



18 May 2022

Invitation to Tender for Research and Learning Consultancy Services

This document is an invitation to tender (“**ITT**”) issued by The Wise Group in connection with the appointment of an external provider of certain consultancy services (as more fully described in Clause 1.2 of the ITT).

Each tender (“**Tender**”) submitted by each supplier (“**Tenderer**”) who responds to the ITT should be detailed enough to allow The Wise Group to make an informed selection of the most appropriate provider.

The ITT sets out the guidelines which all Tenders must adhere to, and The Wise Group’s requirements for the Services in order to assist Tenderers in preparing and submitting their Tender response.

A number of terms are used in the ITT which are specific to The Wise Group and the Services. These are defined in the glossary set out in Part 2 of the Schedule to this ITT.

Contact details for The Wise Group are also set out on page 3 of the ITT should any additional information be required.

We look forward to receiving your response.

The Wise Group



Invitation to tender for Research and Learning Consultancy Services

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This ITT is dated 18 May 2022

1. INTRODUCTION AND BACKGROUND

1.1 Introduction to The Wise Group

The Wise Group is a leading social enterprise, working to lift people out of poverty. As an enterprise, we build bridges to opportunity for the most vulnerable in our society. Our team does this through mentoring support, employment, skills, and energy advice throughout Scotland and the North East of England.

Every day The Wise Group supports its customers into jobs, works to lift people out of fuel poverty, and helps people coming out of prison to build a better future. Our work is varied, and underlying everything we do is a passion and commitment for social justice and a fairer society for all.

The Wise Group builds better lives, better communities and stronger businesses, and we don't do it alone. We work with a range of partners across Scotland and the North East of England to make a real and lasting difference to the lives of thousands of people and families every year.

1.2 The Services

- (a) The Wise Group is seeking to appoint an external provider of the services outlined in **Part 1 of the Schedule** (such description is without limitation, not exhaustive and The Wise Group reserves the right to amend this from time to time as it sees fit) for the duration specified in **Clause 1.4** of this ITT.
- (b) Please note, the aim of this ITT is to provide Tenderers with the opportunity to detail all of the available services they can provide to The Wise Group together with the associated costs, and to offer unique insights into these services to satisfy and meet the requirements of The Wise Group. Accordingly, the ITT will not detail further The Wise Group's requirements beyond what is included in Part 1 of the Schedule.

1.3 The ITT

This ITT:

- (a) provides more detail regarding the Services required by The Wise Group, and sufficient information to enable Tenderers to submit a compliant Tender;
- (b) confirms The Wise Group's specific requirements and the instructions which all prospective Tenderers are asked to follow when submitting their Tenders;
- (c) sets out the overall timetable and process for this procurement, which all Tenderers must adhere to;
- (d) sets out the evaluation criteria that will be used by The Wise Group to evaluate the Tenders;
- (e) explains the administrative arrangements for the submission and receipt of Tenders; and
- (f) contains assessment questions for Tenderers to complete as part of the Tender.

This ITT does not constitute an offer capable of acceptance to form a contract.

1.4 The Contract

- (a) Subject to the terms of this ITT, The Wise Group proposes to enter into a contract ("**Contract**") with the successful Tenderer in respect of the Services for a one (1) year period, commencing in June 2022 and continuing until June 2023 (exact dates to be confirmed by The Wise Group nearer the relevant time), unless terminated earlier in accordance with the Contract.
- (b) 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 letter of acceptance has been issued to the successful Tenderer, such letter being signed by an authorised representative of The Wise Group and issued following completion of the full tender process.

1.5 Clarifications about the Services or ITT (by Tenderers)

- (a) Any specific enquiries, questions or clarification requests in relation to this ITT (or any matters arising from it) must be submitted to The Wise Group's Procurement team in writing - by email - to the following address: procurement@thewisegroup.co.uk
- (b) The deadline for receipt of clarification requests 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.

- (c) The Wise Group will respond to all reasonable clarification requests (received in accordance with this **Clause 1.5** of the ITT) as soon as practicable and without delay, to the extent possible. An initial 'holding' email will be sent by The Wise Group to the relevant Tenderer to acknowledge receipt of their clarification request in the first instance, and to advise the Tenderer of any applicable timescales for subsequent responses.

If The Wise Group requires additional time to clarify any request, this will be indicated to the relevant Tenderer as soon as practicable and without delay. A formal response document will then be issued by email to each prospective Tenderer, addressing their clarification request(s).

To the extent relevant to 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 clarification request as confidential and not issue the individual response to any other Tenderers, it must state this in a clear, direct and unambiguous way when submitting the initial clarification request to The Wise Group by email.

If, however, The Wise Group is of the opinion that the clarification request is not sensitive and/or confidential and should therefore not be treated as such, then The Wise Group will inform the Tenderer of this as soon as reasonably practicable and give the Tenderer an opportunity to withdraw it. If the clarification request is not subsequently withdrawn by the Tenderer, The Wise Group's response (to the extent it deems this relevant to the other Tenderers) will be issued to all Tenderers without revealing the identity of the Tenderer who had requested confidentiality. Unless a clarification request has been withdrawn by a Tenderer, any wider communication by The Wise Group of a clarificatory response to all/other Tenderers will be at the sole and exclusive discretion of The Wise Group.

1.6 Clarifications about the Tenders (by The Wise Group)

The Wise Group reserves the right, in its sole and exclusive discretion and without restriction or limit of time, to seek clarification from all Tenderers on any aspect of their Tender during the Evaluation Period where it deems necessary. It shall be a condition of this ITT and the wider procurement to respond to any clarificatory requests received from The Wise Group, and in addition, all Tenderers are kindly asked to respond promptly, without delay, to provide as much detail as possible and to avoid giving vague or ambiguous answers.

2. TENDER TIMETABLE AND PROCESS

2.1 Tender Timetable and Key Dates

2.1.1 Tender Process

Stage 1 (Publication)	The Wise Group will publish the ITT on Wednesday 18 May 2022 on its website at https://www.thewisegroup.co.uk
Stage 2 (Submission)	<p>Prospective Tenderers will have until the Tender Deadline (being 5pm on Tuesday 31 May 2022) - to submit a Tender to The Wise Group.</p> <p>All responses to this ITT must be sent to The Wise Group using the email address set out in Clause 1.5. Any Tender received after the Tender Deadline shall not be opened or considered by The Wise Group. The Wise Group may, in its sole and exclusive discretion (but shall not be under any obligation to), extend the Tender Deadline in these circumstances and notify all relevant Tenderers of any subsequent change as soon as possible and without delay.</p>
Stage 3 (Evaluation)	The Evaluation Period shall take place following the Tender Deadline, but may be shortened or extended at The Wise Group's sole and exclusive discretion.
Stage 4 (Shortlist)	The Wise Group will shortlist a number of Tenderers. All Tenderers will be notified of the outcome of their respective Tenders as soon as possible but by no later than 5pm on Monday 6 June 2022 . This period may be shortened or extended at The Wise Group's sole and exclusive discretion. The Wise Group will also arrange the follow-up meetings described at Stage 5 below during the same period.
Stage 5 (Presentation)	The Wise Group will invite shortlisted Tenderers to a meeting (most likely by video call), where the Tenderer will be expected to provide a short presentation on their services and to answer any follow-up questions from The Wise Group. The current target is for these presentations to take place during week commencing Monday 6 June 2022 , subject to availability. Should any of the previous deadlines (listed above) be shortened or extended, however, this proposed time period may require to be changed by The Wise Group, in which case all relevant Tenderers will be given as much prior notice as reasonably practicable of the amended presentation date(s).
Stage 6 (Notification)	The Wise Group aims to notify all shortlisted Tenderers (including the successful Tenderer) of the outcome of their respective presentations by no later than 5pm on Friday 10 June 2022 , however this date may be shortened or extended at The Wise Group's sole and exclusive discretion.
Stage 7 (Service Commencement)	The Wise Group intends the Services to commence in June 2022 , subject to the Contract being agreed and signed by both parties. This proposed time period may be amended at The Wise Group's sole and exclusive discretion, however.

2.1.2 Key Dates

Please note: All dates are subject to change and may be amended by The Wise Group as and when required

Wednesday 18 May 2022	Date of issue of the ITT on The Wise Group's website.
5pm on Tuesday 31 May 2022	Deadline for submission of all Tenders to The Wise Group.
Wednesday 1 June 2022 to Monday 6 June 2022 (inclusive)	The Wise Group's Tender Evaluation Period.
5pm on Monday 6 June 2022	Deadline for The Wise Group to (i) confirm the initial tender outcome to all Tenderers; and (ii) schedule presentations with the shortlisted Tenderers.
Week commencing Monday 6 June 2022	Presentations by shortlisted Tenderers.
5pm on Friday 10 June 2022	Deadline for The Wise Group to (i) evaluate all presentation performances and selecting the successful Tenderer; and (ii) issuing notification of the Contract award to the successful Tenderer.

2.2 Contract award notification

- (a) All Tenderers will be notified of the initial outcome of all submitted Tenders as soon as possible following conclusion of the aforementioned Evaluation Period, however this time period may be extended by The Wise Group in the event that additional time is required.
- (b) Once all follow-up presentations have taken place and The Wise Group has reached a decision in respect of the Contract award, it will notify all Tenderers (including the successful Tenderer) in writing by email.
- (c) Should any Tenderer request feedback in relation to their submitted Tender, such requests should be sent to The Wise Group using the email address specified in **Clause 1.5**. All such requests will be considered by The Wise Group on a case-by-case basis and replied to at its sole and exclusive discretion. Notwithstanding the foregoing, The Wise Group will not be obliged under any circumstances to discuss its reasoning for declining any Tender and/or to provide feedback to any unsuccessful Tenderer. Furthermore, The Wise Group reserves the right (in its sole and exclusive discretion) to decline any request from an unsuccessful Tenderer to provide feedback and/or to confirm a reason for their failure to secure the Contract.

2.3 Contract award and Due Diligence

- (a) Contract award is subject to The Wise Group's formal approval process. Until all necessary approvals have been obtained, no Contract will be entered into. These approvals will be notified to the successful Tenderer from time to time by The Wise Group, and include (without limitation) successful completion of all necessary due diligence checks which The Wise Group will carry out on the successful Tenderer prior to Contract commencement (as well as on an ongoing basis thereafter should the need arise in The Wise Group's sole opinion).
- (b) It is a condition of this ITT and the wider procurement that the successful Tenderer provides its full consent to, and cooperation with, all necessary checks, processes and due diligence. This shall include provision by the successful Tenderer (on request) of specified policies and procedures to satisfy The Wise Group as to their compliance with certain laws, including (without limitation) the Data Protection Act 2018, the General Data Protection Regulation (GDPR), GDPR as it forms part of the law of England and Wales, Scotland and Northern Ireland by virtue of the European Union (Withdrawal) Act 2018, the Modern Slavery Act 2015 and the Equality Act 2010 (each as amended, varied or superseded from time to time).

2.4 The Contract

Following the Contract Award, the successful Tenderer and The Wise Group shall complete a Contract using this ITT, the Tender and any other relevant documentation (to be identified and agreed between the parties at the time) as a template. The Contract will be completed and signed prior to the Commencement Period and it is a condition of this ITT and the wider procurement that the successful Tenderer uses its best endeavours to ensure that this is achieved.

2.5 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:

- (a) the Contract and its schedule(s) including any appendices, annexes or other supporting documents stipulated as forming part of the Contract;
- (b) this ITT (including its Schedule);
- (c) the successful Tender;
- (d) the pricing model (as completed by the successful Tenderer and forming part of its covering letter and Tender); and
- (e) any other relevant documents as may be identified and agreed between the successful Tenderer and The Wise Group at the time.

Other than those documents listed in points (a) to (e) (inclusive) above, The Wise Group shall disregard all other documents when entering into the Contract with the successful Tenderer.

3. TENDER COMPLETION INFORMATION

3.1 Formalities

Tender documents must be returned to The Wise Group using the details specified in **Clause 1.5** of this ITT. The following requirements must be adhered to by all Tenderers (to the extent applicable) when submitting Tenders:

- (a) the Tender must be in English and drafted in accordance with the drafting guidance set out in this ITT;
- (b) where documents are embedded within other documents, Tenderers must provide separate electronic copies of the embedded documents;
- (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 email; and
- (h) the Tender must be clear, concise and complete. The Wise Group reserves the right (in its sole and exclusive discretion) 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 the 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 to The Wise Group on/before 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 company);
- 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 liable 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 she/he/they must have, and should state that she/he/they 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**, she/he/they should sign and give their full name (including any middle names) together with the full business name under which they are trading.

Named Representative:

Please supply details of the appropriate person(s) 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 can be contacted to answer any 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(s);
- 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 containing an overall executive summary of its Tender. The covering letter must confirm:

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

If any changes subsequently occur in relation to the statements set out in a Tenderer's covering letter, the relevant Tenderer must notify The Wise Group of such changes as soon as reasonably practicable and without undue delay. The Wise Group reserves the right (in its sole and exclusive discretion) to disqualify with immediate effect any Tenderer that fails to duly notify The Wise Group of any changes to the statements set out in its covering letter in accordance with the requirements of this ITT.

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 submitted Tenders. The Wise Group reserves the right (in its sole and exclusive discretion) to alter these criteria in any way that it sees fit from time to time, and may (but shall not be under any obligation to) advise Tenderers of any such alterations.

4.1 Evaluation criteria

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

- (a) Cultural fit;
- (b) The services on offer;
- (c) Unique and insightful approaches to providing the Services required by The Wise Group;
- (d) Financial/commercial stability;
- (e) Value for money, as well as any 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. GENERAL INFORMATION

5.1 Warnings and disclaimers

- (a) 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 whatsoever 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 any such statements, opinions or conclusions. Notwithstanding the foregoing, this exclusion does not extend to any fraudulent misrepresentation made by, or on behalf of, The Wise Group.
- (b) All prospective Tenderers should note that any quantities or volumes contained in this ITT (and in particular, any description of the Services) are for indicative purposes only, and any subsequent quantities or volumes may vary from those stated (such future quantities or volumes will be communicated by The Wise Group to the successful Tenderer prior to entering into the Contract).

- (c) 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 submission; and
 - the terms and conditions of the Contract (once signed), subject to the limitations and restrictions specified within it.
- (d) 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.
- (e) 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, legal and other relevant professional advice in respect of same.

5.2 Confidentiality

- (a) Each prospective Tenderer shall keep any documents or information issued to it by The Wise Group (whether directly or indirectly) as part of this procurement confidential, and shall not use or disclose any such documents or information whatsoever other than as strictly necessary for the purposes of preparing and submitting a Tender and for no other reason whatsoever.
- (b) 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 prospective Tenderers to prepare and submit a Tender and for no other reason whatsoever.
- (c) The Wise Group may use any of the information included in a Tenderer's submitted Tender for any reasonable purpose connected with this ITT. In particular, once a Tenderer has been excluded, The Wise Group reserves the right (in its sole and exclusive discretion) to use any ideas contained in that Tenderer's submitted Tender in any ongoing discussions with other Tenderers, but undertakes (to the extent practicable and unless unavoidable) not to reveal the identity of the excluded Tenderer who originally provided those ideas.

5.3 Publicity

No:

- (a) publicity regarding the Services or the award of any Contract will be permitted by any Tenderer at any time; or
- (b) 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 at any time,

without the prior and express written consent of The Wise Group (which The Wise Group may withhold in its sole and absolute discretion) and without The Wise Group first having had the opportunity to (i) review the proposed statement or communication in full; and (ii) query and subsequently clarify/resolve any issues or concerns that may arise in relation to it without restriction or limit of time.

5.4 Tenderer conduct and conflicts of interest

Any attempt by Tenderers or their advisors to influence the Contract award process in any way will result in the Tenderer being disqualified. Specifically, Tenderers must not (either 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 submitted Tender.

Tenderers will be solely responsible for ensuring that no conflicts of interest arise or exist, either now or in the future and whether actual or potential, between the Tenderer and its advisors and The Wise Group and its advisors, and The Wise Group shall assume no responsibility whatsoever under any circumstances in connection with same. Any Tenderer who fails to comply with this requirement may be disqualified from the procurement at the sole and exclusive discretion of The Wise Group.

5.5 The Wise Group's rights

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

- (a) waive or change any of the requirements of this ITT in any manner whatsoever and at any time, without the need to give prior notice to any supplier or prospective Tenderer;
- (b) seek clarification (including, without limitation, the right to request any such further documentation as The Wise Group may determine is required) in respect of a Tenderer's submitted 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 the contents of its Tender or any subsequent clarificatory response provided to The Wise Group. 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 Tenderer from the tender process who has been found to be in breach, or where any such breach is reasonably suspected or anticipated by The Wise Group to occur, of any confidentiality obligations (as set out in **Clause 5.2** this ITT) or intellectual property rights (as set out in **Clause 5.7** of this ITT), and may pursue any remedy or take any other action whatsoever without restriction as it considers necessary in the event of such a breach by a supplier or Tenderer;
- (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 from time to time to (i) the Tender Timetable; or (ii) the structure and/or content of the ITT or the resulting Contract, for any reason whatsoever (regardless of whether such changes are prompted by internal or external factors).

5.6 Tender costs

The Wise Group will not, under any circumstances and without restriction or limit of time, be liable for any Tender costs, expenditure, losses, work, effort or any other related costs whatsoever or howsoever incurred, whether directly or indirectly, 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, responding to any clarificatory requests and/or the preparation for and giving of any subsequent presentations, including travel and/or accommodation costs and expenses), including if this ITT is withdrawn, terminated or amended in any manner by The Wise Group for any reason whatsoever.

5.7 Intellectual property

All intellectual property rights of The Wise Group, irrespective of when such rights were created, and including (without limitation) all rights in and pursuant to this ITT and all materials provided by The Wise Group in connection with this ITT and the wider procurement, are and shall remain at all times the exclusive property of The Wise Group. For the avoidance of doubt, no such intellectual property rights of The Wise Group shall pass to any other party (including any Tenderer) pursuant to this ITT or the wider procurement, and such intellectual property rights cannot be used by any other party (including any Tenderer) without The Wise Group's prior and express written consent (which The Wise Group may withhold or delay in its sole and absolute discretion) and without the grant of a formal written licence by The Wise Group in respect of same.



6. ASSESSMENT QUESTIONS FOR COMPLETION BY TENDERERS

Information required	Response
1. Registered name <u>and</u> trading name (if applicable) of your entity (company, partnership or otherwise).	Registered name: Trading name:
2. Registered name <u>and</u> trading name (if applicable) of the company, partnership or otherwise with which it is proposed that The Wise Group enters into a Contract in relation to the Services.	Registered name: Trading name:
3. Registered address <u>and</u> company number (if applicable) of each company, partnership or otherwise disclosed above.	Registered address: Company number:
4. A) Name(s) of all nominated internal contacts to whom enquiries relating to specific areas of your Tender can be directed by The Wise Group.	
B) Each nominated internal contact's position/role within the company, partnership or otherwise.	
C) Each nominated internal contact's email address.	
D) Each nominated internal contact's telephone number.	Landline: Mobile:

THE SCHEDULE

PART 1 – THE SERVICES

Summary of Services

The provision of Research & Learning consultancy services in connection with the Wise Steps Programme (the “**Programme**”) for a one (1) year period, commencing in June 2022 and continuing until June 2023 (exact dates to be confirmed by The Wise Group nearer the relevant time), unless terminated earlier in accordance with the Contract. The Services can be predominantly performed by the successful Tenderer remotely in line with The Wise Group’s ‘Remote First’ approach, with travel to our North East ‘hub’ locations as and when required.

For the avoidance of doubt, the successful Tenderer will be engaged by The Wise Group on the Programme only, and for no other project or purpose whatsoever.

Wise Steps Programme

Wise Steps is part of the Building Better Opportunities (“**BBO**”) programme across England, funded by Big Lottery Fund operating as The National Lottery Community Fund, and the European Social Fund. The Wise Group delivers Wise Steps 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 us to gain an understanding of how we 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 has since been extended several times by the National Lottery Community Fund, most recently for an additional year from 2022-23 (inclusive).

Specific Requirements of the Services

As part of the Services and on The Wise Group’s behalf, the successful Tenderer will be required to:

- co-design and deliver a comprehensive research, learning and dissemination programme across the Programme partnership;

- co-design and conduct primary research involving a range of data collection techniques (e.g. questionnaires, focus groups, interviews, case studies etc), in conjunction with the Programme's existing external evaluator;
- undertake secondary research projects;
- conduct all research in line with ethical research standards and in the best interest of research subjects;
- provide comprehensive written research and evaluation reports;
- undertake statistical analysis of data collected across the Programme;
- produce a dissemination strategy, which includes quarterly themed learning and networking events across the full partnership, and further smaller learning sessions in Local Authority areas;
- organise, prepare and facilitate learning via focus groups, surveys and interviews with participants and service users who are engaged in the Participant Steering Group and other activities with colleagues;
- produce a written quarterly briefing;
- build up contacts and relationships with other delivery partners, including strategic partners, as well as with other BBO programmes and key stakeholders;
- build up contacts and relationships within the research and policy community, and establish partnership approaches to evaluation.

Experience, Qualifications and Skills Level

The Wise Group considers the following qualifications and/or skills to be essential to the Services:

- relevant qualification relating to area of specialism;
- educated to NVQ level 3 or ability to operate at this level with a broad range of relevant experience;
- analytical and problem-solving capability;
- competent in the use of technology, relevant systems and key software packages;
- effective *(i)* verbal and written communication skills to ensure proficient reporting and customer service; and *(ii)* interpersonal and relationship building skills; and
- the ability to *(i)* demonstrate competencies required to undertake the Services; *(ii)* demonstrate knowledge and experience of operational delivery or specialist area; *(iii)* use initiative and judgement to solve problems; and *(iv)* plan or schedule work over days and weeks, and respond to changing pressures or requirements.

**THE SCHEDULE
PART 2 - GLOSSARY**

Commencement Period	the Services pursuant to the Contract shall commence in June 2022 (an exact date will be confirmed by The Wise Group nearer the relevant time), subject to the Contract being agreed and signed by both parties;
Contract	means the contract to be entered into between the Parties pursuant to which the successful Tenderer will provide the Services to The Wise Group;
Contract Award	means the date when The Wise Group confirms in writing to the Tenderer that the Tenderer has been successful in the Tender and has been awarded the Contract;
Evaluation Period	means the period commencing on Wednesday 1 June 2022 until Monday 6 June 2022 (inclusive), during which The Wise Group shall consider the submitted Tenders;
ITT	means this Invitation to Tender for the Services;
Parties	means together The Wise Group and the successful Tenderer;
Programme	means the Wise Steps programme (as more fully described in Part 1 of the Schedule to this ITT);
Services	means the Research and Learning consultancy services required by The Wise Group (as more fully described in Part 1 of the Schedule to this ITT), to be provided by the successful Tenderer pursuant to the Contract;
Schedule	means the schedule to this ITT in two parts, set out on pages 15 to 17 (inclusive) hereof;
Tender	means a document submitted by a Tenderer for consideration by The Wise Group in response to the ITT;
Tender Deadline	means 5pm on Tuesday 31 May 2022;
Tenderer	means a company, individual or group which has submitted a Tender; and
The Wise Group	means The Wise Group (company number SC091095), and all references to “ we ” and “ our ” shall be construed accordingly.

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