidder would meet the requirement, but with omissions
1 - Doesn't meet requirement	The response does not adequately explain how the bidder would meet the requirement

The contractor reserves the right to exclude any bid which scores 1 on any question or sub-question.

Section 5 Budget and pricing structure

5.1 Budget overview

- The maximum value of this contract is £250,000 + VAT.
- All prices submitted must be inclusive of VAT.
- Tenderers will submit their hourly coaching rate (to be multiplied by 675 hours of coaching) and a single cost for management overheads and set-up costs.
- A maximum of 15% of the Tenderer's overall price may be allocated for management overheads and set-up costs.

5.2 Scoring

- The total price submitted will be used to generate the Tenderer's 'Tendered Price' which will be used for the purpose of the Price Evaluation. The 'Tendered Price' is the total of:
 - The full set up costs
 - The full cost of delivering all possible coaching sessions (Tenderer's hourly coaching rate x 675 hours)
- The Tenderer who offers the lowest Tendered Price will achieve 100% of the Maximum Price Score available, namely 20% of the Total Tender Score.
- Every other Tenderer will be ranked on a relative assessment basis from lowest to highest and awarded a percentage of the maximum Price Score available on a reducing basis, based on the Tenderer's Tendered Price versus the lowest Tendered Price. The process is illustrated in the example below:
- The calculation used is:
 - Score = (Lowest Tendered Price ÷ Tendered Price) x Maximum Score available (20)
 - Scores will be rounded to two decimal places.

A worked example is provided below:

Tenderer A TP = £225,000

Tenderer B TP = £250,000

Total marks available for Price = 20

Tenderer A has the lowest Tendered Price and so scores the full 20

Tenderer B's £250,000 price score is calculated to be:

$(225,000/250,000) \times 20 = 18$ (90% of the available 20 marks)

5.3 Abnormally Low Tenders

- a. Where obvious arithmetical errors are found in a Tenderer's cost schedule, the NIoT may, at its discretion, contact the Tenderer immediately, asking for clarification and stating the time period the Tenderer has to respond. In this case, the Tenderer will be asked to correct the error or withdraw their Tender. Failure to comply with the rectification or stipulated time period will deem the Tender non-compliant and the Tender shall be excluded from further participation in this Procurement.
- b. The NIoT reserves the right to seek independent financial and market advice to validate the information declared to assist with the evaluation.
- c. The NIoT reserves the right to disqualify any Tender which it considers to be priced at abnormally low levels. An abnormally low price is considered to be one which:
 - i. appears much lower by comparison to the prices of other Tenders or the NIoT's 'should cost' estimate;
 - ii. is unlikely to cover the Tenderer's costs, even with efficient working; or
 - iii. seriously calls into question the Tenderer's understanding of the requirement or ability to perform the Contract satisfactorily.
- d. If the NIoT deems that a Tenderer has submitted a price, or part of a price, that is abnormally low, the NIoT may, at its discretion, investigate the price and write to the Tenderer to request an explanation of, and information pertaining to, the offer, or those parts of the offer, which the NIoT believes is abnormally low.
- e. Upon receipt of the information, the NIoT shall assess and fully consider the information and evidence provided by the Tenderer to verify if the offer, or those parts of the offer, is valid, or should be classified as abnormally low.

5.4 Payment mechanism

- a. Monthly payments will be made to the appointed provider in arrears based on the following formula:
 - i. coaching hours delivered in last month x hourly rate, plus
 - ii. management overhead allocation (total management overhead cost/ number of months contract duration)
- b. Apart from the exception outlined in 5.1, sessions will only be paid for where delivery takes place.
- c. NIoT staff will check invoiced delivery against actuals before approving monthly payments.

5.5 Cancelled sessions

- a. The Provider will still be paid if a participant cancels an arranged session less than 48 hours in advance. If a participant misses two sessions, the NIoT programme team will pick this up with the participant to discuss their ongoing engagement.
- b. If the Coach cancels an arranged session that cannot be rearranged or within 48 hours, the appointed provider will not be able to invoice for this session.

Section 6 timelines

The timelines for the tender process are as follows:

Activity	Date
ITT opens	Monday 4 th December
Deadline for bidders to submit any clarification questions in writing	Tuesday 11 th December
Webinar for contractor to respond to clarifying questions (recording will be made available afterwards)	Thursday 14 th December
Deadline for submissions	Friday 22 nd December
Bidders invited to clarification meetings (as required)	Friday 5 th Jan 2024
Clarification meetings (as required)	Week commencing Monday 8 th January
Successful bidder selected and unsuccessful bidders notified	Friday 12 th January
2-week standstill period	Friday 12 th January - Friday 2 nd February
Contract signed with successful bidder	Friday 2 nd February
First coaching session for cohort 1 (25 participants) start	Monday 4 th March

After contract signature, the contractor will have a 4-week mobilisation period. This includes:

- Allocating coaches to the programme
- Matching coaches to participants
- Organisation of first sessions
- Any other activities the contractor deems necessary to deliver the contract.

The first coaching sessions for cohort 1 (25 participants) start – Monday 4th March.