

**Advice Skills Academy**

**Training delivery Tender Brief & Response**

Guidance and Tender document

Deadline for responses: 12.00 noon Friday 10 August 2018

**Part A: Guidance**

**1. Introduction**

We are seeking to procure a suitable provider or providers of training for a calendar of training for the Advice Skills Academy between October 2018 to April 2019 up to a total value of £10K.

The Advice Skills Academy (ASA) is a European Social Fund (ESF) funded project, funded October 2016 to September 2019 (subject to change control approval), which will develop a co-ordinated approach to identifying learning and development needs of staff within local Citizens Advice services and other partners in the Liverpool City Region (LCR). The project will: develop a calendar of training opportunities to meet the needs of staff, including internal Citizens Advice delivery, and externally procured delivery; identify other learning and development opportunities, including e-learning, coaching and mentoring; and support the development of learning organisations that are responsive to the needs of staff, volunteers, and their learning, development and progression goals.

The project has been developed to:

* Address higher level skills shortages in specialist advice services
* Provide training and support for people within the workforce to improve skills, knowledge, progression and productivity
* Provide a training and support route for disadvantaged groups seeking to access further job opportunities in the sector
* Improve management, leadership and progression capacity
* Promote equality by improving the progression prospects of women within the workforce

The project partners are:

Citizens Advice East Liverpool; Citizens Advice Halton; Citizens Advice Knowsley; Citizens Advice St Helens; Citizens Advice Sefton; Citizens Advice South Liverpool; and The Women’s Organisation.

The Women’s Organisation is the accountable body for this Programme. All correspondence in relation to this process will be with and through the Women’s Organisation.

**2. Procurement Process and Timetable**

This Tender is provided on the same basis to all Suppliers who are on the Advice Skills Academy Preferred Suppliers List.

This Tender takes the form of a Single Stage Tender and all interested suppliers on the Preferred Suppliers List are invited to tender.

Tenders may be for one Lot, a combination of Lots, or all Lots in the brief.

Set out below is the proposed procurement timetable. This timetable is intended as a guide and, whilst The Women’s Organisation does not intend to depart from the timetable, it reserves the right to do so at any time.

|  |  |
| --- | --- |
| **Procurement Stage** | **Indicative Date** |
| Contract Notice published | Friday 20 July 2018 |
| **Deadline for Tender Submissions**  (at The Women’s Organisation, Liverpool) | 12.00 noon 10 August 2018 |
| Contracts awarded and signed | 10 September 2018 |
| Commencement | End September 2018 |

No information contained in this Tender or in any communication made between The Women’s Organisation and any Supplier in connection with this Tender exercise, shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this Tender. The Women’s Organisation reserves the right to cancel the process at any time.

Under no circumstances shall The Women’s Organisation incur any liability in respect of this Tender or any supporting documentation. The Women’s Organisation will not reimburse the costs incurred by Suppliers in connection with the preparation and submission of their response to this Tender.

The Tenders are to be evaluated against the following pre-determined award criteria and the contract will be awarded on the basis of the most economically advantageous tender.

|  |  |
| --- | --- |
| **Evaluation Factor** | **Weighting** |
| Price | 30% Price weighting |
| Quality | 70% Quality weighting |

**2.1 Procurement Queries and Submission of Tender**

The Women’s Organisation named point of contact for the procurement of this contract is Laura Anderson. All requests for further information in respect of the contract and the submission of completed tenders should be sent using the contact details below by the stated deadlines.

By e-mail to: [info@thewo.org.uk](mailto:info@thewo.org.uk)

Subject: FAO Laura Anderson, Advice Skills Academy Training Delivery Tender

By post to: Laura Anderson, The Women’s Organisation, 54 St James Street, Liverpool, L1 0AB.

Responsibility for ensuring that the tender is received by The Women’s Organisation lies with the applicant. Completed Tender documents may be submitted at any time before the closing date. Please note that completed Tenders received after the closing date may be rejected.

**3. Proposal Requirements**

The delivery of training in the following areas is required, during October 2018 to June 2019:

**Lot a) Managing stressful advice workloads**

Aimed at busy advisers, this session should equip advisers with the tools, techniques and skills to cope with stressful and demanding workloads, using tools and techniques for identifying what stress is, how to deal with stress, dealing with targets and heavy workloads, so they can stay focused. Tailored for the advice sector, with an understanding of how advice caseloads work in practice, this session should be specific to advisers, rather than a generic stress or time management session, and should include tools and techniques for prioritising work.

1 day session – delivered several times between October 2018 to April 2019

**Lot b) Employment Law Advice – Moving from generalist to caseworker level**

Aimed at advisers with some knowledge of Employment Law (generalist level), this session should enable advisers to move towards caseworker level, and should include things like: preparing cases for tribunal; settlement agreements; valuing tribunal claims; and casework management for Employment Law.

1 day session – delivered once

**Lot c) Immigration Advice – Right to reside, habitual residence, and entitlement to benefits for EEA and non-EEA nationals**

For advisers who have a generalist knowledge of immigration advice, this session should provide an overview of right to reside and habitual residence tests for EEA and non-EEA nationals. The session should then go into more detail covering the options available to EEA and non-EEA nationals, including the main residence rights of EEA nationals, who can acquire a permanent right of residence, and for non-EEA nationals, changes to immigration status, and benefit entitlements of a partner or child with a different immigration status.

1 day session – delivered once

**Lot d) Mental Health Awareness**

For frontline staff, including advisers, this session should provide an understanding of different types and levels of mental health issues; the ways these issues can impact on the needs of clients of advice organisations; where to signpost people to for support on mental health issues; and some tips for how to keep a client with mental health issues engaged in the advice process.

1 day session – delivered several times between October 2018 to April 2019

**Training session arrangements**

All sessions will be delivered in a central location in Liverpool, to enable participants from across the Liverpool City Region to travel to sessions either by public transport or car, and ASA will manage the booking of venues, and participant bookings. ASA will ensure that the chosen venue is accessible, and has suitable facilities including:

* Projector/screen
* Where possible - wi-fi access
* Flipchart
* Refreshments (N.B. lunches will not be supplied)
* Close proximity to lunch facilities
* Close proximity to parking and public transport facilities

It is envisaged that the sessions (for a full day delivery) will start no earlier than 9.45am, and finish around 4.00pm (or earlier dependent on session content / delivery requirements).

**Delivery – other requirements**

As a European funded project, the Advice Skills Academy is required to comply with ESF requirements, including (but not limited to):

* The use of the official ESF logo on all internal and external documents;
* The notification (including verbally) to all participants attending activities that the project is supported by ESF;
* The collection of participants data, through attendance sheets, and monitoring and evaluation processes; and
* Ensuring that disadvantaged groups, including people who are 50 and over, BME people, disabled people, and women can access and benefit from the project.

Due to the compliance requirements for ESF funding, the ASA project will expect that suppliers will comply with requirements to use the ASA project and ESF logo (where this is appropriate, or where there is an absolute requirement, and ASA can advise on such), and will ensure that attendance sheets and monitoring and feedback forms are completed at sessions, and original copies returned to the project team.

**4. Selection, Award and Scoring**

**Selection Criteria**

Quality: What is your experience of delivering the contract brief, and what is your experience of a specific subject within it?

In particular, you may wish to consider:

* Describing your experience of training development and delivery
* Your experience of delivery in the specific subject areas – how long have you been delivering, who to, and at what level(s)
* Examples of feedback on contract delivery relating to some or all of the subject areas
* An outline of the relevant contract management and delivery staff and their relevant qualifications
* How you have successfully developed sessions to engage with participants with differing levels of knowledge, different learning styles, and different cultural backgrounds

**Award Criteria**

Most economically advantageous

Price 30%

Quality How would you deliver the brief? Added value? 70%

**Scoring**

Evaluation criteria will be based on a scoring of 0 – 10, the details of which are

|  |  |
| --- | --- |
| Score | Classification |
| 9-10 | Exceptional, Excellent response to the requirement good range of examples, highly relevant to the contract requirements |
| 7-8 | Above expectations, Good response to requirement and good range of examples provided |
| 5-6 | Meets expectations, Average response to requirement and reasonable range of examples provided |
| 3-4 | Below expectations, Poor response to requirement and few examples provided |
| 1-2 | Well below expectations, Poor response to requirement and no examples provided |
| 0 | Unacceptable, No response to the requirement was provided |

*Proposed Delivery:*

**1** Please provide details of your expertise and experience, including of previous contracts, relevant to this tender for each of the ‘Lots’ you are tendering for (10%)

You may wish to consider:

* Demonstrating advice specific knowledge and expertise, for the delivery of any advice specific session you are tendering for (if relevant) i.e. ‘Lots’ **a**, **b, c**
* How non-advice specific subjects can be delivered to maximise usefulness in support and advice giving roles

**2.1** Please provide details of your methodology /approach to the task as described in the Brief (40%)

You may wish to consider:

* How you will incorporate interactive methods of delivery to help engage diverse learners
* How you might provide tools and techniques that participants can use after the session
* A key aim of the Advice Skills Academy is to make the purchase of training cost-effective, not just in price, but also content and quality, as advisers with demanding caseloads find it very difficult to take a day out from advice delivery to attend training

**2.2** Please provide a brief summary of session aims and objectives, a proposed session title, and overview of session content, for each of the lots you are tendering for (10%)

**2.3** Please describe your approach to diversity and cultural understanding in the delivery of this contract (10%)

You may wish to consider:

* How your material / session content reflects diversity, in the use of case studies, and scenarios
* The accessibility of your methods and learning materials in respect of age, gender, ethnicity, language, sexuality, disability, class and cultural background

**2.4** What is your readiness to commence delivery upon notification of a successful bid? (Not scored)

**3** Please state your price structure as a day rate and terms – score of 30%, with lowest day rate cost scoring 30% and score reducing by pro-rata with price increase

You may wish to consider:

* As a consortium of charities, Citizens Advice organisations in the Advice Skills Academy are committed to reasonable pricing that represents value for money
* The Advice Skills Academy is funded through public funds, and must demonstrate accountability for expenditure

Worked example

*How Quality score will be used to give a weighted score*

* Technical Question 1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 6 | 10% | 1 | 6 |
| B | 8 | 10% | 1 | 8 |

* Technical Question 2.1

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 7 | 30% | 3 | 21 |
| B | 7 | 30% | 3 | 21 |

* Technical Question 2.2

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 5 | 10% | 1 | 5 |
| B | 6 | 10% | 1 | 6 |

* Technical Question 2.3

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| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 8 | 10% | 1 | 8 |
| B | 7 | 10% | 1 | 7 |

*How Price will be used to calculate a score*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Score out of 10** | **Weighting** | **Weighting Multiplier** | **Weighted Score** |
| A | 7 | 30% | 3 | 21 |
| B | 6 | 30% | 3 | 18 |

*Worked example of Overall Result*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier** | **Quality Score** | **Price Score** | **Total Score** | **Ranked Position** |
| A | 40 | 21 | 61 | 1 |
| B | 42 | 18 | 60 | 2 |

Threshold: Any applicant with an overall score of less than 60% will not be considered for contracting.

Ranking: Applicants will be ranked and offered contracts in ranked order (above threshold) based upon budget availability.

**Part B - Response to Tender**

**Section 1 Overview**

|  |  |  |
| --- | --- | --- |
| 1 | **Organisation / Consultant’s Details** | |
| **1.1** | Legal name of organisation |  |
| **1.2** | Trading name of organisation: (if different from the above) |  |
| **1.3** | Main function of organisation  (SIC code, if known) |  |
| **1.4** | Contact name: |  |
| **1.5** | Job Title: |  |
| **1.6** | Registered Legal Address: |  |
| **1.7** | Primary Correspondence Address (if different from above):  Post Code: |  |
| **1.8** | Telephone number: |  |
| **1.9** | E-mail address: |  |
| **1.10** | Website address (if any): |  |
| **1.11** | Company Registration number (if this applies): |  |
| **1.12** | Charities or Housing Association or other Registration number (if this applies). Please specify registering body: |  |
| **1.13** | Date of Registration: (if this applies) |  |
| **1.14** | Are you registered for VAT?  If “YES” please provide Registration number |  |
| **1.15** | Is your organisation: | (please indicate by ticking the appropriate box) |
|  | a public limited company? |  |
| a private limited company? |  |
| a company limited by guarantee |  |
| CIC |  |
| a limited liability partnership (LLP)? |  |
| Statutory Corporation? e.g. Further Education College |  |
| Sole Trader |  |
| Other (please specify the legal status of your organisation)? |  |
| **1.16** | Is your organisation part of a group of companies? If “YES” please give details below. |  |
| **1.17** | Name of (ultimate) parent company  (if this applies): |  |
| **1.18** | Companies House registration number of parent company (if this applies): |  |
|  | | |

**Section 2 – Due diligence**

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| **2** | **Financial Information** | | | |
| 2.1 | Can you provide evidence of financial stability by submitting one of the following:  A copy of your accounts for the most recent **three** years  Or  An up to date set of management information (including turnover, profit & loss account and cash flow) covering the period from the last set of audited accounts to date or business startup. | |  | |
|  | |
| 2.2 | Has your organisation had any CCJs issued against it within the last 3 years? | |  | |
| 2.3 | Please indicate the size category of your organisation  Micro (1 – 9 employees)  Small (10 – 49 employees)  Medium (50 – 249 employees)  Large (250+ employees) | |  | |
|  | | | | |
| 3 | **Insurance** | | | |
| 3.1 | Please confirm the insurances (and indicate level) that you hold | | | |
|  | Employer’s Liability (required): |  | | |
|  | Professional Indemnity (required) : |  | | |
|  | Other (Specify): |  | | |
| 3.2 | Would you be able to increase level or type of insurances as required for this contract? |  | | |
|  | | | | |
| 4 | **Competencies** | | | |
| 4.1 | Does your organisation hold evidence of professional qualifications of its staff that it is prepared to submit for verification on request? | | |  |
| 4.2 | Does your organisation actively encourage CPD for staff and have an auditable record of staff development? | | |  |
|  | | | | |
| 5 | **Health and Safety** | | | |
| 5.1 | Does your organisation have a written health and safety policy that demonstrates your compliance with Health and Safety legislation? | | |  |
| 5.2 | When were your Health and Safety procedures last audited and / or reviewed and updated? | | |  |
| 5.3 | In the past 5 years has your organisation ever been prosecuted under health & safety legislation or been served prohibition or improvement notices by an Enforcing Authority such as the Health & Safety Executive?  If “YES” please provide evidence of the issues and how they have been resolved in practice to the satisfaction of H&S Executive | | |  |
| 5.4 | Do you have auditable systems in place to undertake and / or monitor risk assessments at employer locations | | |  |
| 5.5 | Does your health and safety policy make reference to and arrangements for participants / learners? | | |  |
| 5.6 | Please name and state the position of the person who will have responsibility for the health and safety of clients. | | |  |
|  | | | | |
| 6 | **Equality and Diversity** | | | |
| 6.1 | Do you collect and monitor equality and diversity data relating to your organisation and the services it provides, including that on ethnicity, gender and disability? | | |  |
| 6.2 | Where relevant, do you monitor participation and success rates of learners by ethnic origin, gender and disability? | | |  |
| 6.3 | Do you produce an action plan with targets based on the analysis of the equality data collected and review progress regularly? | | |  |
| 6.4 | In the last three years has any finding of unlawful discrimination been made against your organisation by any court or industrial or employment tribunal or equivalent body? | | |  |
| If “YES”, what steps did your organisation take as a result of that finding? | | | | |
| 6.5 | Do you undertake, in the delivery of services to actively promote good practice in terms of ensuring equality and eliminating discrimination in all forms through, as a minimum: | | | |
| a | The implementation of an organisational Equality and Diversity policy? | | |  |
| b | Providing relevant examples of the instructions, documents, recruitment advertisements or other literature with concern to the delivery of the contracted services when requested? | | |  |
| c | Issuing appropriate messages to participants / learners concerning recruitment onto provision and / or training progression? | | |  |
| 6.6 | Do you ensure that all staff in your organisation undertakes training so that they are aware of their responsibilities under your Equality & Diversity policy and the Equality Act 2010? | | |  |
|  | | | | |
| **7** | **Professional and Business Standing** | | | |
| 7.1 | Has your organisation ever been removed from a contract prior to its intended close date for failure to meet minimum levels of performance or for any other reason?  If you answer YES please give detailed explanation | | |  |
| 7.2 | Do any of the following apply to your organisation, or to (any of) the director(s) / partners / proprietor(s) or any other person with powers of representation? | | |  |
| i | A conviction (or convictions ) for a criminal offence related to business or professional conduct | | |  |
| ii | In a state of insolvency, voluntary administration, compulsory winding up, receivership, composition with creditors, company voluntary arrangements or subject to equivalent proceedings? | | |  |
| iii | Failure to fulfil obligations related to the payment of taxes | | |  |
| iv | Failure to fulfil obligations related to the payment of social security contributions? | | |  |
| v | Legal or administrative finding of commission of an act of grave misconduct in the course of business | | |  |
| vi | Failure to provide information required or providing inaccurate/misleading information when participating in a procurement exercise | | |  |
| vii | Failure to obtain and maintain relevant licences or membership of an appropriate trading or professional organisation where required by law | | |  |

**Section 3 – proposed delivery**

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| --- | --- |
| **Name of organisation:** |  |

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| --- | --- | --- |
| **1** | **Please indicate which subject areas you are interested in tendering for delivery of (‘Lots’):** | ✓ |
| **Lot a** | Managing stressful advice workloads |  |
| **Lot b** | Employment Law Advice - Moving from generalist to caseworker level |  |
| **Lot c** | Immigration Advice – Right to reside, habitual residence, and entitlement to benefits for EEA and non-EEA nationals |  |
| **Lot d** | Mental Health Awareness |  |

|  |  |
| --- | --- |
| **1** | **Please provide details of your expertise and experience, including of previous contracts, relevant to this tender for each of the ‘Lots’ you are tendering for – Score 10%** |
|  |  |
| **2.1** **Please provide details of your methodology / approach to the task as described in the Brief – Score 40%** | |
|  | |
| **2.2 Please provide a summary of session aims and objectives, a proposed session title, and brief overview of session content, for each of the Lots you are tendering for. Score – 10%** | |
|  | |
| **2.3 Please describe your approach to diversity, gender and cultural understanding specifically in the delivery of this contract. Score – 10%** | |
|  | |
| **2.4 What is your readiness to commence delivery upon notification of a successful bid? (Not scored)** | |
|  | |
| **3** | **Please state your price structure and terms, including a day rate (Score 30%)**  Please note:   * All prices quoted shall be fixed and firm and shall apply for the full duration of the contract. * Following that period, any requests for price changes must be accompanied by a written summary and supported by evidence to justify the proposed price change. * No quantity or continuity of work is guaranteed to successful suppliers and this should be taken into account when completing the Pricing Schedule. * All prices quoted shall be exclusive of Value Added Tax (VAT). * The daily rate is for an 8 hour working day, during a normal working week (Monday to Friday). A half day is therefore considered as 4hrs. * All costs are deemed to include expenses and any other on-cost. |
|  |  |

Signed:

Signed ………………………………………………………

Name (please print) ………………………………………..

Position in organisation ………………………………………………………..

Date: ……………………………………………….

Deadline for completed applications is: 12.00 noon, Friday 10 August 2018