

26 August 2019

The Wise Group
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Invitation to Tender for Services

This document is an invitation to tender ("**ITT**") relating to the appointment of a service provider for the Programme (as defined in the ITT). The ITT sets out the guidelines which all tenders must adhere to, and The Wise Group's requirements for the Services. The ITT also sets out The Wise Group's specific tender requirements in order to assist suppliers in preparing and submitting their tender response.

Contact details for The Wise Group are set out in the ITT should any additional information be required.

We look forward to your response by reply.

The Wise Group



Invitation to tender for Counselling Services

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This ITT is dated 26 August 2019

NAME OF COMPANY: The Wise Group ("**The Wise Group**")

TENDER FOR: Wise Steps – Counselling Services (the "**Services**")

1. INTRODUCTION AND BACKGROUND

1.1 ITT Process

The Wise Group is issuing this invitation to tender ("**ITT**") to suppliers in connection with the procurement of the Services more fully described in the specification set out in Part 1 of the Schedule to this ITT. **This ITT does not constitute an offer capable of acceptance to form a contract.**

Each tender ("**Tender**") submitted by each supplier ("**Tenderer**") who responds to this ITT should be detailed enough to allow The Wise Group to make an informed selection of the most appropriate provider. This ITT contains information about the procurement process and the Services, as well as assessment questions for Tenderers to complete as part of the Tender.

Subject to the terms of this ITT, The Wise Group proposes to enter into a contract ("**Contract**") with the successful Tenderer (to be subsequently named in the Contract as the "**Service Provider**").

This ITT has been issued by The Wise Group to fulfil its requirements. A number of terms are used in this ITT which are specific to The Wise Group and the Services. These are explained in the glossary in Part 2 of the Schedule to this ITT.

Subject to the Contract, all communications in relation to this ITT are invitations to treat, and no contract is made until The Wise Group's formal acceptance has been issued to the successful Tenderer. This formal acceptance will be in the form of a signed letter from a named person of The Wise Group's choosing after the completion of the tender process.

1.2 Introduction to The Wise Group

The Wise Group has been transforming lives through social enterprise in the North East of England and Scotland since 1983. We make a positive difference to people, communities and society by helping our customers gain new skills and employment, reducing re-offending, regenerating communities and tackling fuel poverty. We have a clear understanding of the type of support our customers need and have a proven track record of providing both innovative and high quality services. The Wise Group delivers results by working closely with stakeholders which include Government, local authorities, other social enterprises and private businesses.

Our Mission: An inspiring social enterprise that makes a difference to people, communities and society.

Our Vision: To realise people's potential, create a fairer society and contribute to sustainable economic growth.

1.3 Introduction to the Programme

Wise Steps is part of the Building Better Opportunities programme across England, funded by the European Social Fund and the National Lottery Community Fund. The Wise Group delivers employment services to help people across Tyne and Wear who are furthest from the labour market and who face multiple barriers to work, by supporting them to access employment and work experience opportunities, achieve qualifications and improve their general wellbeing and life chances.

Unlike other employment services, Wise Steps focuses on the customer at its core and takes a holistic approach to helping people find their way into work, ensuring that every person who enters the programme is given the care and attention they need. Understanding that every person who joins the programme is unique and has a different set of challenges ahead of them, allows Wise Steps to gain an understanding of how they can help each person find sustained employment and remove any issues that block their entry to work. By assessing each person's needs and how they are impacted by the barriers they face, we are able to make Wise Steps work for them by providing tailored support to address those key barriers, while also helping to tackle financial and digital inclusion (both areas of high concern in Tyne and Wear).

The Wise Group delivers the programme with a diverse partnership of over 25 regional organisations, including specialists with expertise in assisting individuals within their local communities and providing support in relation to specific barriers to work. Wise Steps first commenced delivery in 2016 for an initial three year period, and was recently extended by the National Lottery Community Fund up until March 2022.

1.4 Counselling Services

The objective and scope of this ITT is to find a provider of the Services, at the request of The Wise Group in connection with the Programme.

Further details of The Wise Group's expectations in respect of the Services are set out in Part 1 of the Schedule (Specification of Services) of this ITT.

1.5 Contract Term

The Wise Group proposes to enter into one Contract with the successful Tenderer (who will become known as the Service Provider upon formation of the Contract), commencing as soon as possible and continuing until 31 December 2021.

1.6 Purpose and scope of this ITT

This ITT:

- (a)** asks prospective Tenderers to submit their Tenders in accordance with the instructions set out in the remainder of this ITT;
- (b)** sets out the overall timetable and process for the procurement to prospective Tenderers;
- (c)** provides prospective Tenderers with sufficient information to enable them to provide a compliant Tender;
- (d)** sets out the evaluation criteria that will be used by The Wise Group to evaluate the Tenders; and
- (e)** explains the administrative arrangements for the receipt of Tenders.

1.7 Clarifications about the Services or ITT

Regarding any requests for clarification:

- (a)** any enquiries or requests for clarification of any matters arising from this ITT should be sought from The Wise Group's Procurement team (who may refer/escalate such enquiries or requests to the Wise Steps team where necessary), and must be made in writing by email to the following address: procurement@thewisegroup.co.uk
- (b)** the deadline for receipt of clarifications relating to the Services or this ITT is set out in the timetable at Clause 2.1 below (the "**Tender Timetable**"), which contains all key dates for this procurement; and
- (c)** The Wise Group will respond to all reasonable requests for clarification as soon as possible by issuing a document by email to each prospective Tenderer listing their questions (which should be contained clearly in any communication with The Wise Group). In addition, to the extent relevant to the other Tenderers, The Wise Group's individual response to any Tenderer will be emailed to all Tenderers. If a Tenderer wishes The Wise Group to treat any request for clarification as confidential, and not issue the individual response to all Tenderers, it must clearly state this when submitting the relevant request for clarification. If, in the opinion of The Wise Group, the request for clarification is not confidential, The Wise Group will inform the

Tenderer as soon as reasonably possible and it will have an opportunity to withdraw it. If the request for clarification is not subsequently withdrawn by a Tenderer, the response (to the extent relevant to the other Tenderers) will be issued to all Tenderers without revealing the identity of the Tenderer requesting confidentiality. Any communication of a clarification by The Wise Group to all Tenderers, assuming the clarification has not been withdrawn by any Tenderer, will be at the sole discretion of The Wise Group.

1.8 Clarifications about the contents of the Tenders

The Wise Group reserves the right (but shall not be obliged) to seek clarification from a Tenderer of any aspect of any Tender during the Evaluation Period. Tenderers are asked to respond to any such requests promptly, without undue delay and to avoid giving vague or ambiguous answers.

2. TENDER TIMETABLE AND PROCESS

2.1 Tender Timetable and Key Dates

2.1.1 Tender Timetable

Stage 1: The Wise Group will publish the ITT on **Monday 26 August 2019**.

Stage 2: The supplier (who will become a Tenderer) shall have until the **Tender Deadline** (being **5pm on Friday 6 September 2019**) to submit a Tender to The Wise Group. All responses to this ITT must be sent to The Wise Group using the email address and in the manner prescribed in Clause 3. Any Tender received after the Tender Deadline shall not be opened or considered by The Wise Group. The Wise Group may, however, in its own absolute discretion, extend the Tender Deadline and in these circumstances The Wise Group will notify all relevant Tenderers of any subsequent change.

Stage 3: Upon receipt by The Wise Group of a request for clarification from a Tenderer pursuant to Clauses 1.7 and 1.8 of this ITT, a response should be given by The Wise Group within a reasonable time, but no later than **48 Business Hours** from receipt of the initial request for clarification. An initial email will be sent by The Wise Group to the relevant Tenderer to acknowledge receipt of their request for clarification, and to advise the Tenderer of the applicable timescales for subsequent responses. If The Wise Group requires additional time to clarify any request, this should be indicated to the relevant Tenderer as soon as possible, but no later than **48 Business Hours** following receipt of the initial request for clarification.

Stage 4: The **Evaluation Period** shall take place in the four (4) Business Days following the Tender Deadline, but may be extended at the sole discretion of The Wise Group.

Stage 5: The Wise Group will shortlist a number of Tenderers for a final interview meeting. The Wise Group will notify all Tenderers of the outcome of all Tenders as soon as possible but by no later than **Friday 13 September 2019**. This period may be extended in the event that additional time is required The Wise Group.

Stage 6: The Wise Group will invite shortlisted Tenderers to an interview meeting where the Tenderer may provide a short presentation on their services and respond to questions from an interview panel. The Wise Group's target is for these interview meetings to take place on **week commencing Monday 16 September 2019** (subject to availability). Should previous deadlines or evaluation periods require to be extended, this date may have to be rescheduled; all Tenderers will be given as much prior notice as reasonably practicable of an amended interview meeting date.

Stage 7: The Wise Group will notify all shortlisted Tenderers of the outcome of the interview and the successful Tenderer by **Friday 20 September 2019**, but this period may be extended in the event that additional time is required by The Wise Group.

2.1.2 Key Dates

- **Monday 26 August 2019** → Date of publication of the ITT;
- **5pm on Friday 6 September 2019** (the Tender Deadline) → Deadline for submission of all Tenders to The Wise Group;
- **Monday 9 September 2019 to Thursday 12 September 2019** (inclusive) (the Evaluation Period) → **5pm on Friday 13 September 2019** is the deadline for The Wise Group considering and evaluating all submitted Tenders. This date can be extended by The Wise Group if required;
- **Week Commencing Monday 16 September 2019** → Interview meetings with shortlisted Tenderers;
- **5pm on Friday 20 September 2019** → Deadline for The Wise Group issuing notification of the Contract award to the successful Tenderer.

2.2 Contract award and Due Diligence

Contract award is subject to the formal approval process of The Wise Group. Until all necessary approvals are obtained, no Contract will be entered into. These approvals include successful completion of all necessary due diligence checks which The Wise Group will carry out on the successful Tenderer. The successful Tenderer will be required to provide its full consent to, and cooperation with, all checks, processes and due diligence. Following completion of all due diligence, The Wise Group will propose a date by which the Contract is to commence and will communicate this to the successful Tenderer (who shall become the Service Provider).

2.3 Contract award notification

Once The Wise Group has reached a decision in respect of the Contract award, it will notify all Tenderers of that decision. All Tenderers will generally be notified of the outcome of all Tenders as soon as possible following conclusion of the Evaluation Period, however this time period may be extended in the event that additional time is required by The Wise Group. The Wise Group will not be obliged to discuss its reasoning for declining any Tender with any Tenderer.

2.4 Debrief

Further to the rights of The Wise Group set out in Clause 2.3 above, The Wise Group reserves the right to refuse to provide any Tenderer with a reason for their failure to secure the Contract. Should any Tenderer request any feedback or debrief in respect of their Tender, such requests will be considered by The Wise Group on a case-by-case basis and replied to at The Wise Group's sole discretion.

3. TENDER COMPLETION INFORMATION

3.1 Formalities

Tender documents must be returned to The Wise Group's named representative using the details specified in Clause 1.7(a) above. The following requirements must be adhered to when submitting Tenders:

- (a)** where documents are embedded within other documents, Tenderers must provide separate electronic copies of the embedded documents;
- (b)** the Tender must be in English and drafted in accordance with the drafting guidance set out in this ITT;
- (c)** each Tender must be uniquely named or referenced;
- (d)** a table of contents must be provided;
- (e)** the Tender must be fully cross-referenced;
- (f)** a list of supporting material must be supplied;
- (g)** electronic copies of the Tender shall be in both Microsoft Office and PDF formats and delivered by electronic mail;
- (h)** Tenderers should use font Verdana and size 11 for all text; and
- (i)** The Tender must be clear, concise and complete. The Wise Group reserves the right to mark a Tenderer down or to exclude it from the procurement if its Tender contains any ambiguities or lacks clarity in any respect. Tenderers should submit only information that is necessary to respond effectively to this ITT. Unless specifically requested, extraneous presentation materials are not necessary or desired. Tenders will be

evaluated on the basis of the information submitted by the Tender Deadline.

Execution of Tenders

- Where the Tenderer is a **company**, the Tender must be signed by a director or duly authorised representative of that company (with such evidence provided to confirm that representative's authority to sign on behalf of The Wise Group);
- Where the Tenderer is a **consortium**, the Tender must be signed by a duly authorised representative of each member of the consortium, each agreeing to be jointly and severally responsible for the performance of the Tender and the Contract;
- In the case of a **partnership**, all of the partners should sign or, alternatively, only one may sign, in which case s/he must have, and should state that s/he has, authority to sign on behalf of the other partner(s). The names of all of the partners should be given in full together with the trading name of the partnership; and
- In the case of a **sole trader**, s/he should sign and give their full name together with the name under which they are trading.

Named Representative

Please supply details of the appropriate person within your organisation who can be contacted by The Wise Group in relation to your Tender. Please also give details of any other person(s) within your organisation who should be contacted to answer queries in relation to specific areas of your Tender. For each relevant person, please give their:

- name;
- role/job title;
- work address and location;
- telephone number;
- email address; and
- an explanation of their role, both within your organisation and in relation to the tender process.

3.2 Covering letter

Each Tenderer must also provide a covering letter and overall executive summary of its Tender. Each Tenderer must include in its covering letter:

- (a) an outline of the ways in which The Wise Group's requirements are to be met by the proposals set out in the Tenderer's Tender;
- (b) a summary of all of the services offered by the Tenderer in response to the ITT;
- (c) an overview of the implementation and operation of the Services by the Tenderer, including any location(s) from which the Services are to be provided and the extent to which offshoring is offered as part of the proposed solution;

- (d)** a description of the Tenderer's overall structure including (1) details of consortium/group structures (and in the case of an operating company, details of its ultimate parent company), (2) any aspects of the Services which may be sub-contracted out, and (3) the financial standing of:
 - i. the Tenderer;
 - ii. each relevant legal entity in any consortium/group structure; and
 - iii. each sub-contractor.
- (e)** the number of personnel/full time equivalent workers (FTEs) proposed to be used for the Services;
- (f)** the overall management approach in relation to implementation and service delivery;
- (g)** the Tenderer's approach to, and plans for, transition, implementation and exit management;
- (h)** an overview of the Tenderer's overall costs and proposals in relation to pricing;
- (i)** a clear statement of whether it is a consortium or a group of companies with one Tenderer;
- (j)** a clear statement of its commitment to meet The Wise Group's requirements, and the pricing, payment and performance model; and
- (k)** confirmation that the Tender(s) will remain open for a period of seven (7) Business Days or until the Tender Deadline.

If changes subsequently occur in relation to the statements set out in the covering letter, the applicable Tenderer must notify The Wise Group of such changes as soon as reasonably possible. The Wise Group reserves the right to disqualify any Tenderer that fails to duly notify The Wise Group of any changes to the statements set out in its covering letter.

3.3 Contract

Upon completion of the tender process and following the Contract Award, the successful Tenderer (becoming the Service Provider) and The Wise Group shall complete a Contract using this ITT, the Tender and any other relevant documentation as a template. The Contract will be completed at a date to be confirmed by The Wise Group, but such date shall precede the Commencement Date.

3.4 Documents forming the Contract

The following documents shall form part of, and will be annexed to, the Contract between The Wise Group and the successful Tenderer (becoming the Service Provider):

- (a)** the Contract and its Schedule as well as any appendices, annexes or any other documents detailed in the Contract as forming part of the Contract;

- (b) the Schedule of this ITT (including the specification of the Services set out in Part 1 of the Schedule of this ITT);
- (c) the successful Tender;
- (d) the pricing model (as completed by the successful Tenderer and forming part of its covering letter); and
- (e) any other relevant documents as identified and agreed between the successful Tenderer and The Wise Group.

Other than those documents set out at points (a) to (e) (inclusive) above, The Wise Group shall disregard all documents contained in the ITT and successful Tender when agreeing to the Contract.

3.5 Warnings and disclaimers

While the information contained in this ITT is believed to be correct at the time of issue, neither The Wise Group, its advisors nor any other awarding entities will accept any liability in any circumstances for its accuracy, adequacy or completeness, nor will any express or implied warranty be given. This exclusion extends to liability howsoever arising in relation to any statement, opinion or conclusion contained in, or any omission from, this ITT (including its Schedule) and in respect of any other written or oral communication whatsoever transmitted (or otherwise made available) to any Tenderer. No representations or warranties are made in relation to these statements, opinions or conclusions. This exclusion does not extend to any fraudulent misrepresentation made by, or on behalf of, The Wise Group.

All prospective Tenderers should note that any quantities or volumes contained in this ITT are for indicative purposes only, and any future quantities or volumes may vary from those stated (such future quantities or volumes will be communicated by The Wise Group to the Service Provider pursuant to the Contract at the relevant time).

If any Tenderer proposes to enter into a Contract with The Wise Group, it must carry out its own independent due diligence enquiries and rely only on:

- its own enquiries and judgment in relation to this ITT, including the preparation of its Tender; and
- the terms and conditions set out in the Contract (once signed), subject to the limitations and restrictions specified in it.

Neither the issue of this ITT, nor any of the information presented in it, should be regarded as a commitment or representation on the part of The Wise Group (or any other person) to enter into a contractual arrangement.

This ITT should not be regarded as an investment recommendation made by The Wise Group or any of its professional advisors. All suppliers are recommended to seek their own independent financial and legal advice.

3.6 Confidentiality

Each supplier and prospective Tenderer shall keep this ITT and any other documents subsequently issued by The Wise Group as part of this procurement confidential and shall not use or disclose any such information whatsoever other than as strictly necessary for the purpose of preparing and submitting a Tender.

The contents of this ITT must not be copied, reproduced, distributed, passed to any other person or otherwise at any time, except as strictly necessary for the purpose of enabling suppliers and prospective Tenderers to prepare and submit a Tender.

The Wise Group may use the information included in a Tenderer's Tender for any reasonable purpose connected with this ITT. In particular, once a Tenderer has been excluded, The Wise Group reserves the right to use any ideas contained in that Tenderer's Tender in any ongoing discussions with other Tenderers, but undertakes not to reveal the identity of the excluded Tenderer who originally provided these ideas.

3.7 Publicity

No publicity regarding the Services or the award of any Contract will be permitted unless and until The Wise Group has given its prior and express written consent to the relevant communication and has had the opportunity to review the proposed communication in full. For example, no statements may be made by any supplier or Tenderer to the media regarding the nature of any Tender, its contents, or any proposals relating to it without the prior written consent of The Wise Group and without The Wise Group having first had the opportunity to review the proposed statement in full.

3.8 Tenderer conduct and conflicts of interest

Any attempt by Tenderers or their advisors to influence the Contract award process in any way may result in the Tenderer being disqualified. Specifically, Tenderers shall not directly or indirectly, at any time:

- (a)** devise or amend the content of their Tender in accordance with any agreement or arrangement with any other person, other than in good faith with a person who is a proposed partner, supplier, consortium member or provider of finance;
- (b)** enter into any agreement or arrangement with any other person as to the form or content of any other Tender, or offer to pay any sum of money or valuable consideration to any person to effect changes to the form or content of any other Tender;
- (c)** enter into any agreement or arrangement with any other person that has the effect of prohibiting or excluding that person from submitting a Tender;
- (d)** canvass The Wise Group or any employees or agents of The Wise Group in relation to this procurement; or

- (e) attempt to obtain information from any of the employees or agents of The Wise Group or their advisors concerning another Tenderer or Tender.

Tenderers are responsible for ensuring that no conflicts of interest exist between the Tenderer and its advisors, and The Wise Group and its advisors. Any Tenderer who fails to comply with this requirement may be disqualified from the procurement at the sole discretion of The Wise Group.

3.9 Company's rights

The Wise Group reserves the right (in its sole and absolute discretion) to:

- (a) waive or change the requirements of this ITT from time to time without prior (or any) notice being given by The Wise Group to any supplier or prospective Tenderer;
- (b) seek clarification or further documentation in respect of a Tenderer's Tender;
- (c) disqualify any Tenderer that does not submit a compliant Tender in accordance with the instructions set out in this ITT;
- (d) disqualify any Tenderer that is guilty of serious or material misrepresentation in relation to its Tender, expression of interest or the tender process. Any Tenderer who directly or indirectly canvasses any employee of The Wise Group concerning the award of the Contract will be disqualified. The Wise Group may exclude any Tenderers from the tender process who have been found to be in breach of any confidentiality obligations (as set out in Clause 3.6 of this ITT) or intellectual property rights (as set out in Clause 3.12 of this ITT), and may pursue any remedy or take any other action as it considers appropriate in the event of a breach by a supplier or Tenderer of such confidentiality obligations and intellectual property rights;
- (e) withdraw this ITT at any time, or to re-invite Tenders on the same or any alternative basis;
- (f) choose not to award any Contract pursuant to this ITT; and
- (g) make whatever changes it sees fit to the Tender Timetable, structure or content of the ITT, depending on internal approval processes or for any other reason whatsoever.

3.10 Tender costs

The Wise Group will not, under any circumstances, be liable for any Tender costs, expenditure, work or effort whatsoever or howsoever incurred by a supplier or Tenderer in carrying out enquiries in relation to, proceeding with, or participating in, this ITT (including the preparation and submission of a Tender), including if this ITT is withdrawn, terminated or amended by The Wise Group.

3.11 Guarantees

The Wise Group has qualified the Tenderers on the assumption that, where the Tenderer is an operating company, it will be guaranteed by its parent company. As a result, The Wise Group will require each Tenderer to confirm the identity of the guarantor of its obligations under any Contract. This guarantor should be the ultimate parent company of the Tenderer, except in exceptional circumstances. In the case of consortia, The Wise Group will require confirmation that it will provide either a parent company guarantee from the lead consortium member or an equivalent level of security.

3.12 Intellectual property

All intellectual property rights in and pursuant to this ITT, and all materials provided by The Wise Group or its professional advisors in connection with this ITT are, and shall remain, the property of The Wise Group and/or its professional advisors.

4. TENDER EVALUATION MODEL

The Wise Group confirms that it will use some or all of the criteria set out in Clause 4.1 below to evaluate the Tenders. The Wise Group reserves the right to alter these criteria at its sole discretion and may advise the Tenderers of any alteration but is not obliged to do so at any time.

4.1 Evaluation criteria

The Wise Group will use the following criteria when evaluating the Tenders:

- (a)** Cultural fit;
- (b)** What services are on offer;
- (c)** Unique and insightful approaches to the Services required by The Wise Group;
- (d)** Financial/commercial stability;
- (e)** Value for money as well as the return The Wise Group will receive for awarding a Contract;
- (f)** Costs, including set-up costs, ongoing costs and future costs; and
- (g)** Any other criteria that The Wise Group sees fit for this particular ITT.

5. ASSESSMENT QUESTIONS FOR COMPLETION BY TENDERERS

Information required	Response
1. Registered name of your trading entity (company, partnership or otherwise).	
2. Registered name of the company, partnership or otherwise with which it is proposed that The Wise Group enters into a Contract in relation to the Services.	
3. Registered address and company number (if applicable) of each company, partnership or otherwise disclosed above.	
4. Contact name(s) for enquiries related to specific areas of your Tender.	
5. Contact's position/role within company, partnership or otherwise.	
6. Contact's email address(es).	
7. Contact's landline telephone number(s).	
8. Contact's mobile telephone number(s).	

SCHEDULE – PART 1: SPECIFICATION OF SERVICES

Wise Steps Counselling Service

A collaborative arrangement as part of the Wise Steps programme to offer customers access to counselling at no cost to the individual.

Referral Criteria

Eligible individuals are those who are:

- aged 18 years and over;
- existing Wise Steps customers; and
- coping with any form of emotional distress, stress, anxiety, depression and/or life issues including (without restriction) bereavement, relationship difficulties and work problems.

Referral Process

Referrals will be accepted from coaching partners working within the Programme.

Time-limited counselling

- The Programme will offer up to six (6) counselling sessions of fifty (50) minutes each for Programme participants, which are usually delivered on a weekly basis.
- The first counselling session will include an assessment and detailed risk profile. Customers may be referred on to a more appropriate IAPT (Improving Access to Psychological Therapies) service at this point if necessary. Coaching partners will be advised of any onward referrals made.
- Initial appointments will be allocated in referral date order and arranged directly with customers, unless agreed otherwise with coaching partners.
- In certain risk-related circumstances, relevant information from a participant's counselling session(s) may require to be shared with third party professionals (on a need-to-know basis only) to ensure the safety of both the participant and others.
- Providers must work within both the Safeguarding Adults and Safeguarding Children procedural framework, and in accordance with Data Protection legislation including the General Data Protection Regulation (GDPR).

Customer Criteria

Customers most likely to benefit from time-limited counselling are those who are:

- capable of formulating their problems in a reasonable way;
- motivated to change;
- able to feel emotion;
- able to engage with counsellors from the first session; and
- able to be psychologically minded and insightful.

Suitability

Time-limited counselling is most suitable for:

- non-complicated bereavement, grief and loss;
- life issues including relationship difficulties, divorce, separation, work problems, illness, mild depression, stress, anxiety and self-esteem issues; and
- customers with one main presenting issue (rather than multiple presenting issues).

Unsuitability

This service is **not** suitable for customers who:

- are experiencing major depression or who have issues surrounding addiction. Third party agencies are available to provide services for individuals experiencing these issues;
- require a crisis team or a replacement for a CPN (community psychiatric nurse). Home visits are not included and a drop-in service will not be available;
- may be likely to attend counselling sessions when under the influence of drugs and/or alcohol, or are likely to behave in an aggressive and/or threatening manner to any member of staff; and
- are currently engaged with another counselling service or secondary care mental health service.

Additional Information

- Counselling notes will not be shared with Programme coaching partners, however, coaching partners will be informed of a customer's counselling attendance and/or onward referral pathway.
- Counselling can be offered in a customer's own local area, on the understanding that a private room will be made available which is suitable for the provision of counselling.

Coaching partners will be required to cover the cost of customer travel expenses.

End of Schedule – Part 1

SCHEDULE – PART 2: GLOSSARY

Business Day - A day other than a Saturday, Sunday or public holiday in Scotland when banks in Edinburgh are open for business;

Business Hour – An hour between 09:00 hours and 17:00 hours on a Business Day;

Commencement Date – The date of commencement of the Services pursuant to the Contract;

Contract – The contract to be entered into between the Parties pursuant to which the Service Provider will provide the Services;

Contract Award – The date of communication by The Wise Group to the Tenderer that the Tenderer has been successful in the Tender and has been awarded the Contract;

Evaluation Period – The period of four (4) Business Days commencing on the Tender Deadline, during which The Wise Group shall consider the Tenders;

ITT – The Invitation to Tender for the Services;

Parties – Together The Wise Group and the Service Provider;

Programme – Wise Steps;

Services – The counselling services required by The Wise Group in connection with the Programme, to be provided by the Service Provider pursuant to the Contract;

Service Provider – The successful Tenderer who will provide the Services pursuant to the Contract;

Tender – A document submitted by a Tenderer for consideration by The Wise Group in response to the ITT;

Tender Deadline – The date falling two calendar weeks immediately after the date of publication of the ITT;

Tenderer – A company, individual or group which has submitted a Tender; and

The Wise Group – The Wise Group (company number: SC091095).

END OF DOCUMENT
