

**Subcontractor Expression of Interest Application Form for the delivery of the National Careers Service. (Due Diligence)**

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**1.0 INTRODUCTION**

**Background Information**

Education Development Trust (hereafter known as EDT) has been the prime contractor for the delivery of the National Careers Service in the North East since 2008 and in a number of other regions since 2018.

The fundamental principles of the National Careers Service are to provide a service that responds to the needs of individuals and employers, helps people find sustainable work and in turn, makes the region more competitive and successful.

The various channels of the National Careers Service (online/digital, telephone, face to face) work together as a single service.

The National Careers Service offers the following service to adults, via the channel or channels that they choose to engage with:

* Professional information, advice and guidance on careers and skills
* Access to up-to-date labour market information, which reflects national, sectoral, regional and local intelligence to inform customer decision making
* Information to raise awareness of an individual’s potential entitlements to public funding to support learning
* Support in opening a lifelong learning account
* Access to up-to-date information on courses, training and learning opportunities
* More detailed careers advice and guidance, such as information about the qualifications and skills required for roles, advice on funding options, advice on returning to work, and advice on overcoming potential barriers to progression
* Support to enable individuals to manage their own careers and help them get on in learning, work and life
* Referral to and from a wide range of relevant and specialist services and agencies (including appropriate websites) such as the Citizens Advice Bureau, housing associations, debt advice agencies, community legal advice
* Identification of personal goals and targets

**Branding**

The service operates under one brand – The National Careers Service.

**2.0 SERVICE OFFER AND DEFINITIONS**

**Contract Duration**

The initial contract available to successful applicants is negotiable with the Subcontractor Manager.

**Customer**

An individual who has received careers advice/guidance from the National Careers Service and has received a Skills Action Plan

**Skills Action Plan**

A record of the customer’s career goals, learning goals, discussion points/advice provided, and action plan. This must be agreed with the customer and updated at subsequent interactions.

Advisers record the customer’s details, their Skills Action Plan and their journey and progression information in our web-based Customer Relationship Management (CRM) system.

**Eligibility**

To be eligible for the service, the customer must be:

* Aged 19 or older, or
* Aged 18 or older if they are a Jobcentre Plus customer or they are in custody, and
* Living or working in England

**Priority Groups**

Within the eligible population, there is a focus on particular priority customers who hold one or more of the following characteristics:

* 18 - 24-year-olds not in education, employment, or training (NEETs)
* Low-skilled adults without a level 3 qualification
* Adults who have been unemployed for more than 12 months
* Single parents with at least one dependent child living in the same household
* Adults with special educational needs and/or disabilities; and
* Adults aged 50 years and over who are unemployed or at demonstrable risk of unemployment.

**Quality Assurance**

All organisations providing the National Careers Service must meet minimum quality requirements. These include: -

* Holding and retaining the matrix standard (new standards) or achievement within 6 months of the start of the contract.
* Robust quality improvement processes that demonstrate organisational competence in relation to Ofsted’s Common Inspection Framework, continuous improvement and evaluation
* Robust procedures for the safeguarding of vulnerable adults
* A competent workforce. All advisers must be qualified to a minimum of NVQ Level 3 or equivalent in Careers Information, Advice and Guidance. If new advisers are to be recruited in to post, there is an expectation that they have the Level 3 to be able to deliver on the contract and that they achieve a Level 4 qualification within 12 months of joining your organisation. Plans for continuous professional development must be in place for all Advisers
* Arrangements in place to protect personal information securely that conform to government security standards; all personal data that is transmitted must be appropriately protected and stored in line with GDPR and Cyber Essential Plus Certification.
* Subcontractors must follow safer recruitment practices and conduct thorough background checks on any member of staff working on the National Careers Service contract, either directly with customers or in a management or administrative capacity.

Subcontractors must have representation at formal quarterly review meetings with the Contract Manager and should also attend the regular network meetings.

There will also be an expectation for organisations to release Advisers to attend our CPD opportunities made available to the network on the CPD calendar.

**Application Requirements**

Applications must be submitted on the enclosed Application Template. The information included in this template requires applicants to provide evidence of the ability to meet the contract aims, capacity to deliver, quality standards, details of methodology to be used, staff information, and a profile of projected service outcomes.

**Funding**

Funding is paid monthly on an outcome basis as described below\*:

Priority Customer

* Career Management Outcome (CMO) *£44.00*
* Job Outcome (JLO) *£73.00*
* Learning Outcome (JLO) *£50.00*
* Maximum available to Subcontractor *£167.00*

Non-Priority Customer

* Career Management Outcome (CMO) *£11.00*
* Job Outcome (JLO) *£24.00*
* Learning Outcome (JLO) *£15.00*
* Maximum available to Subcontractor *£50.00*

*\*These rates are subject to final confirmation of final contract values from the DfE and may be subject to change.*

**Equality**

Applicants are expected to comply fully with all relevant legislation including the Equality Act 2010.

**Queries regarding Applications/Submissions**

Any questions regarding the content of applications must be made via email to bblack@educationdevelopmenttrust.com

**Submission of Applications**

Completed Applications must be signed and emailed to:

subcontractingopportunities@educationdevelopmenttrust.com and CC in bblack@educationdevelopmenttrust.com

**Closing date for Applications:** Open ended

**3.0 APPLICATION TEMPLATE**

Please complete this following application template in full and submit with all required attachments as listed in Section D of this template.

Section A: Company Details

Section B: Policies and Procedures

Section C: Staff Information

Section D: Attachments/Checklist

Section E: Declaration

**NATIONAL CAREERS SERVICE 2023 – 2024**

**Section A – Organisation Details**

**i) Organisation Name and Contact Details**

|  |  |
| --- | --- |
| Organisation Name |  |
| Address and Post Code |  |
| Telephone Number |  |
| Web Address |  |
| Primary contact name and designation |  |
| Primary contact email address |  |
| Primary contact telephone number/s |  |
| Trading Status a) public limited companyb) limited companyc) limited liability partnershipd) other partnershipe) sole traderf) third sectorg) other (please specify your trading status) |  |
| Company Registration Number (if applicable) |  |
| Head Office DUNS number (if applicable) |  |
| Registered VAT Number (if applicable) |  |
| Type of organisationa) private Sectorb) public sectorc) local authorityd) other (please specify your organisation type) |  |
| Charity Commission Number (if applicable) |  |
| If you already deliver the National Careers Service, please specify your qualified Adviser FTE (Full Time Equivalent) resource (e.g., 2.5 FTE) |  |

**ii) Additional Contact Details for the contract (e.g., contract / compliance managers)**

|  |  |
| --- | --- |
| Name of Contact 1 |  |
| Position/Job Title |  |
| Contact Number/s |  |
| Email Address |  |

|  |  |
| --- | --- |
| Name of Contact 2 |  |
| Position/Job Title |  |
| Contact Number/s |  |
| Email Address |  |

**iii) Organisation Financial Viability**

* Please enclose a copy of your organisation’s audited accounts for the last financial year

**iv) Current Provision**

Please outline the main programmes/projects delivered by your organisation and outline how they might complement/link in with delivery of the National Careers Service, where appropriate

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| **Area of Specialism** *(Are there specific groups you focus on and / or have experience with)* |
|  |

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| **Please outline three relevant programmes/projects delivered by your organisation in the last three years.****Links to National Careers Service** |
| **Project / Programme** | **Client** | **Contract Value** | **Brief Description** | **Targets** | **Performance Against Targets** |
| *Example* | *ESFA* | *£280,000* | *To support young people in yr11 to sustain their educational placement and take GCSE in English and Maths* | *Starts 100%**Retention 85%**Attendance above 80%**Completed English and maths exams 70%**Achieved C or above 50%* | *Starts 100%**Retention 87%**Attendance - 83%**Completed English and maths exams 65%**Achieved C or above 58%* |
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|  |  |  |  |  |  |

**Section B – Policies and Procedures**

|  |
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| **HEALTH, SAFETY AND SAFEGUARDING** |
| i) Does your organisation have a current ***Safeguarding and Prevent Policy / Procedure*** | Yes [ ]  No [ ]  |
| If yes, please attach Copy of your ***Safeguarding and Prevent Policy / Procedure*** a) Date policy due to be checked / updated: |
| ii) Does your organisation have a current ***Health and Safety Policy*** | Yes [ ]  No [ ]  |
| If yes, please attach Copy of your ***Health and Safety Policy*** a) Date policy due to be checked / updated: |
| **INSURANCES** |
| i) Does your organisation have a current ***Certificate of Employers Liability Insurance*** | Yes [ ]  No [ ]  |
| If yes, please attach Copy of your ***Certificate of Employers Liability Insurance***a) Date Insurance due to be checked / updated: |
| ii) Does your organisation have a current ***Professional Indemnity Insurance*** | Yes [ ]  No [ ]  |
| If yes, please attach Copy of your ***Professional Indemnity Insurance***a) Date Insurance due to be checked / updated: |
| **MATRIX STANDARD ACCREDITATION** |
| i) Does your organisation hold a current ***matrix*** standard accreditation | Yes [ ]  No [ ]  |
| If yes, please attach Copy of your ***matrix*** certificatea) Date ***matrix*** re-accreditation is due: If no, please confirm the expected date of your matrix assessment visit:b) Date ***matrix*** re/assessment visit is scheduled: |
| **CYBER ESSENTIALS PLUS** |
| i) Does your organisation hold a current ***Cyber Essentials Plus*** Certification | Yes [ ]  No [ ]  |
| If yes, please attach Copy of your ***Cyber Essentials Plus*** *c*ertificatea) Date ***Cyber Essentials Plus*** re-accreditation is due: If no, please confirm the expected date of your ***Cyber Essentials Plus*** renewal:b) Date ***Cyber Essentials Plus*** re/assessment is due: |

**Section C – Staff Information**

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| **STAFF INFORMATION** |
| Please provide details of all staff member/s who would be involved in the delivery of this service: |
| **Name** | **Job Title** | **Direct delivery of the service (Y / N)** | **Administrator / Compliance Staff Member (Y / N)** | **IAG Level 4 qualified** **(advisers) Y / N** | **IAG Level 6 or above qualified (advisers) Y / N** | **Enrolled / Working Towards on L4 or L6 Training (advisers) Y / N** | **Safeguarding Lead****/ Designated****Person (Y / N)** | **Equality Lead****(Y / N)** | **Copies of certificates attached (Y / N)** |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]   No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]   No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |

|  |
| --- |
| **STAFF INFORMATION** |
| Please provide details of all staff member/s who would be involved in the delivery of this service: |
| **Name** | **Job Title** | **Direct delivery of the service (Y / N)** | **Administrator / Compliance Staff Member (Y / N)** | **IAG Level 4 qualified** **(advisers) Y / N** | **IAG Level 6 or above qualified (advisers) Y / N** | **Enrolled / Working Towards on L4 or L6 Training (advisers) Y / N** | **Safeguarding Lead****/ Designated****Person (Y / N)** | **Equality Lead****(Y / N)** | **Copies of certificates attached (Y / N)** |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]   No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]   No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |
|  |  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  | Yes [ ]  No [ ]  |

**Section D - Attachments/Checklist**

* Latest company accounts
* A copy of your Organisation Chart
* A copy of your Matrix Certificate
* A copy of your Safeguarding Policy/Procedure
* A copy of your Health and Safety Policy and Arrangements
* A copy of your Certificate of Employers Liability Insurance
* A copy of your Equality and Diversity Policy
* A copy of your Cyber Essentials Plus Certificate
* Copies of staff IAG qualification certificates / evidence of registration on a Level 4 IAG award

**Section E - Declaration**

**Standard Data Collection Form**

The General Data Protection Regulation 2017 requires Education Development Trust to provide you with certain information when you have provided it with personal data. ‘Personal data’ means information relating to an identified or identifiable living person.

Please read the following information carefully and, if you agree to the use of your personal data in the manner this form describes, please sign the statement below and return it to Education Development Trust at the address shown.

**Confirmation**

**I agree to the use of my personal data as described in this Standard Data Collection Form.**

**Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Please return this completed form to Education Development Trust at:

Name: Bobbie Black

Email: bblack@educationdevelopmenettrust.com

**Who are we?**

Education Development Trust is a registered charity and company limited by guarantee, incorporated in England and Wales. It is a ‘controller’ under the General Data Protection Regulation. Occasionally it will also act as a ‘processor’ and if we are acting as a processor then the controller will be listed below or provided to you orally or through email at the time of collection of the data:

Controller: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**What information will we collect from you?**

We will only collect information from you that is relevant to the circumstances in which we are working with you. In particular, we may collect the following information from you which is defined as ‘personal data’:

Personal details – name, address, contact details; Family, lifestyle and social circumstances; Financial details; Business activities; Training needs and details of past training; Education and employment details; Goods or services provided; lifestyle and social circumstances; visual images, personal appearance and behaviour; behaviour and standards of work or performance; time logs

You will be informed of any other data we collect orally or through email at the time of collection of the data.

We may also need to collect information that is referred to as being in a ‘special category’. This could include:

Racial or ethnic origin, disability information, marriage status, sexual orientation, mental or physical health, religious beliefs, trade union memberships, criminal convictions, political opinions

**How will we use your information?**

We may use your information to enable us, through our arrangements with you, to meet our charitable objectives through our various legitimate business concerns and commercial activities. In particular your data may be used to help us to provide education or services in the field of education or a similar field; training to our customers and clients; to promote and provide our services; to maintain our own accounts and records and to support and manage our employees, any of which may be necessary for the performance of any contract or arrangement between us. We may also use it for:

Administering any accounts; processing bank details for payment purposes; the prevention or detection of fraud; market research; marketing; Disclosure and Barring Service checks; credit reference checks

You will be informed of any other use of the data we collect orally or through email at the time of collection of the data.

**Who will we share your information with?**

We sometimes need to share the personal information we process with other organisations with whom we work to deliver the activities described under the paragraph “*How will we use your information?*” What follows is a description of the types of organisations we may need to share some of the personal information we process with for one or more reasons.

Business associates, clients, local authorities, charities; professional advisers; educators and examining bodies; current, past or prospective employers; family, associates and representatives of the person whose personal data we are processing; employment and recruitment agencies; financial organisations; credit reference agencies; debt collection and tracing agencies; suppliers and service providers; persons making an enquiry or complaint; other companies in the same group; central government; police forces, courts

You will be informed of any other data we collect orally or through email at the time of collection of the data.

**For how long will we keep your information?**

We will keep your information throughout the period of time that we work with you and for the duration of any project or association with us as part of which you provided the personal data, and for a period of six years from that point or until it is no longer necessary for us to hold the data.

**Will my data be transferred outside the European Economic Area?**

Our data servers or those which host our software are or may be located in the United States and so your data is likely to be transferred outside the EEA under contractual arrangements with the relevant companies providing those servers or hosting services.If you have provided data to us as part of a project that is being delivered by or with or that is linked to any of our overseas offices, then we may also need to transfer your data outside the EEA.

**What rights do you have?**

You have a series of rights under the General Data Protection Regulation including the right to access a copy of the information we hold about you, to have data we hold erased, to restrict the use of your data, to object to marketing use of your data, the right to withdraw consent to our processing of your data, rights concerning the portability of your data. Further information on this issue can be obtained from our Data Protection Officer at sclifton@educationdevelopmenttrust.com

**Who can you complain to if you are unhappy about what we have done with your information?**

If you are unhappy about how we are using your information then initially you should contact the Data Protection Officer and if your complaint remains unresolved then you can contact the Information Commissioner’s Office, details available at [www.ico.org.uk](http://www.ico.org.uk).