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**1. PURPOSE**

- 1.1 To develop and deliver 8, half day workshops for teams across the Financial Services Group (about 120 staff approx.), and to help to enhance and build relationships using the Myers Briggs Type Indicator® (MBTI).

**2. BACKGROUND TO THE CONTRACTING AUTHORITY**

- 2.1 The Financial Services Group promotes a stable and efficient financial services sector that supports growth in the UK economy and promotes good outcomes for consumers and businesses, by:
  - 2.1.1 Promoting growth in the UK economy across all sectors and regions by ensuring financial services operate efficiently and competitively.
  - 2.1.2 Supporting macroeconomic stability by ensuring that UK, EU and international regulation reduces risk of financial and wider macroeconomic instability.
  - 2.1.3 Prioritising good outcomes for consumers and businesses through appropriate regulatory reform, effective competition and better informed consumers.
  - 2.1.4 The Group currently has a staffing level of about 120 and is a mix of senior civil servants, policy officials and administrative professionals, and the team sizes range from 8-21 per team.

**3. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**

- 3.1 With the frequency of change, the Directors' considered that is a good opportunity to get an overview of the personality types within the Group, and how types interact with each other in challenging times.

**4. DEFINITIONS**

Expression or Acronym	Definition
MBTI	Myers Briggs Type Indicator

**5. SCOPE OF REQUIREMENT**

- 5.1 The following aspects will need to be provided as part of this requirement:
  - 5.1.1 Pre meeting with contract manager to outline the learning outcomes;
  - 5.1.2 Provide and interpret overview of MBTI and analysis of the interpretation, individual report per person in advance of the workshops being delivered;
  - 5.1.3 Deliver a series of team based workshops (team sizes vary from 8-21) that illustrates differences and helps enhance better ways of working,
  - 5.1.4 Feedback evaluation and wrap up meeting with contractor and their representative.
  - 5.1.5 It is desirable, but not essential that there is a one to one feedback session with each team member.



5.2 The following is out of scope: The venue

5.2.1 The Authority will take responsibility for sourcing the venue for these workshops, which is likely to be at our premises, 1 Horse Guards Road, SW1A. This is subject to their booking capacity. In the event that this cannot be sourced at our premises we will source a venue in the central London area.

## 6. THE REQUIREMENT

6.1 To develop and deliver 8, half day workshops for teams across the Financial Services Group (about 120 approx.), to help to enhance and build relationships using the Myers Briggs Type Indicator® (MBTI). A questionnaire will be sent out in advance to each team member to complete ahead of the scheduled workshop.

The workshop aims to introduce participants to the MBTI diagnostic tool, context setting, and the dichotomies, and:

6.1.1 Provide an opportunity to experiential exploration of the diagnostic, and to help participants see how the different preferences play out in practice, focusing particularly on the function pairs and to consider what implications this has for their contribution within the team setting;

6.1.2 To provide an awareness of self and others to aid effective team working, and approaches to change and decision making;

6.1.3 To provide team based exercises that illustrates the differences, understanding the tensions between different types and to help enhance better ways of working.

## 7. KEY MILESTONES

7.1 The supplier will need to deliver the majority of the workshops early September 2017; and be flexible to deliver beyond the contingency dates if teams are unable to meet that time frame because of pressing work priorities.

7.2 The Potential Provider should note the following project milestones that the Authority will measure the quality of delivery against:

Milestone	Description	Timeframe
1	Meet with contract Manager	Within week 1 of Contract Award
2	Send out MBTI instrument to participants and prepare diagnostic report ahead of the scheduled workshop	Within week 4 – 7 weeks of Contract Award
3	Four out of the 8 workshops should have been delivered by end of September	By end of September 2017

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4	Any remaining workshops and any mop up workshops should have been delivered	By end October 2017
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**8. AUTHORITY’S RESPONSIBILITIES**

8.1 The Authority will provide the contact details for the teams and staff names; and provide the venue for these workshops.

**9. REPORTING**

9.1 The Supplier will be expected to provide a written evaluation of the overall outputs after the delivery of the workshops.

**10. VOLUMES**

10.1 120 personnel; interpretation of MBTI booklets for each individual.

**11. CONTINUOUS IMPROVEMENT**

- 11.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 11.2 The Supplier should present new ways of working to the Authority during monthly Contract review meetings.
- 11.3 Changes to the way in which the Services are to be delivered must be brought to the Authority’s attention and agreed prior to any changes being implemented.

**12. QUALITY**

12.1 Facilitator will need to be MBTI® accredited and experience with working with diverse groups.

**13. PRICE**

- 13.1 The maximum budget for this training is £26,000 (excluding VAT) to include the delivery of the planned workshops and the materials and pre and post evaluation, and debrief to contract manager/Directors’ on emerging themes. The Potential Supplier must provide a cost estimate for their proposed work broken down by method, any bid over £26,000 (excluding VAT) will be deemed non-compliant and will not be evaluated.
- 13.2 Prices (excluding VAT) are to be submitted via the e-Sourcing Suite using Appendix E – Pricing Schedule.

**14. STAFF AND CUSTOMER SERVICE**

- 14.1 The Authority requires the Potential Provider to provide a sufficient level of resource throughout the duration of the Building Effective Teams using MBTI Contract in order to consistently deliver a quality service to all Parties.
- 14.2 Potential Provider’s staff assigned to the Building Effective Teams using MBTI Contract shall have the relevant qualifications and experience to deliver the Contract.
- 14.3 The Potential Provider shall ensure that staff understand the Authority’s vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.



**15. SERVICE LEVELS AND PERFORMANCE**

15.1 The Authority will measure the quality of the Supplier’s delivery by:

KPI/SLA	Service Area	KPI/SLA description	Target
#1	Delivery	Deliver 50% of the training courses by 25 September 2017	25 September 2017
#2	Delivery	Deliver 50% of the team workshops by 26 October for the agreed 130 delegates	26 October 2017

**16. SECURITY REQUIREMENTS**

16.1 Potential Providers must demonstrate they have appropriate IT, physical, personnel and procedural security measures in place to prevent any unauthorised access to, or leakage of, data collected as part of this contract, and to prevent it being shared with any unauthorised third parties.

16.2 IT Security

16.2.1 Any IT systems used by the supplier to meet the Authority’s requirement (including any web portal) must comply with the technical requirements prescribed by “Cyber Essentials”. This can either be through the Potential Provider having a current and valid cyber essentials certificate awarded by one of the government approved Cyber Essentials accreditation bodies within the last 12 months (see: <https://www.gov.uk/government/publications/cyber-essentials-scheme-overview>) or by being able to explain in detail how they comply with the relevant technical requirements of Cyber Essentials, which can be found here:

<https://www.cyberstreetwise.com/cyberessentials/files/requirements.pdf>

16.2.2 The method used by Authority staff to submit information (e.g. Myers Briggs-related information) to a supplier web portal must be encrypted and appropriately secure. Similarly, any reports containing personal information which the supplier provides to Authority staff must also be encrypted and appropriately secure whether provided by a web portal of via email. The method of encryption used must be agreed with the Authority.

16.3 Physical Security

16.3.1 Potential Providers are expected to have appropriate physical security measures in place in any data centres, or other buildings, used to host the Authority’s data.



16.4 Personnel Security

16.4.1 Any pre-employment checks that the Supplier subjects their staff to should be at least equivalent to the [Government Baseline Personnel Security Standard](#).

16.4.2 Compliance with the [Data Protection Act \(DPA\) 1998](#) is essential, with the Authority being the Data Controller and the Supplier being the Data Processor. The Authority's preference is that the Supplier would be able to host the data entirely within the UK, and supported entirely by UK based system admin staff, but would consider hosting with the European Economic Area (EEA) as long as the Potential Providers are able to provide assurances that all other security requirements can be met, and subject to compliance with the Data Protection Act.

**17. PAYMENT**

17.1 Payment will be made at the end of the workshops being delivered.

17.2 Payment can only be made following satisfactory delivery of pre-agreed certified products and deliverables.

17.3 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.

**18. LOCATION**

18.1 The location of the Services will be carried out in the London area as set out at 5.2.