

# Expression of Interest

## Project Details:

<b>Project Name</b>	GSS25091 Specialist training and coaching in continuous improvement (including but not limited to Lean Six Sigma, Agile, Business Agility, change leadership)
<b>Response required by</b>	7 <sup>th</sup> February 2025
<b>Response required to</b>	CoreServices@uksbs.co.uk

## Description of the Project

### **Summary**

UK Shared Business Services Ltd (UK SBS) on behalf of Science and Technology Facilities Council (STFC), a constituent part of UK Research and Innovation (UKRI), are seeking a partner to provide a programme of specialist training and coaching in continuous improvement.

### **Aims**

The overall ambition is to further embed a culture of Continuous Improvement across STFC

In order to achieve the ambition STFC are seeking to develop cohorts of staff within Departments and Directorates from across the organisation such that each individual cohort member delivers an improvement project. STFC require this cohort to become skilled in the tools and techniques of Lean Six Sigma (LSS), combined with the agile project delivery methodology to ensure pragmatic execution of CI projects with an appropriate sense of urgency (e.g. Kanban and/or Scrum). To support the cohort through their first improvement project, STFC require individual follow-on coaching throughout the improvement project lifecycle.

The expected outcome as a result of the training and coaching is that each of the delegates understand the CI/Agile processes to successfully deliver their follow-on project, resulting in an improvement gain for STFC. If deemed impactful, it will guarantee development of further cohorts of CI practitioners year on year.

Furthermore, ensuring STFC gain the buy-in of the senior leaders in this initiative is essential, therefore STFC additionally require an intervention that raises awareness of LSS, business agility and Agile delivery methods. The objective being to:

- create a collective understanding and language that is used and will be used across STFC when discussing improvements;
- encourage sponsorship of improvement projects across departments; and
- the increased likelihood of embedding a culture of CI, empowerment of teams, distributed authority and radical transparency.

As departments capability and maturity in CI grows, and departmental CI programmes are implemented, STFC require training and coaching for departmental CI leads, enabling and

empowering them to co-create CI programmes that are sustainable, promote the culture that 'CI is everyone's responsibility', and gain further traction and buy in from all staff.

#### Future ways of working in departments/directorates of STFC

Learning from the ways STFC have worked on multi-national projects, and capitalising on the appetite staff have to work differently in the future, the STFC CI lead team would like to provide the Directorate teams the opportunity to explore business agility models. This will allow teams to pilot different models, project delivery methods and stimulate cultural change, to improve the effectiveness of the delivery of products, services, software, and value to internal and external customers, but most importantly to preserve and improve the happiness and wellbeing of staff. Ultimately, this will continue to evolve a culture which encourages experimentation and innovation, develops deep trust, generates radical transparency, and enables distributed authority.

After attending the training and/or coaching, STFC expect the Department Directors and their senior teams to be in a position to develop detailed action plans to trial within their departments and teams.

### **Objectives**

#### Embedding Continuous Improvement

The key performance indicators include:

- All senior leader attendees have an awareness of the LSS tools, techniques and the Define-Measure-Analyse-Improve-Control (DMAIC) framework. Along with the Agile project delivery methods. Understand how they could benefit STFC and their departments.
- Most senior leader attendees agree that the LSS/Agile approach would add value to the organisation, can identify and sponsor relevant CI opportunities
- All improvement projects undertaken by the trained cohorts are successfully completed, follow the DMAIC process and the individuals feel confident to lead a future project

#### Redesigning our future ways of working

The key performance indicators include:

- All attendees understand how the different business agility frameworks, methodologies and thinking discussed on the course(s) can benefit their Directorates/Departments and are able to develop plans to implement these ideas.
- All trained teams have a knowledge of delivering projects using the Agile methodology and understand the cultural aspects to embed it successfully.
- Evidence of CI methodologies used in day-to-day activities across the organisation.

### **Requirement**

The requirement is to deliver the following training and coaching packages to develop continuous improvement and business agility capability.

#### Ambition: Embedding a culture of CI

#### Blended Lean Six Sigma and Follow-on Coaching – Yellow Belt

Providing training to 3 cohorts of 10-12 people, preferably delivered in person at one of STFCs sites (virtual a second choice), and educating the individuals in a framework, tools and techniques, and an effective methodology to lead improvement projects and become the central "engine" for process led improvements across the business. The length of the

course will be determined by the supplier (circa. 2-3 days) and delivered over a number of consecutive days.

Staff will attend the course having been allocated an improvement project which they will lead after the training, STFC will share these draft charters with the supplier once the contract is awarded. It is expected that the course will refer to how the LEAN/Six Sigma tools and techniques can be applied to the improvements STFC hope to make.

STFC expect the successful organisation to equip the cohorts to be able to:

- Use change management and soft techniques to lead change effectively
- Apply technical Lean Six Sigma skills to deliver sustainable change (technical skills to be demonstrated to at least Lean Six Sigma Yellow Belt standard)
- Use Agile project management techniques to ensure pragmatic execution of CI projects with an appropriate sense of urgency (e.g. Kanban and/or Scrum)

To effectively support staff in delivering their first projects, post-course coaching support is also required; providing the expertise and building the confidence of the project leaders in delivering their first project effectively. The level of coaching required may differ by size of project, time to complete and experience and confidence of the individual, therefore STFC would like the opportunity to flexibly apply a block of coaching (c.150 hours, or 5 hours per project) within the 25/26 financial year.

At the end of the course and project delivery, attendees should have the confidence and enthusiasm to undertake and deliver their own improvement projects within their departments.

The trainer and coach(es) must have a strong track record in successfully leading and implementing improvement projects and preferably expertise of working in a scientific, technology based public sector environment.

At the end of the course, and following successful completion of the examination and assessment of the project, STFC expect each person to be externally certified by a relevant accreditation body.

#### Lean Six Sigma and Follow-on Coaching – Green Belt

Providing training to 10 individuals, preferably delivered in person at one of the STFC sites (virtual a second choice) and educating the individuals in a framework, tools and techniques, and an effective methodology to lead improvement projects and become the central “engine” for process led improvements across STFC. The length of the course will be determined by the supplier and delivered over a number of consecutive days.

Staff will attend the course having been allocated an improvement project which they will lead after the training, STFC will share these draft charters with the supplier once the contract is awarded. It is expected that the course will refer to how the LEAN/Six Sigma tools and techniques can be applied to the improvements STFC hope to make.

It is expected that the successful organisation will equip attendees to be able to:

- Use change management and soft techniques to lead change effectively
- Apply technical Lean Six Sigma skills to deliver sustainable change (technical skills to be demonstrated to at least Lean Six Sigma Green Belt standard)
- Use Agile project management techniques to ensure pragmatic execution of CI projects with an appropriate sense of urgency.

To effectively support our staff in delivering their first projects, post-course coaching support is also required; providing the expertise and building the confidence of the project leaders in delivering their first project effectively. The level of coaching required may differ by size of project, time to complete and experience and confidence of the individual, therefore STFC would like the opportunity to flexibly apply a block of coaching (c.100 hours, or 10 hours per project) within the 25/26 financial year.

At the end of the course and project delivery, attendees should have the confidence and enthusiasm to undertake and deliver their own improvement projects within their departments.

The trainer and coach(es) must have a strong track record in successfully leading and implementing improvement projects and preferably expertise of working in a scientific, technology based public sector environment.

At the end of the course, and following successful completion of the examination and assessment of the project, STFC expect each person to be externally certified by a relevant accreditation body.

#### Change management and facilitation skills for staff leading change initiatives

In a VUCA (volatility, uncertainty, complexity, and ambiguity) world, where constant change is necessary to keep pace with our collaborators and customers, effective capability to lead staff through change initiatives is key to the success of those changes. This includes knowledge of change management tools and processes and business agility, in addition to effective team working tools and facilitation techniques.

STFC are looking for training and guidance on state-of-the-art thinking and how to apply it within the organisation:

- The VUCA environment, why we need to manage change
- Key enablers (e.g. new behaviours, new ways of thinking, empowering teams, servant leadership, psychological safety, growth mindset, ask versus tell, etc.)
- Key techniques (communication, vision, stakeholder engagement, embedding the change)
- Frameworks and tools which can help us to apply the thinking (e.g. facilitation techniques, Kanban etc.)

STFC want to stimulate intrapreneurial / entrepreneurial mindsets, and to encourage radical change across our organisation. Training should be delivered in person

(preference, virtual is acceptable) and it is anticipated for 3 cohorts of c. 10-12 people.

The trainer(s) must have a strong track record in successfully leading and implementing change initiatives and preferably expertise of working in a scientific, technology based public sector environment.

#### Lean Business Agility Overview for Leadership

One day virtual/in person training for c.24 senior leaders across the organisation (likely 2 cohorts of 12 people each) to provide them with an understanding of Lean Agile approaches, and enable them to become active ambassadors able to champion projects and support transformational activity effectively, demonstrating themselves the mindset and cultural shift necessary to encourage business agility across what STFC do and how the business works to drive innovative thinking, which allows us to maintain our world-leading status.

The success of building an appetite for a Lean Agile culture across the organisation depends on the buy-in of these individuals. It is expected that this overview includes case studies and/or presentations from CEOs/COOs at similar organisations who have adopted this approach successfully to build confidence in the approach and what it can deliver.

At the end of the course, attendees should understand the vital role of leadership within a Lean Agile organisation to enable a high-performance culture with effective change management, responsiveness to change and a rigorous focus on the critical few priorities.

The training should include:

- Overview of Lean Agile Thinking
- Purpose-driven
- Focus on customer
- Explore versus exploit - incremental versus radical change
- Learning organisations and psychological safety
- Leadership and empowerment
- Incremental improvement using DMAIC

- Breakthrough thinking, deploying strategy, and responding to change (use of objectives and key results (OKRs))
- Continuous engagement and creating the right environment where workers are inspired, and can thrive and create
- An introduction to Lean Management Systems
- Sponsoring initiatives and measuring outcomes:
- Lean Systems Thinking
- Linking initiatives to the strategy and measuring success (Business Model Canvas, Value Streams, Strategy Map, Balanced Scorecard, OKRs)

Leaders should leave the training with confidence to understand the language, philosophy and power of a Lean Agile culture and their vital role in making it a success. The trainer(s) must have a strong track record in Lean Agile practice, and preferably expertise of working in a scientific, technology based public sector environment.

#### Overview of Agile Methods for effective and efficient project delivery - training

Some STFC teams (c. 20 people) are trialling the delivery of projects using an agile approach and STFC would like to provide these teams with an overview of the use of Agile project management techniques to ensure pragmatic execution of projects with an appropriate sense of urgency (e.g. Kanban and/or Scrum).

This course should be a 1–2-day overview, with ICAgile Agile Fundamentals certification for each delegate on completion.

#### Overview of Agile Methods for effective and efficient project delivery - coaching

In the past, STFC have found a training intervention alone does not necessarily allow teams to get up and running with agile ways of working, particularly when deployed on atypical Agile projects (e.g., hardware delivery). From previous experience, successful teams have benefitted from coaching from trained and experienced agile scrum masters. Coaching should be tailored to the requirements of the teams, but should typically include:

- Introduction of ceremonies, with the coach initially taking on the scrum master role
- Individual coaching for the team scrum master and product owner, ensuring the team is well-supported once coaching support ends.
- Team working agreements and health checks, ensuring teams are working on the right things, as decided by the team
- Support for team members leading experiments with ways of working.
- Definition of and collection of metrics such that the coaching intervention is proven to be a success.

Expertise in agile coaching in science and technology in the public sector will be beneficial.

The level of coaching support required will vary depending on the maturity of the team and the level of intervention needed, to be determined by the coach and the team once the contract has been awarded. However, it should be costed based on 40 days support per team, across 3 teams (120 days total). The 40 days would be deployed over the course of a minimum 6-month period, allowing the team time to adapt to new ways of working, and to evaluate their improvements.

#### Continuous Improvement Lead coaching

Many of our CI leads within departments are not CI specialists, rather they have been deployed from other roles to support the strategic implementation of a CI programme, using their knowledge of the departments and networks to achieve effective change. These staff have the local knowledge to effect change but require support and guidance from experts to effectively realise the ambitions of their staff.



Individual coaching, deployed flexibly based on individual requirements but based on 1h per working week across 5 staff (230 hours total), should cover topics such as:

- How to coach other staff who are delivering or participating in change projects
- Creating departmental CI strategies, delivery plans and effective reporting (light touch governance)
- Stakeholder relationships, particularly senior leadership
- Departmental learning and capability mapping.

#### 5S Workshops and leadership training

5S is a CI methodology that is particularly relevant in STFCs physical workspaces (including labs and cleanrooms). Facilitated support for rapid improvement events is required, followed by ongoing support for the team and leadership to support 'Gemba walks' and 'train the trainer' support to deploy 5S further into the organisation (expected to be 3 days total per team) . It is anticipated that will be three 5S initiative per year, in person at STFCs sites in the UK, 9 days in total. The ideal trainer would have expertise in public sector scientific environments, in addition to relevant industry experience.

#### Coach and trainer requirements

Coaches for yellow-belt, green-belt and CI Lead coaching should be black-belt or master black-belt Lean/Six Sigma.

For other interventions, such as Agile, change management, 5S, etc. should have relevant industry-standard qualifications and expertise in coaching.

Prior work in science and technology in the public sector will be beneficial.

The requirements weighting of individual interventions above is indicative but may change due to changing business needs. Given the short-term in-year nature of CI projects, this coaching resource should be flexible – should the individual or team choose it, some of these hours could be used for the coach to co-design and/or co-facilitate workshops if needed. The successful vendor should work with CI Leads to determine arrangements within the cost envelope.

The preferred accreditation body is the British Quality Foundation (for Lean Six Sigma certification), and ICAgile (for Agile Fundamentals), to ensure continuity and consistency of approach for employees, however, other accreditation bodies will be considered

#### Reporting

- Weekly meetings are required between the contract manager and supplier throughout the contract to effectively design, schedule, deliver, review attendance and evaluate the success of the training and coaching. This will be conducted via videoconference.
- Monitoring of progress of CI projects (YB and GB) following coaching interventions.
- A pre-course review of the material is required for the first edition of each course, with any changes to the content highlighted and agreed before subsequent editions.
- A co-designed post-course questionnaire will be shared with the contract manager and discussed if necessary.
- Financial statements are required each month, including departmental-level reporting.
- Updated training/coaching logs are required as soon as possible after each event.

OFFICIAL – SENSITIVE (COMMERCIAL)

*This form is an expression of interest only to understand if and what solutions are available that will fully meet the contracting authority's needs; the full details of the project and the desired outcomes will be provided should a future tender be advertised. At this stage there is no commitment that a tender exercise will follow.*

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## Procurement Plan / Dates and Budget

**Project budget and duration**– The initial contract value is £300,000.00 for year one with scope to extend yearly for a further 3 years. The total contract value shall not exceed £1,200,000.00

**Indicative Contract start date** – April 2025.

## Validation Questions

To ensure that this procurement maximises appropriate bidder responses we have the following questions that we would like to pose to interested suppliers:

1. **Supplier Capability** – Please can you confirm if this project is something that your organisation would have the capability to undertake?
2. **Procurement Timescales** – Based on the indicative timescales for advertising this procurement, would your organisation have capacity to provide a tender response? If your response would be 'No', we would be grateful for any further relevant details on why you would not have capacity to respond based on the timescales advised.
3. **Project Scope** – Based on the procurement scope provided, please can you advise if there is any further information that you would require to be able to support a bid response?
4. **Suggested Approach / Methodology** – As part of the response to the formal tender for this requirement, we will be asking bidders to advise on their chosen Methodology / Approach to undertaking these Services. Please can you advise if at this stage you believe you would recommend an alternative approach, or if the approach detailed is likely to be the most suitable?
5. **Viability of Scope and Contract Terms** – Please can you advise if the timescales detailed in the scope appear viable, in line with the proposed Contract term?

## Response from Supplier:

*Based on the project detail provided, is it your intention to respond to the Further Competition documentation once issued?*

Yes / No

### Response to validation Questions

1. **Supplier Capability** –
2. **Procurement Timescales** –
3. **Project Scope** –
4. **Suggested Approach / Methodology** –
5. **Viability of Scope and Contract Term** –

Any further comments

Name



Email:	
Organisation:	