



The Planning  
Inspectorate

## Organisation Development & Design

Contract Reference: 17-2-772

26 January 2018



## Invitation to quote for the provision of Organisation Development & Design

The Planning Inspectorate has identified a requirement for the provision of an OD&D Partner to assist with our Transformation Programme and hereby invites you to submit a proposal for the service.

To ensure fairness, all suppliers are required to submit their proposals in accordance with the instructions provided. Failure to do so could invalidate your proposal.

Thank you for taking the time to consider working with the Planning Inspectorate, I look forward to hearing from you and encourage you to ask any questions should you require any clarification once you have reviewed all of the documentation.

Please contact me if you have any queries on 0303 444 5003 or [daisy.symes@pins.gsi.gov.uk](mailto:daisy.symes@pins.gsi.gov.uk).

Yours sincerely

*Daisy Symes*

Daisy Symes  
**Commercial Manager**

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# 1. Introduction

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## Introduction to the Planning Inspectorate

- 1 The Planning Inspectorate is an Executive Government Agency in the Ministry of Housing, Communities and Local Government and the Welsh Government. We are responsible for:
  - national infrastructure planning, which includes large scale projects such as harbours, power generating stations (including wind farms) and electricity transmission lines (nationally significant infrastructure projects - NSIP);
  - planning and enforcement appeals;
  - examining local plans and community infrastructure levy charging schedules;
  - listed building consent appeals;
  - advertisement appeals;
  - reporting on planning applications that are called in for the Ministry of Housing, Communities and Local Government's Secretary of State to decide;
  - compulsory purchase orders;
  - rights of way cases;
  - cases arising from the Environmental Protection and Water Acts, the Transport and Works Act and other Highways Legislation;
  - applications for awards of costs which may arise from any of the above.
- 2 Our headquarters are in Bristol, where about 350 administrative support staff and senior management are based. We also have a small office in Cathays Park, Cardiff which deals with casework arising in Wales. Administrative staff carry out a wide range of functions such as those relating to all aspects of casework administration (including dealing with the public); providing direct support for Inspectors, formal decision making for some types of casework and ensuring essential organisational support through the provision of Corporate Services such as Finance, Commercial, HR and Information Technology.
- 3 Appeals are determined and recommendations are made by our home-based workforce which consists of some 300 Planning Inspectors, all of whom are professionally qualified (for example, as town planners, architects, lawyers or engineers). They come into the office infrequently but they are provided with remote access to the Planning Inspectorate's ICT systems. In addition we contract with approximately 50 Non-Salaried Inspectors who provide their own working accommodation.
- 4 More information about the Planning Inspectorate is available at:  
<https://www.gov.uk/government/organisations/planning-inspectorate>

## Strategic Plan and Transformation

- 5 The Planning Inspectorate's Strategic Plan for 2017-2020 (Annex A) has three clear Strategic Priorities:



- 6 To deliver these priorities, a Transformation Programme has been established and work is now underway in most areas following approval to proceed (and associated funding) from the Ministry of Housing, Communities and Local Government.
- 7 The Programme contains the following 5 workstreams:
- **Operational Delivery Transformation**  
Transforming our end-to-end operational delivery processes
  - **Customer**  
Delivering excellent customer service
  - **People**  
Improving skills, developing leaders and creating a positive culture
  - **Digital**  
Unlocking better ways to do our work to make us more efficient
  - **Organisational Agility**  
Reacting quickly to change and in the right way
- 8 Workstreams are led by Objective Workstream Leaders. They are accountable for the timely delivery of all the work within their workstream. Each workstream operates a Board that meets, in most, cases every month. The Board is formed by staff from around PINS. The Board's role is to ensure projects are supported, within budget and delivered in a timely fashion. The core Transformation team co-ordinate all transformation related activity.

## 2. The Requirement

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### Background

- 9 Under the Organisational Agility workstream of the Transformation Programme, an OD&D project has been formed to develop a more efficient and effective organisational design.
- 10 Our current structure does not provide the agility needed to meet changing demands from external and internal environments. Neither does it lend itself to clear career paths for staff or cross functional working. It has a traditional hierarchy structure, divided into 6 functional Directorates:
- **Corporate Services**  
Human Resources, Finance, Commercial, Performance, Governance, Strategic Support and Digital services
  - **Volume Casework**  
Planning Casework, Planning Enforcement and Specialist Operations
  - **Major Casework**  
National Infrastructure, Major Casework, Plans and S62 Casework
  - **Inspectors**  
Inspectors and Inspector Support Team
  - **Transformation**  
Core Transformation Team
  - **Wales**  
All Welsh casework
- 11 Generally speaking there are 9 layers of staff who support our homebased Inspector workforce. Inspectors are structured in 3 grade bandings, dependant on expertise. Physically, staff are located as follows:



#### Temple Quay House

- c350 support workers
- Executive Team



#### Cathays Park

- c20 support workers
- Dir. of Wales



#### Home based

- c300 Inspectors
- c80 NSIs

- 12** Work and thinking has begun on the project which is being led by the Inspectorate's Chief Executive, Sarah Richards. This has included early work with Civil Service OD&D team and learning from other similar organisations.
- 13** There are close dependencies and linkages with other projects which will be running concurrently with the OD&D Project, most significantly these are:
- The **Operational Delivery Transformation (ODT)** (another of the workstreams) which is looking at our end-to-end processes and systems and we envisage will bring about major change for the organisation, ultimately changing our shape and size. We have already entered into a partnership with an external supplier, Rainmaker Solutions, to deliver the Discovery phase of the ODT project which is due to end at the beginning of March.
  - The **Corporate Services Directorate Review project** which has been established with the aim of reviewing the operating models, structures and skills needed for the future. As with much of the rest of the Transformation Programme, investment in our people and systems will take place with the expectation of improved services and financial savings. Discovery phase of the project is close to completion which will be followed by a period to reflect and plan which will last until the end of the financial year. A Project Manager has been brought in on a temporary basis to drive this project forward.
  - An **Equal Pay Audit** is well underway to inform our future overall Reward Strategy. In agreement with the Trade Union Side, we have undertaken an equal pay audit as a first priority and are now carrying out a fair pay audit, which will encompass concerns around pay progression. We have appointed an external supplier, Korn Ferry Hay Group to help us in this piece of work, acting as an independent voice, providing positive challenge and advising us on any areas where a business case should be made for further funds.

## Deliverables

- 14** We require a partner to provide professional and experienced practitioners who will align the design of our organisation with our objectives, with the ultimate aim of improving efficiency and effectiveness. The work includes:
- understanding the imperative for change, the environment and culture;
  - understanding the business processes, workflows, roles, responsibilities, volumes of work, activity analysis and resources;
  - designing and testing new models/structures, recommending the best solution for the Inspectorate;
  - planning and managing the transition from the old structure to the new;
  - implementing and monitoring the change, ensuring it is woven through the project; and

- transferring knowledge to the Inspectorate to improve our capability in this field.

**15** Through the project, we want to be an organisation:

- with a diverse workforce that embraces inclusivity and demonstrates the '1PINS' ethos (an aspiration that we are all one organisation, working together to achieve our strategic priorities with a positive culture)
- with a workforce made up of motivated and empowered people with the right skills, doing satisfying work, able to work flexibly across work areas
- that understand the skills and competencies required for each role
- with leaders and managers that are inspiring, confident and empowering (CS Leadership Statement)
- that is agile and able to respond to changes in the external world flexibly and includes a 'horizon scanning' capability
- where continuous improvement is 'the way we do things around here'
- where the customer is at the heart of all we do
- where the structure is aligned with the strategic direction of the organisation
- that provides opportunity for career development and progression
- that enables information flows through informal networks
- where spans of management control are appropriate to the work
- that represents value for money for the UK tax payer

**16** As explained in this requirement, other key projects have involvement from external resources and the successful supplier for this contract will be expected to work effectively alongside and in partnership with them to deliver the best results for the Inspectorate.

**17** The whole organisation is in scope of this project.

### **Timescales**

**18** We require the contract to be fully mobilised and work to commence no later than 5 March 2018 to meet the timescales within the project.

**19** Please provide a high level delivery roadmap for the project in your proposal, with key milestones and dependencies on the Inspectorate clearly illustrated and explained.

**20** Time is of the essence for this contract.



## The team

- 21** The successful supplier will need to provide a cross-functional team of experts to deliver the project who have the required skills and experience. We ask that a project lead is provided to front the team, co-ordinate activity and streamline any communication channels.
- 22** The successful supplier must provide full information of their proposed team in their tender who must also attend the evaluation interview. Any changes to the proposed team must be approved by the Inspectorate prior to their implementation. We also reserve the right to request that individuals are removed from the contract if we deem they are not suitable and/or capable.
- 23** The successful supplier must ensure that a continuous and consistent service is provided, ensuring that substitution can be provided in the event that resource is not available or deemed not suitable/capable by the Inspectorate.
- 24** A clear escalation route for any poor performance or issues must be defined.
- 25** A core team for the project has been established in the Inspectorate. Led by the SRO for the project (our Chief Executive), the team consists of the Director of Transformation, Director of Volume Casework, a HR Business Partner and Inspector Group Manager.

## Skills and experience

- 26** We want to work with a supplier who is able to demonstrate:
  - a flexible and insightful approach;
  - experience in a public sector/civil service culture;
  - a proven track record of delivering similar projects in organisations of a similar size to the Inspectorate;
  - change management experience in similar organisations;
  - proven track record of delivering within timescales and budget; and
  - extensive experience of Organisation Development and Design

## Location of assignment

- 27** Whilst attendance at our headquarters will be required from time-to-time, we ask that the supplier confirms how best this project is delivered. You will be expected to travel as required.

## 3. Supplier event

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- 28** All suppliers are invited to attend a briefing on 12 February 2018 from 10am in central Bristol to find out more about the work we are doing and the OD&D project.
- 29** Those wishing to attend must email [daisy.symes@pins.gsi.gov.uk](mailto:daisy.symes@pins.gsi.gov.uk) by 9 February 2018 with the names of attendees.

### Agenda

- 30** An agenda will be sent to all suppliers prior to the event. It is likely to include an introduction to our organisation, information on the project, the procurement process and a Q&A session.

### Venue

- 31** 2 Rivergate, Temple Quay, Bristol, BS1 6ED.
- 32** A location map can be viewed [here](#).
- 33** As this is a government building, only pre-registered attendees will be permitted to enter.



## 4. Procurement & key dates

Activity	Key Date
<b>Invitation to tender issued</b> The tender will be issued through the CCS portal to suppliers in Lot 2 of the framework and published on Contracts Finder (for information only).	29 January 2018
<b>Supplier event</b> Event to take place in Bristol, see paragraphs 28 - 33 for full information and/or instructions on how to register your interest	12 February 2018
<b>Final date for submission of questions</b> Please submit any questions you may have by 5pm on this date to <a href="mailto:procurement@pins.gsi.gov.uk">procurement@pins.gsi.gov.uk</a>  <small>Questions and answers will be provided to other tenderers however any such information will be made anonymous before being passed on. The Planning Inspectorate reserves the right to respond to such enquiries where this would be inappropriate.</small>	13 February 2018
<b>Tender deadline</b> Tenders must be submitted through CCS' portal no later than 2pm. Tenders received after this deadline will not be accepted.	20 February 2018
<b>Evaluation</b> The Planning Inspectorate will evaluate all tenders in accordance with the evaluation criteria	21 February 2018
<b>Interviews</b> The key members of the team who will undertake the project must attend the interview	W/C 26 February 2018
<b>Notification to successful bidder</b> A formal acceptance letter will be issued to the successful bidder and the contract will commence	28 February 2018
<b>Work commences</b>	5 March 2018

## 5. Evaluation

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- 34** The Contract shall be awarded to the most economically advantageous tender scored in accordance with the following evaluation criteria matrix.
- 35** Evaluation will be carried out in 2 stages:
- Stage 1 – Evaluation of tenders submitted
  - Stage 2 – Interview evaluation

### Scoring

- 36** Tenders will be scored against the criteria in Annex B.
- 37** Criteria will be scored on a scale of 0-5 in accordance with the Planning Inspectorate's standard scoring guide as shown below.



### Stage 1 – Evaluation of tenders submitted

- 38** The tenderer should meet all essential criteria in Annex B. Should any of the essential criteria not be met, the tender will be 'Failed' and no further evaluation of the tender will be completed.
- 39** The Inspectorate will evaluate the **quality and cultural fit** of all tenders in accordance with the evaluation matrix in Annex B. The evaluation will be calculated as follows:
- The evaluation panel will review tenders and agree a quality score by rating tenders on a scale of 0-5 for each criterion. Where a criterion has been weighted, the score given will be multiplied by that weighting resulting in a weighted score. The scores will be added together for each Supplier giving a total weighted score.

- If the final agreed score for any criterion is less than 3 (meets expectations), the tender will be 'Failed' and no further evaluation of the tender will be completed.

**40** Tenders are asked to propose a fixed **price** for the contract. The pricing evaluation will be calculated as follows:

- The fixed price will be scored as a percentage of the score in the pricing criteria. The lowest value will score the maximum score available (100%).
- The lowest final evaluation prices will receive the maximum scores and all other tenders will be reduced by reference to the lowest price using the "Lowest Cost Price Scoring Methodology".
- The pricing provided by the winning tenderer will be taken across in any agreed contract.

**41** For the avoidance of doubt, any tender which is double that of the lowest price tender will receive a zero score for this criterion.

**42** The total evaluation score will be broken down as follows:

- Quality: 50%
- Cultural fit: 20%
- Price: 30%

**43** Tenders will be then ranked and the top 3 will be invited to stage 2, an interview. Although we do reserve the right to invite more or less as we see fit.

## **Stage 2 – Evaluation interview**

**44** The suppliers shortlisted in Stage 2 will be invited to an interview and will be evaluated in accordance with the evaluation criteria provided in Annex B. The quality and cultural fit scores from this Stage 2 of the evaluation will supersede the respective scores determined in Stage 1.

**45** All key members of the proposed team must be available for interview so that we can meet the people we will be working with. Please also see paragraphs 21-25 regarding the team.

**46** At interview, the shortlisted tenderers shall present their proposal and the customer will ask a series of questions and will score them using the criteria set out in Annex B. There will be no duplication of criteria already assessed in stage 1 of the evaluation.

**47** The evaluation will be calculated as follows:

- Evaluators will agree a final score for each criterion of the evaluation matrix in Annex B.

- If the final agreed score for any criterion is less than 3 (meets criteria), the tender will be 'Failed' and no further evaluation of the tender will be completed.

**48** The total evaluation score for stage 2 will be calculated as follows:

- Quality: 20%
- Cultural fit: 50%
- Price: 30% (from stage 1)

**49** Tenders will be then ranked and the highest scoring supplier will be awarded the contract.

## 6. Other Matters

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### Duration of the Contract

- 50** The duration of the contract will be from contract award until 31 March 2019 with an option to extend for a further 1 + 1 years. Any option years taken will be subject to satisfactory performance and business need.
- 51** The Planning Inspectorate reserves the right to contract with the supplier for additional pieces of work i.e. change management, specialist expertise etc and costs/outputs will be agreed in advance based on the daily rates provided.

### Terms and conditions of contract

- 52** The contract will be subject to the terms & conditions of the following Crown Commercial Service framework:
- Framework ref: RM3745 - Management Consultancy Framework
  - Framework name: Lot 4 – HR

### Contract changes

- 53** Any changes to the agreed scope/cost of the contract must be authorised by the Planning Inspectorate's Commercial Team by variation order **prior** to the commencement of work without exception. Any work undertaken which has not been specifically authorised by the Planning Inspectorate must not be invoiced.

### Transparency

- 54** Tenderers should be aware that in accordance with the Government's transparency agenda, the Inspectorate will publish the following information on data.gov.uk:
- This ITT and all related documentation
  - The resultant contract (except any information which is exempt from disclosure in accordance with the provisions of the Freedom of Information Act)
- 55** In addition to the above the Inspectorate publishes all spend in excess of £250. This spend is published on a monthly basis and can be viewed on DCLG's website and data.gov.uk.
- 56** Further information on the Government's transparency agenda is available via the 'Programme for Government' website:  
<http://programmeforgovernment.hmg.gov.uk>

## Conduct

- 57** The tenderer must not communicate to any person the tender price (even approximately) before the date of the contract award other than to obtain, in strict confidence, a quotation for insurance required to submit the tender.
- 58** The tenderer must not try to obtain any information about any other person's tender or proposed tender before the date of contract award.
- 59** The tenderer must not make any arrangements with any other person about whether or not they should tender, or about their tender price.
- 60** The tenderer must not offer any inducement to any member of the Planning Inspectorate's staff for doing or refraining from doing any act in relation to the tender.
- 61** If the tenderer engages in any of the activities set out in this section or if the Planning Inspectorate considers the tenderers behaviour is any way unethical we reserve the right to disqualify the tenderer from the procurement.

## Due diligence

- 62** While reasonable care has been taken in preparing the information in this requirement and any supporting documents, the information within the documents does not purport to be exhaustive nor has it been independently verified.
- 63** Neither the Planning Inspectorate nor its representatives, employees, agents or advisors:
  - i. makes any representation or warranty (express or implied) as to the accuracy, reasonableness or completeness of the ITT and supporting documents; or
  - ii. accepts any responsibility for the adequacy, accuracy or completeness of the information contained in the ITT and supporting documents nor shall any of them be liable for any loss or damage (other than in respect of fraudulent misrepresentation) arising as a result of reliance on such information or any subsequent communication.
- 64** It is the tenderer's sole responsibility to undertake such investigations and take such advice (including professional advice) as it considers appropriate in order to make decisions regarding the content of its tenders and in order to verify any information provided to it during the procurement process and to query any ambiguity, whether actual or potential.

## Costs and Expenses

- 65** Tenderers are not entitled to claim any costs or expenses from the Inspectorate which may be incurred in preparing tenders whether or not the tender is successful.



## 7. Your tender

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- 66** The tenderer shall provide a tender describing how they will deliver the outputs of Discovery and/or Change Management.

### Contents of your tender

- 67** The production of concise, succinct information is essential for this contract. The key elements of your tender should be covered in no more than 15 pages (excluding CVs), broken down into the following sections, providing the information listed as a minimum.

#### Section 1 – Your organisation

- Details of your organisation including information showing how your organisation is well placed to provide the services required.
- Case studies of successful delivery of similar work for Discovery and Change Management, including who you were commissioned by, the outputs, challenges, successes, innovation and value added.

#### Section 2 – The proposed team

- The proposed team/resource, their names, specific skills, qualifications, roles and experience, including CVs (which should not be more than 2 pages). Please note that the Inspectorate reserves the right to request that individuals are removed from the contract if we deem they are not suitable and/or capable.
- The team's/resource experience of similar projects in the Public Sector/Civil Service and for organisations of similar size to the inspectorate.
- Details on how the team will take responsibility for owning and resolving issues/problems and the proposed escalation route for any poor performance or issues.
- Details on how the team/resource will transfer skills/knowledge to the Inspectorate's staff as appropriate.
- Details on how you will ensure a continuous and consistent service, ensuring that substitution can be provided in the event that resource is not available or deemed not suitable/capable by the Inspectorate
- Details of any proposed Partners and/or Sub-contractors and a description of how any Partnership/Sub-contracting arrangement between contractors will operate. For the avoidance of doubt the selected tenderer will be the Prime Contractor responsible for delivery under the Contract.

### **Section 3 – Delivery**

- How you will deliver requirement.
- A delivery roadmap including key milestones and timescales.
- How risks will be identified, managed and communicated.
- How you will engage with stakeholders, including other delivery partners, external suppliers, senior managers and staff at all levels.
- Any dependencies for delivery on the Planning Inspectorate.

### **Section 4 - Commercial**

- Completed Cost Schedule (Annex C) the total fixed price and any other costs
- Contact name, telephone number and e-mail address.
- Unqualified acceptance of the call-off contract terms and conditions.