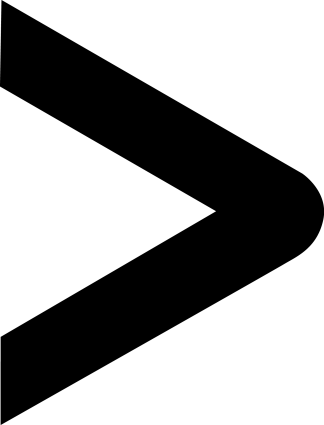


Management Information System: Invitation to Tender

Progress: Building Better Opportunities for young people across Coventry & Warwickshire

*Engaging and supporting NEET young people 15-24, and those at risk of becoming NEET*



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# Overview

*Groundwork UK is seeking an organisation to provide a management information system for data collection and reporting purposes for participants on the Progress programme. This programme is financed by the Big Lottery Fund and European Social Fund.*

# Context

There are upwards of 9,000 young people in Coventry and Warwickshire whose life chances are being damaged because they are not in employment, education or training (NEET). Many more are considered by their school or college to be at risk of becoming NEET. More still are missing out on the benefits of learning or work because they have dropped off official records and statistics altogether.

Groundwork UK has been successful in securing a grant for a Big Lottery Fund (BLF) and European Social Fund (ESF) co-financed programme called Building Better Opportunities (BBO).

Groundwork and its partners will deliver ‘Progress’ – a tailored programme of coaching support and bespoke activities to NEET and at risk of NEET young people aged between 15 and 24, enabling them to access training and employment opportunities. Progress brings together a unique partnership of local organisations – with support from local councils – to transform the prospects of some of the most marginalised young people in Coventry and Warwickshire. Our partnership will ensure that young people facing the most significant barriers to accessing learning and work are able to recognise their talents and realise their potential.

Delivery is due to commence in September 2016.

# About ‘Progress’

Progress aims to:

• help young people overcome the personal barriers and challenges preventing them from engaging positively in learning or work

• provide a clear pathway for young people to increase their skills and take the first steps on their future career path through training or employment

In order to achieve these aims we have developed a partnership that brings together leading youth and employment charities, organisations specialising in supporting young people with complex needs, colleges and training providers. Together, our focus will be on identifying and helping those young people most in need of support including care leavers, lone parents, young offenders, and young people with disabilities.

Progress will support at least 840 young people aged 15-25 years old, 40% of which will be unemployed and 60% classed as economically inactive. At least one fifth of those we support will be young people with disabilities and at least one in ten from a minority ethnic background.

Our approach will be to work closely together and collaboratively with local stakeholders, in particular local authorities, to provide an accessible and responsive service that encourages young people to succeed and provides clear pathways into positive progressions.

Our delivery model has been designed in consultation with young people and local stakeholders, and draws on a range of successful interventions delivered previously by partners. Central to our model is the deployment of **Progress Coaches** – experienced youth work professionals who will build trust with young people, encouraging them to set positive goals and helping them navigate a tailored path towards employment.

We will support young people through a **five-stage process**:

• **Getting on board** - using communications, outreach and referral arrangements with a range of partners to identify those most in need, ensure their eligibility and promote positive engagement in the programme.

• **Preparing and planning** - helping young people to identify hurdles they need to overcome and working together to develop an individually-tailored action plan containing clear goals and fostering ownership from the outset.

• **A pathway to success** - helping young people to access and benefit from specialist support services, offered from within the partnership and through local agencies, to help overcome personal challenges such as mental health issues, debt problems or substance misuse.

• **Building strengths** - using group work, training and volunteering to help young people grow in confidence or acquire new skills that will support their journey to employment.

• **Achieving goals** - identifying the most appropriate progression route for each young person, supporting a move into training or work and maintaining contact after the transition to help ensure success is sustained.

Our model is designed to be:

• **flexible** - providing intensive, long-term support to those who need it most while ensuring those who are ready to progress aren’t held back

• **tailored** - offering a bespoke path through the programme based on individual aims and aspirations

• **trusted** - using youth work approaches to build relationships that offer support and understanding but also push and challenge when required

• **integrated** - working closely with other local services and provision ensuring clarity for those involved and maximising the impact of the programme.

# The Opportunity

Groundwork UK is looking to contract an organisation to provide a management information system for the duration of programme. The successful system will allow us to gather, collate and analyse core participant data in line with ESF/BLF rules, and avoid the need for partners to transfer sensitive data through insecure means. The attached schedule, Appendix 3, is indicative of the data capture that will be required.

The Progress partnership will be led and managed by Groundwork UK, who will be responsible for ensuring high quality and compliant delivery within a supportive partnership framework, geared towards sharing learning and driving continuous improvement. Partnership governance arrangements will be underpinned by a Partnership Agreement setting out clear roles and responsibilities. Partners and stakeholders will oversee performance through an inclusive steering group, and a dedicated young person’s steering group will ensure activities remain relevant and youth-led.

The successful system will incorporate the following criteria:

The system needs to be sufficiently user-friendly for youth practitioners who are not technical experts to use every day. It will need to function as a tool for caseload management and enable practitioners to record contact and progressions.

Customer service and ongoing support is valued highly. Provider organisations will need to be highly responsive with a flexible approach and the ability and willingness to adapt the system throughout the duration of the programme based on feedback and evolving programme requirements. Groundwork UK will require a named single point of contact with an in-depth understanding of the system and particular needs of the programme.

The system should offer real-time data, feedback and analysis. The system needs to be web-based and accessible remotely.

It would be beneficial for the system to support data capture directly from young people, including via email, SMS, social media and surveys.

The system will need to meet the highest standards of data security and be able to withstand penetration testing. The successful organisation will need to demonstrate exemplary credentials with relation to data protection.

The system will need to provide a separate account for each delivery organisation using it, or means to ensure only members of their organisation can access relevant data. Each account needs to allow multiple logins to access its data simultaneously. Groundwork UK need to be able to create new user logins flexibly and on an ongoing basis, without additional charges.

The system will need to check for duplicate participant records across all accounts, using a unique reference number for each individual.

Account users will need to be able to create and update participant records. These will need to be able to record progression into and progress against relevant outcomes. It will need to allow users to upload documentary evidence to provide an audit trail for the programme.

The system needs to provide a central account function for Groundwork UK that allows oversight of each individual provider account, and pull together data from across all accounts. This needs to allow for the lead partner to approve or reject evidence uploaded by partners for financial claims from the user accounts.

The successful MIS will also allow both user accounts and the central account to easily produce reports and collate statistical information in a simple and intuitive manner, in a range of formats. A number of bespoke reports and exports will also be developed by the successful organisation.

The system needs to facilitate controlled participant data sharing to underpin good quality casework and efficient partnership working at a local level.

We are looking for an organisation with significant experience of providing management information systems for youth work- style programmes. The successful organisation must be committed to collaborative and flexible working and support for non-technical users.

An ongoing maintenance arrangement will need to be part of the contracted service, with ongoing support factored into the agreed cost of the system.

Successful organisations will be subject to a full due diligence process to assess financial management capacity, financial stability and relevant policies and procedures.

If system training is required, the successful organisation will provide this to core staff at Groundwork UK. Groundwork UK anticipates cascading training to partners itself.

The maximum budget available for the MIS is £51,480 including VAT.

**Delivery Dates**

Delivery is anticipated to start from September 2016. The successful MIS will need to be ready for implementation as soon as possible after the programme commences, and the ability to get the system running swiftly will inform our decision-making. The contract will run until December 2018.

# Procurement Process

1. Please complete Appendix 1: Tender Submission template below and submit it to [hayley.walker@groundwork.org.uk](mailto:hayley.walker@groundwork.org.uk) by **16:00 on Friday 26 August 2016.**
2. Groundwork will assess tenders and respond to all tenderers by **Friday 2 September 2016.**
3. The highest scoring tenderers may be invited to interview or to demonstrate their system at Groundwork UK (Central Birmingham) during week commencing **5 September 2016.**
4. The outcome of the process will be communicated by **Friday 9 September 2016**.
5. The successful tenderer(s) to meet with Groundwork UK during w/c **12 September 2016.**
6. System to be implemented as soon as possible after delivery commences inSeptember 2016.

# Further Information

For further information or clarification please email [contracts@groundwork.org.uk](mailto:contracts@groundwork.org.uk) stating “BBO MIS Tender” in the email subject line, or contact Jon Wells or Sarah Duncan on 0121 236 8565.

Full details of the Building Better Opportunities programme can be found on the Big Lottery Fund website <https://www.biglotteryfund.org.uk/esf>.

Full guidance documents from the Big Lottery Fund can be found here: <https://www.biglotteryfund.org.uk/global-content/programmes/england/building-better-opportunities/building-better-opportunities-resources>

|  |  |
| --- | --- |
| Appendix 1: Tender Submission: Building Better Opportunities Data collection/ MI | |
| Your name |  |
| Organisation name |  |
| Contact details  (address, telephone number & email address) |  |
| Please describe your experience of providing MIS to similar programmes  (maximum 500 words) |  |
| Please describe how your system meets the specification outlined in ‘The Opportunity’  (maximum 2000 words) |  |
| Please provide a detailed account of your data security protocols and how you would ensure personal data is kept secure  (maximum 300 words) |  |
| Please provide some examples of when you have responded flexibly to the needs of a customer  (maximum 300 words) |  |
| Please provide a detailed breakdown of your associated costs  (maximum 300 words) |  |
| Please provide an outline implementation plan leading up to the system becoming operational. Please provide key milestone dates relating to when you anticipate development, testing and full functionality to be complete  (maximum 100 words) |  |

# Appendix 2: Scoring matrix

|  |  |  |  |
| --- | --- | --- | --- |
| **Question** | **Selection or Assessment Criteria?** | **Scoring Guide** | **Max. Score** |
| *Please describe your experience of providing MIS to similar programmes* | Selection criteria | 0 – no relevant experience and/or examples provided  1 – limited experience and/or examples provided  2 – moderate experience and/or examples provided  3 – detailed experience and/or examples provided, meeting specification | 3 |
| *Please describe how your system meets the specification outlined in ‘The Opportunity* | Selection criteria | 0 – meets limited aspects of specification  1 – meets adequate aspects of specification  2 – meets all aspects of specification  3 – exceeds specification | 3 |
| *Please provide a detailed account of your data security protocols and how you would ensure personal data is kept secure* | Selection criteria | 0 – insufficient detail of data security protocols  1 – adequate detail of data security protocols  2 – detailed account of data security meets best practice | 2 |
| *Please provide some examples of when you have responded flexibly to the needs of a customer* | Selection criteria | 0 – irrelevant or no examples provided  1 – examples demonstrate some experience of responding flexibly  2 – examples demonstrate willingness and experience of responding flexibly | 2 |
| *Please provide a detailed breakdown of your associated costs* | Selection criteria | 0 – no costs provided/costs exceed allocated budget  3 – costs within allocated budget | 3 |
| *Please provide an outline implementation plan leading up to the system becoming operational. Please provide key milestone dates relating to when you anticipate development, testing and full functionality to be complete* | Selection criteria | 0 – not answered  1 – operational three or more months from contract award  3 – operational between one-two months from contract award  6 – operational within 4 weeks of contract award | 6 |
| **TOTAL** |  |  | **19** |

**Appendix 3: Example Data Capture**

|  |  |
| --- | --- |
| Participant entry form  **For participants and project staff to complete** |  |

This form must be completed before any activities are undertaken as part of the project.

These details will be stored securely and retained at least until 31 December 2026, in compliance with the Data Protection Act 1998. This information will only be used for the evaluation of this project and for reporting to the Big Lottery Fund and European Social Fund for monitoring purposes.

For the purposes of the Data Protection Act 1998, the Department for Work and Pensions is the data controller in respect of information processed which relates to your participation in the project funded by the European Social Fund, whilst the Big Lottery Fund is the data processor.

Part one: Summary

This is completed by project staff once the participant’s eligibility has been confirmed.

|  |  |
| --- | --- |
| **Organisation:** |  |

|  |  |
| --- | --- |
| **Participant name:** |  |

|  |  |
| --- | --- |
| **Participant ID:**  This must be unique to each participant |  |

|  |  |
| --- | --- |
| **Start date with project:**  This is the date of their first activity on the project |  |

**Referral information:**

If the participant has been referred to the project by a third party, such as Jobcentre Plus, the Careers Service or another provider in the area, provide details here.

|  |
| --- |
|  |

**Project background:**

If you’re aware that the participant has taken part in another Building Better Opportunities project funded by us in your area, provide details here.

|  |
| --- |
|  |

Part two: Your details

**Title:**  Mr  Mrs  Ms  Miss

|  |  |
| --- | --- |
| **Forename(s):** |  |

|  |  |
| --- | --- |
| **Surname:** |  |

**Gender:**  Male  Female  Prefer not to say

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Date of birth:** |  | / |  | / |  |

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Address:** | House number |  |
|  |  | Address line 1 |  |
|  |  | Address line 2 |  |
|  |  | Address line 3 |  |
|  |  | County |  |

|  |  |
| --- | --- |
| **Postcode:** |  |

|  |  |
| --- | --- |
| **Phone number:** |  |

|  |  |
| --- | --- |
| **Mobile number:** |  |

|  |  |
| --- | --- |
| **Email address:** |  |

Part three: Your ethnicity

Tick **one** category that you feel best describes your ethnic origin:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Asian/Asian British:**  Indian  Pakistani  Bangladeshi  Chinese  Other background  **Black/Black British:**  Caribbean  African  Other background | **Dual heritage:**  White and Black Caribbean  White and Black African  White Asian  Other background  **Other ethnic group:**  Arab  Other background | **White:**  British  English  Northern Irish  Scottish  Welsh  Irish  Gypsy, Irish Traveller or Roma  Other background | | | |
| In addition to this, do you identify yourself as being Cornish? | | Yes | No | |
| If you would prefer not to give your ethnicity, please tick here: | | |  |

Part four: Your eligibility

We need to check that you have the right to live and work in the UK. This means we need you to provide **one** item of evidence from the list below. We must see an original and we will make a photocopy for our own records.

Tick **one** box to confirm the item of evidence you’re providing:

|  |  |
| --- | --- |
|  | A National Insurance number, either in the form of the plastic card or a letter from HMRC. |
|  | A full passport showing that you are a British citizen or a national from a European Economic Area country. |
|  | If you are not a national of an European Economic Area country, a full passport either endorsed with indefinite leave to remain (settled status) or includes a work/residency permit or visa stamp (unexpired) with all related conditions met. |
|  | An Identity Card issued by the Home Office confirming their right to stay, work or study in the UK. |
|  | A letter from the UK Immigration and Nationality Directorate or the Home Office granting indefinite leave to remain or with no time limit on your stay. |
|  | A full birth or adoption certificate, issued by the UK or a European Economic Area country. |
|  | A marriage or civil partnership certificate, if their partner has the legal right to live in the UK and this can be evidenced. |

By ‘**European Economic Area**’, we mean all EU states plus Iceland, Liechtenstein, Norway and Switzerland.

Part five: Your employment status

We need to check if you are:

* not working and **unemployed**, which means you are currently looking for work and may be receiving unemployment benefits of some kind **or**
* not working and **economically inactive**, which means you are not currently looking for work for some reason.

We need you to provide **one** item of evidence from the list below. We must see an original and we will make a photocopy for our own records.

Tick one box below to confirm the item of evidence you’re providing:

|  |  |
| --- | --- |
|  | **If you’re registered unemployed**, a letter or document from the Department for Work and Pensions confirming this. |
|  | **If you’re unemployed but not registered unemployed,** a letter or document from a government agency, such as the Careers Service, confirming this. |
|  | **If you’re economically inactive,** a letter or document to support this, such as a doctors letter, entitlement to state retirement pension letter or correspondence from an educational establishment. |

Are you unemployed or inactive?Tick **one** category:

**Unemployed** or

**Economically inactive.**

|  |  |
| --- | --- |
| In months, how long have you been out of work? |  |

Are you currently in education or training?  Yes  No

If **yes,** tell us more about it. Include details of the course, institution or provider.

|  |
| --- |
|  |

Are you currently claiming any benefits?  Yes  No

If **yes,** which ones?

|  |  |  |
| --- | --- | --- |
| IB/ESA or other sickness related benefit | | Disability Living Allowance |
| Jobseeker’s Allowance | | Income Support |
| Other – please state: |  | |

Are you in paid work of any kind?  Yes  No

If **yes,** then you are ineligible for support through this project.

Part six: Your education

Tick **one** option below for the highest level of education or qualification you currently hold:

|  |  |
| --- | --- |
|  | None. |
|  | Primary or lower secondary education. |
|  | NVQ Level 1-3, GCSE/CSE/GNVQ, Higher Education, AS/A2/A levels. |
|  | NVQ level 4-5, degree or post-graduate diploma. |

Have you had education up to least NVQ level 1 or NVQ level 2 in **English**? This includes GCSE/CSE or other similar qualifications, including English for Speakers of Other Languages (ESOL).

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Have you had education up to at least NVQ level 1 or NVQ level 2 in **maths**? This includes GCSE/CSE or other similar qualifications, including ESOL.

|  |  |
| --- | --- |
|  | Yes |
|  | No |

Part seven: Household situation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Are you currently homeless?** | Yes | | No  Prefer not to say | |
| **Not including yourself, do you currently live or stay with at least one adult?** | | Yes | | No  Prefer not to say |
| **Including yourself, is everyone you live or stay with out of work?** | | Yes | | No  Prefer not to say |
| **Do you live with children you have responsibility for?** | | Yes | | No  Prefer not to say |
| **Do you have sole caring responsibility for a child?** | | Yes | | No  Prefer not to say |

Part eight: Other information

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Are you an offender or ex-offender?** | | | Yes | | No  Prefer not to say | | |
| **Do you consider yourself to have a limiting long-term health condition or disability?**  This is a physical or mental impairment that has a substantial and long-term negative effect on your ability to do normal daily activities. | | | | | | Yes | No | |
| Prefer not to say | | |
| **Do you consider yourself to have a work limiting health condition?**  This is a health condition that has an impact on your ability to work or remain in work and may only be short-term. | | | | | | Yes | No | |
| Prefer not to say | | |
| **What is your sexual orientation?** | Heterosexual | Bisexual | | Gay/Lesbian | | Prefer not to say | | | |

Part nine: Participant declaration

Tick **each** box to confirm:

|  |  |
| --- | --- |
|  | I know that the support I will be offered is funded by the European Social Fund and the Big Lottery Fund. |
|  | The information provided in the form is, to the best of my knowledge, accurate. |
|  | I am not in paid work of any kind, including any zero hours contract. |
|  | If I have ticked a ‘Prefer not to say’ option anywhere on this form, I confirm that I am refusing consent for this information to be collected for the purposes of equality monitoring. |
|  | I give permission for my personal details to be shared and stored in a secure manner with the Big Lottery Fund and other authorised bodies. |
|  | I understand that this information will be retained until at least 31 December 2026 for evaluation purposes. After that time, it will be destroyed in a secure manner. |
|  | I may be contacted at any time to discuss my involvement in the project. |
|  | I give permission for my details to be shared with other partners involved in the delivery of this project. |

|  |  |
| --- | --- |
| **Name:** | **Signature:** |
| **Date:** |

Part ten: Project officer declaration

Tick **each** box to confirm:

|  |  |
| --- | --- |
|  | The participant has been told that the support they’ll be offered is funded by the European Social Fund and the Big Lottery Fund. |
|  | The information provided in the form is, to the best of my knowledge, accurate. |
|  | I have checked that the participant has the right to work in the UK and have signed a photocopy of an original document that I have had sight of. |
|  | I have checked that the participant is unemployed or economically inactive and have signed a photocopy of an original document that I have had sight of or, where this isn’t possible, I am confident that the participant has an eligible employment status. |
|  | I understand that this form and the items of evidence provided must be retained until at least 31 December 2026. |
|  | I understand that the Big Lottery Fund, or other authorised bodies, may request to see this information at any time and that it can only be shared in a secure manner and never emailed. |

|  |  |
| --- | --- |
| **Name:** | **Signature:** |
| **Job title:** |
| **Organisation:** |
| **Date:** |