



Request for Tender AONTAS for Strategic Plan 2019-2022

Introduction

AONTAS is the Irish National Adult Learning Organisation. Since its foundation in 1969 AONTAS has a long track record of support for adult learners, practitioners and providers. As an umbrella body committed to advocating and lobbying for the development of a quality service for adult learners and promoting the value and benefits of lifelong learning, AONTAS works on behalf of its 500 strong membership and regards them as a key resource which provides the organisation with a grassroots, authentic understanding of adult and community education practice and learner perspective. The membership profile comprises a rich mix of statutory, voluntary and community organisations involved in the provision of further education and training, as well as individuals who are deeply involved in and committed to the concept and practice of lifelong learning.

Our Purpose

The current AONTAS Strategic Plan centres on: Advocating and lobbying for the development of a quality service for adult learners; promoting the value and benefits of adult learning and building organisational capacity. With particular emphasis on those who did not benefit from education initially or who are under-represented in learning, AONTAS' work is aimed at: Widening participation in lifelong learning; Ensuring community education is supported to offer quality learning opportunities to the most educationally disadvantaged; Ensuring adult learners are central to local, regional, national, European and International adult learning policy; promoting quality adult learning.

AONTAS Membership Services

1. Policy, Research and Representation

Responds to member issues, makes policy submissions, publishes evidence-based policy papers and hosts policy events with stakeholders, policy makers and politicians.

2. Peer-reviewed Academic Journal

Provides secretariat, chairs editorial board, and publishes the only Irish Journal of Adult and Community Education – *The Adult Learner*

3. Community Education support, advocacy and continuous professional development

Supports community education for the past 10 years through the 100+ member strong, nationally recognised structure – the *AONTAS Community Education Network*

4. Promotion and Recognition

Organises the AONTAS Adult Learners' Festival: promotes lifelong learning nationally, supports member events, recognises excellence in adult learning provision through the STAR awards and hosts a policy event.

5. Builds a national lifelong learning network

Hosts membership meetings, informs members through social media, member letters, and a bi-weekly e-bulletin.

6. European Activities

Leads and participates in strategically significant ERASMUS+ programmes and extends opportunities to members. ERASMUS+ key action programmes include: KA1 mobility CPD programme for adult learning practitioners; KA2 and KA3 as national coordinator for the European Agenda for Adult Learning (EAAL).

7. Learner Voice

Supports learners to engage in advocacy at all levels: share issues, publish stories, participate or speak at events, advocate to policy makers and politicians at national and EU level. Leads and delivers the National FET Learner Forum as part of the FET Strategy.

8. Information to prospective learners

Offers a OneStepUp information referral service: Freephone, website and through publication of OneStepUp booklet, open day campaigns and participation at regional fairs.

Context

In 2019, AONTAS will celebrate its 50 year anniversary and will launch and adopt a new AONTAS Strategic Plan (2019 - 2021) at the AGM in May 2019. In preparation for developing the new Strategic Plan, there are a number of considerations.

Firstly, AONTAS has undergone a large range of reviews ranging from branding, projects, as well as organisational and at board level during 2015, 2016, 2017 and 2018. With each review there is a wealth of information available regarding discussions on the vision and purpose of the organisation and many aspects of AONTAS work. This information can form part the basis of the strategic plan discussion documents. Secondly, and importantly, a key point with the strategic plan consultation process is the central involvement of the current and new Board who will be elected in November 2018. In order for the plan to be

responsive and authentic, it is essential that the new Chairperson and new Board members also have ownership of the process. The one-year timeframe for completion of the Strategic Plan covers the consultation process, direction by the Board (current and future), final approval by the Board and publication.

Requirements

Our current Strategic Plan is coming to an end in December 2018, and we are now seeking a Consultant(s) to support the development of a new plan for the next three years from 2019 to 2022. It is envisaged that the new strategic plan will need to include vision, mission, goals, objectives and clear measures of success, target groups, target areas, strategic approaches and activities/projects.

Timeframe and Process

It is envisaged that the successful tenderer will deliver the proposed outline of work during the period of late June/July 2018 to January 2019:

1. Review previous strategic plans and actions achieved
2. Synthesise all relevant information available from aforementioned AONTAS reviews
3. Develop a scoping document of the AONTAS landscape for the CEO/AONTAS Board including a proposed cross-organisational approach to stakeholder consultation in conjunction with the AONTAS CEO/leadership team
4. Facilitate a consultation session with AONTAS Board and the AONTAS leadership team
5. Develop an AONTAS membership discussion document
6. Initiative stakeholder one-to-one interviews (approx. 10) in July/August/September
7. Develop online AONTAS membership consultation questions and collate responses
8. Document outcomes of Autumn regional meeting/focus group consultation with CEO
9. Document a synthesise of all membership consultation responses
10. Prepare draft Strategic Plan for member feedback at EGM (November)
11. Finalise the Strategic Plan (by January 2019)
12. Make three presentations to AONTAS Board
 - I. Summary of stakeholder consultation
 - II. Review of regional membership consultation
 - III. Facilitate discussion on final draft Strategic Plan at Board Meeting (new Board and existing Board) (December)

Ethics and Values

We expect the successful tenderer to adhere to AONTAS' values and to follow any of our policies which are deemed appropriate.

Accountability and Management

The contract for services rests with AONTAS. The primary point of contact for the successful tenderer will be Niamh O'Reilly, CEO, AONTAS.

The successful tenderer will be expected to:

- Maintain regular contact with the CEO, responding to communications in a timely manner
- Be flexible and responsive to the needs of the organisation as they arise
- Be proactive in seeking clarification, information or guidance as needed

Timeframe and Deliverables

We expect the successful tenderer to:

- Commence the strategic planning process in late-June 2018
- Provide regular progress updates to the CEO
- Provide a draft strategic plan in October 2018
- Produce the final strategic plan by January 2019

Competency and expertise requirements

The successful tenderer will:

- Have a proven track record of inclusive strategic planning
- Have experience of working with membership organisations
- Demonstrate an understanding of and have experience working with NGOs/social justice organisations
- Ability to synthesise a large range of information methodically but also have a flexibility of approach to strategic planning consultation
- Provide details of relevant experience and qualifications in delivering on all aspects of the tender, and provide two referees associated with examples of two most appropriate pieces of work

Tender Requirements

Tenders for this work must include:

1. Name of applicant / organisation name, address and contact details. In the case of consortia, please assign one person / organisation as the principal contact
2. A statement outlining the understanding of the brief (max 1000 words)
3. Personnel involved – details of all personnel who will be involved, including a CV which outlines their qualifications/experience
4. Description of proposed project approach, methodology, actions and timeframe (max. 1500 words)
5. Examples of two relevant previous projects along with a separate referee, including contact details, for each project
6. Costs – detailed per day cost and any associated costs, including VAT
7. Notification of any potential conflicts of interest
8. An up to date copy of the tenderer's Tax Clearance Certificate and relevant insurances.
9. Signed Declaration (Appendix 1)

Evaluations of tender submissions will be based on criteria specified in the tender requirements, using the following award criteria:

No	Requirements / Criterion	Weighing Criteria
1	Understanding the Brief	20%
2	Relevant Knowledge, Expertise, Experience, Project Management and Resources Allocated	40%
3	Content and Quality of Proposed Plan and Methodology	20%
4	Cost	20%
	Total marks	100

Minimum scoring required for requirements/criterion is 60% for each

Tenderers must achieve a minimum score of 60% of the total marks available for each of the individual qualitative criteria (1-3). Any Tender which does not meet this minimum threshold shall be excluded from further consideration.

The lowest cost tender which also meets all of the minimum requirements of the qualitative award criteria, will receive the maximum score achievable under this criterion. The scores of the other valid Tenders will be calculated by using the following formula: Number of marks = the cost of the lowest valid tender divided by the cost of the valid tender in question and multiplied by the maximum score achievable.

1. Understanding the brief

Those tendering should demonstrate in their proposals a good understanding of the brief and issues which this strategic plan is seeking to address, including an excellent understanding of issues relating to strategic planning, NGOs, preferably adult learning and issues relating to educational equality.

2. Relevant knowledge, expertise, experience and resources allocated

The highest scores will be awarded to the tenderers with the most appropriate knowledge and experience in delivering similar projects. The tenderer must supply a CV of the person who will be carrying out the work.

3. Content and quality of proposed plan and methodology.

This refers to the proposed approach to the design and development given the content in this Request for Tender. Tenderers must demonstrate their capability to bring the contract to a satisfactory conclusion by describing the methodology of approach to accomplish the project's required outcomes within the stated timeframe.

4. Cost

This must include all costs and expenses for the work. Quotations should be inclusive of VAT, and should be quoted in Euro. All prices quotes must remain valid for the duration of the work.

Following completion of the tender evaluation, the successful tenderer will be notified in writing. Once the offer is accepted, letters will be issued to the unsuccessful tenderer/s notifying them of the result.

A tender assessment panel is in place to assess the applications and to award the contract to the successful tenderer. The panel will have to be satisfied that the method and programme of work meet the requirements outlined and are cost effective. The panel does not commit itself to accepting the lowest tender and will not accept any responsibility for any expenses incurred in the preparation and submission of a tender. The panel may cancel the process at any time. AONTAS will not engage in any discussions or negotiations in advance of adjudication. AONTAS is not in a position to provide feedback on unsuccessful tenders.

Budget and schedule of payments

The maximum budget for this strategic plan is €12,000 (inclusive of VAT). The price will be inclusive of all expenses, travel, subsistence and administration. AONTAS will not make any payments other than the price in the quotation response document. A payment schedule will be agreed with the successful tenderer prior to the commencement of the work based on project deliverables.

Any quotations exceeding this amount will not be evaluated and will be eliminated from the process. Quotations with lower pricing will receive a proportionally higher score under the award criteria total cost.

Shortlisting and Clarification Meetings

A shortlist of the most competitive applicants may be invited to present or provide further information on their bid prior to selection. An invitation to interview is not an indication that a contract has been awarded. Applicants attending such interviews will do so at their own expense.

Tax Clearance Certificate

Before the contract is awarded, the successful tenderer will be required to produce a valid Tax Clearance Certificate, and if the certificate should expire within the course of the contract, a new certificate will be required. All payments under the contract will be conditional on the person/organisation being in possession of a valid certificate at all times.

Insurance

The successful tenderer must produce evidence of professional indemnity and car insurance as part of the tender submission and this cover needs to be in place for the duration of the contract for work.

Conflicts of Interest

Any conflicts of interest involving a tenderer must be fully disclosed to AONTAS. Failure to disclose a conflict-of-interest may disqualify a bidder or invalidate an award of contract, depending on when the conflict-of-interest comes to light. If no conflict of interest exists, tenderers must indicate that in the declaration form, enclosed in Appendix 1.

Ownership of Material Resulting from this Work

AONTAS will retain ownership of any research, materials and/or documentation resulting from the development of the strategic plan. All research, materials and/or documentation must be returned to AONTAS on request or in the event that the contract is terminated. No part of the research, materials and/or documentation may be used without the prior consent of AONTAS.

Closing Date for Receipt of Tender

The closing date for receipt of one signed paper copy of the tender and an electronic copy to AONTAS is **12 noon on Friday the 29th June 2018**. Any tenders received after this time and date will not be considered for adjudication. Please leave enough time for postage and emailing in order to meet the deadline. Any discrepancy found between the electronic and paper copy may mean the tenderer is disqualified from the adjudication.

Tender Submissions Should be Addressed to:

Niamh O'Reilly, CEO, AONTAS, AONTAS, National Adult Learning Organisation, 2nd Floor, 83-87 Main Street, Ranelagh, Dublin, D06 E0H1. noreilly@aontas.com.