

# CARERS TRUST



## LEARNING AND DEVELOPMENT TENDER CARERS TRUST

Our people's development is a strategic  
focus

### **Context**

*Every single person at Carers Trust has a special role to play in the delivery of our new strategic direction and our people's development is a key pillar of that new direction*

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# Carers Trust Learning & Development Offer: Invitation to Tender (June 2022)

## Introduction

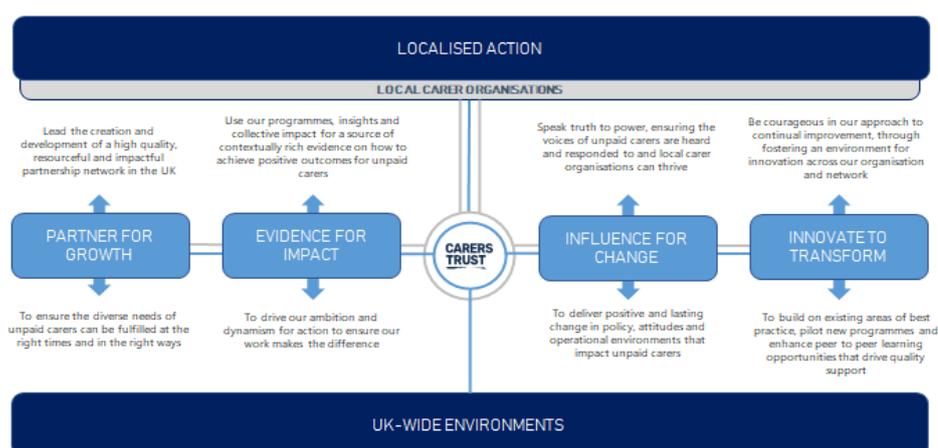
Carers Trust is inviting suitable applicants to tender to design Carers Trust Learning & Development (L&D) offer that includes:

- The development of a tailored Leadership Development programme for its senior team based on the needs of the current cohort.
- The design and implementation of a tailored Leadership Development programme.
- The design and development of a values-based core L&D curriculum for Managers and aspiring Managers.

In this brief we have provided an indicative three-phased approach to achieve the above aims; **we welcome and are open to discussing different approaches based on your consultancy expertise and experience in this space.**

## About Carers Trust

Carers Trust works to transform the lives of unpaid carers across the UK. We partner with our network of local carer organisations to provide funding and support, deliver innovative and evidence-based programmes, and raise awareness & influence policy. Our vision is that unpaid carers are heard and valued, with access to support, advice, and resources to enable them to live a life alongside caring.



## Learning & Development: a strategic focus

Whilst Carers Trust is extremely proud of its current impact, it acknowledges that there is a significant way to go if we are to effectively support the ever-changing

unpaid carers landscape. There are a number of significant factors for leadership development becoming an urgent strategic priority at Carers Trust.

- The global pandemic has led to an unprecedented shift to remote working, which is likely to continue and evolve to hybrid (on site/off site working). 26% of Carers Trust staff today started during the pandemic and are only beginning to meet colleagues in-person. Whilst remote working has many productivity benefits – it has also influenced the way we communicate and build new relationships, and how we inspire, manage and lead teams.
- In line with our ambition for continual improvement, we are about to embark on our refreshed strategy for *Building a Caring Society 2022-25*. The strategic development process (undertaken September 2021 – March 2022) has highlighted some fundamental changes to the way we will work in the future. The strategy refresh includes the development of new strategic priorities and a refreshed set of values and behaviours.

### **Learning & Development activity in the last 12 months**

In the past 12 months, we have made limited investment into L&D

- For all staff - there was an investment of £10,000 in the purchase of LinkedIn learning and 70 individual licenses. The platform contains a library of 16,000+ courses. These insights give us a unique and real-time view of how jobs, industries, organisations, and skills are evolving. These insights also fuel course recommendations that connect our people learners to the most relevant, applicable learning that is easy to engage with on any device.
- For the Executive team - there has also been an investment of £30,000 with Trusted Executive, an executive development programme which revolved around the Nine Habits of Trust. This offer is now being reviewed before committing to longer-term development programme.

## **Our People**

The new Learning & Development offer for Carers Trust staff, must take into consideration the profile of our workforce, which has the following key characteristics. Further equalities data will be provided to the successful consultant/consultancy:

### **Gender**

We are predominantly female, which is not unusual in the charity sector.

Female	76%
Male	21%
Prefer not to say	3%

## Age

We have an equal age distribution between ages 25 – 64.

18-24	5
25-34	14
35-44	16
45-54	16
55-64	13
65+	1
Prefer not to say	1

## Sexual Orientation

We are predominantly heterosexual.

Heterosexual	52
Gay or Lesbian	9
Bisexual	4
Prefer not to say	4
Other	1

## Senior Leadership by role and tenure

Our leadership team are a mix of new colleagues and colleagues who have been in the organisation for over 5 years.

Directorate	Role	Length of Service
Corporate Services	Head of People and Culture	1 Year 3 Months
Corporate Services	Head of Finance	1 Year 4 Months
Corporate Services	Head of ICT	17 Years 7 Months
Corporate Services	Exec Director of Corporate Services	4 Years 7 Months
Fundraising	Head of UK Fundraising	1 Year
Fundraising	Head of Partnerships and Philanthropy	5 Months
Fundraising	Exec Director of Fundraising	4 Years 1 Month
Programmes and Impact	Head of UK Network Development	3 Years 8 Months
Programmes and Impact	Head of Grants and Programmes	13 Years 4 Months
Programmes and Impact	Head of Young and Adult Carers	2 Years 4 Months
Programmes and Impact	Exec Director of Programmes and Impact	1 Year 3 Months
UK Policy & External Affairs	Head of External Affairs Wales	6 Months
UK Policy & External Affairs	Head of Policy and External Affairs	7 Years 4 Months

UK Policy & External Affairs	Head of External Affairs Scotland	7 Years 11 Months
UK Policy & External Affairs	Exec Director of UK Policy and External Affairs	11 Months
UK Policy & External Affairs	Head of Communications and Marketing	3 Years 6 Months
UK Policy & External Affairs	Director for Scotland	17 Years 9 Months
UK Policy & External Affairs	Director for Wales	8 Years 10 Months

## Performance Management process

We operate a six monthly and end of year appraisal process backed up with a regular one to one meeting structure currently being aligned to the new values and behaviours.

The appraisal process covers current objectives, values check in, personal development and future objective setting for the individual. **Currently we are collating the outputs from the end of year appraisal for 2021 and will have a significant amount of development needs to address mid-July 2022.**

## Our requirements and scope of work

The time is right for Carers Trust to invest in its L&D offer, and in particular its Leadership Development programme. **We are looking for a high-quality L&D specialist consultancy to support us with the end-to-end development of our new L&D offer for all staff as well as a bespoke Leadership Development programme for our senior team.**

We see the scope of our work as potentially taking place over three phases, which will consist of a mix of 1:1 and group training activities, as well as in-person and online learning.

### Suggested phasing as follows:

- Phase 1: Diagnostic of individual leadership capability
- Phase 2: Design and implementation of a Leadership Development programme
- Phase 3: Design and development of a values-based core L&D curriculum for Managers and aspiring Managers

## Phase One: Diagnostic of individual leadership capability

This phase will help us **understand our individual strengths and capabilities**, so each of us can realise our full leadership potential individually, and collectively as a team.

We currently have little understanding of the capability requirements of the leadership group to inform a wider development programme, that will ultimately help us to deliver a new three-year strategy.

We have a standard appraisal process that gives our line managers the opportunity to discuss development, but it is not supported by any insight other than the view of the individual and the Manager.

To really delve into capability, we need to have a process in place that is consistently applied across the group and is focused on building self-awareness, identifies key strengths, areas of development and motivations and career drivers. Having this level of intelligence will help us to:

- Identify areas of strength and deploy our resources more intelligently.
- Strengthen the development conversations through our performance process.
- Focus development where it is needed.
- Engage and buy in leadership to a program that is based on building their awareness of their own development needs.

### Proposed activities

- After completing a series of online psychometric assessments (suggestions below), each leadership team member will receive detailed 1:1 feedback from a coach who has experience using the below tools.
- The coach and the individual then agree a report which will be owned by the leader and shared with their line manager.
- An initial group session to bring the leadership team together and understand how their capabilities complement each other as a team will also be included in Phase One.

As we anticipate new senior hires over the coming year, this activity must also consider how new leadership colleagues in future years will benefit from this offer.

### **Possible Psychometric assessments tools (it is not anticipated that all are deployed):**

- Clifton Strengths - surfaces your natural talents that when deployed, energise you and make you strong.

- Career Drivers - explores why you come to work.
- PROPHET - identifies your natural workplace preferences in motivation and decision-making styles.
- GC Index - shows how you choose to engage with the organisation to drive innovation and change (Game changer)].
- KF Assess – Professional Development Solution.
- Possibly backed up with a 360.

**Learner Outcome:**

Each of person will emerge with a clear understanding of “what they do when they are at their best” (key strengths) so that they can do more of this, more of the time. As a leader they will increase their effectiveness in delivering business results and focuses energy on the two or three things that will make the biggest positive impact going forward.

**Organisational Benefit:**

- Individualised development plan per leader and team.
- Opening conversation and ongoing development within the 1:1 process (performance).
- Growing self-awareness of the Leadership team’s individual and collective strengths and areas for development.

**Phase Two: Design and implementation of Leadership Development programme**

This phase follows the diagnostic phase. Once each person has a clearer understanding of their areas of focus for development, and there has been an initial group session on the leadership team’s skills and capability profile, we anticipate a more focused development programme for the group that again consists of 121 and group activities in-person and online.

**Possible activities**

- Small group activities to focus on people’s “preference” in how they approach key leadership activities and behaviour (suggestions below):
  - Executing and taking action.
  - Relationship Building.
  - Influencing style.
  - Strategic thinking.
  - Decision making.
- 1:1 L&D plan to a wider suite of values-based training that may include our existing LinkedIn Learning, as well as additional potential training tools and courses for Carers Trust to consider as part of our L&D offer.

### **Learner Outcome**

- Each person and the team will emerge with a clear development plan designed to build their effectiveness in delivering business results and focuses energy on the two or three things that will make the biggest positive impact going forward.
- The development plan will map to the L&D values-based curriculum (Phase Three activity).

### **Organisational Benefit:**

- A core leadership development plan for existing, new, and emerging leadership, aligned to our values and behaviours that embeds coaching within the team.
- Delivery of a blended development programme developed informed by insight into the capability needs of the leadership group that has clear signage to how it can be accessed.

## **Phase Three. Design and development of a values-base core L&D curriculum for Managers and aspiring Managers**

The proposed third phase of our L&D requirements is the development of a core L&D curriculum for **all our people** aligned to the new strategy priorities and aligned to our refreshed Values and Behaviour framework.

- The L&D curriculum will be a written document for all staff interested in developing their current skills and/or growing their management skills, with clear signposting to how the training can be accessed.
- The new curriculum will be the foundation programme for all new management staff and should be available to all staff through our standard appraisal process.
- The curriculum will link to training provided by LinkedIn Learning, our in-house subject specialists or other training providers (to be identified as part of this brief).
- We envisage this activity as running alongside Phase One and Two, not sequential - but are open to advice from consultants.

It will be compulsory for existing and new people managers, and those who have been identified through their appraisal as future or aspiring managers to complete the training signposted in the L&D curriculum.

## Our Values and Behaviours framework

Value	Engaging	Leading	Creating
<b>Courageous</b>	This is about sharing my ideas and new ways of working with my line manager	This is about encouraging and supporting my team members to try out new ideas without fear of failure or criticism	This is about creating a culture of trying new things and learning from mistakes
	This is about discussing when things don't go as planned	This is about taking action to resolve problems	This is about creating a culture of feedback in a supportive and constructive way
	This is about speaking up when people don't live the Carers Trust values and role modelling the values	This is about having the courage to call out misaligned behaviours and encouraging my team to do the same, and role modelling the values	This is about being open to challenge about my own behaviour and role modelling the values
<b>Trusted</b>	This is about looking for opportunities to collaborate with other teams	This is about being a role model for working in a collaborative way with my peers and encouraging that in my teams	This is about setting unifying goals and removing barriers, silos and building a mindset of cooperation and collective success
	This is about sharing my hopes, fears, and concerns with my line manager	This is about responding positively to views different from my own	This is about giving people the space and autonomy to shape their role in the way they think is most effective
	This is about taking the time to really get to know people inside and outside of my team	This is about building high trust relationships with my team and my leadership colleagues	This is about being visible and taking the time to get out and about and engage and build trust with everyone across Carers Trust
<b>Inclusive</b>	This is about encouraging	This is about taking a personal and	This is about being open about my

	colleagues by giving positive feedback and being warm and welcoming to everyone	genuine interest in all my team members development and well-being	vulnerabilities where appropriate so people can relate to me on a personal level
	This is about listening, and asking questions, to really understand other people's perspectives	This is about treating everyone as an individual and providing the support they may need	This is about creating and supporting a culture where every team member at Carers Trust feels like they belong and valued for their uniqueness.
	This is about recognising my personal responsibility to help build and sustain an inclusive environment at Carers Trust	This is about creating and supporting an environment where everyone feels safe to speak up in my team	This is about leveraging the thinking of diverse groups for smarter ideation and decision making both internally and externally

### **Learner outcome**

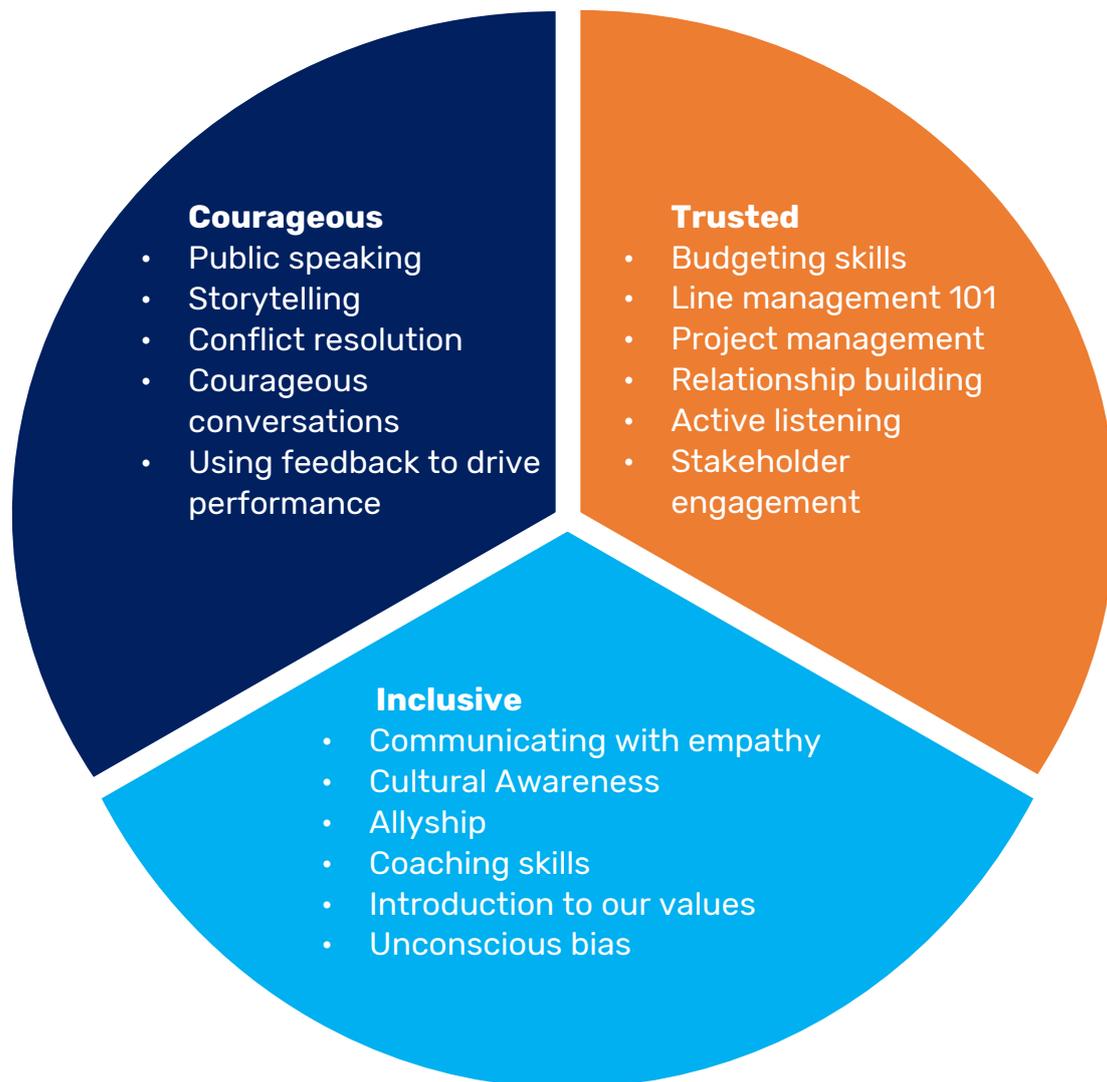
Development plans aligned to the current learning needs of the staff team underpinned by Carers Trust appraisal process.

- Utilising the new values and behaviours to embed new ways of working.
- Informed by the new strategic direction and new capabilities to build on a core programme of development activity.
- That our people are personally engaged, and the programme captures each person's attention, embedding a learning culture that leads to effective and lasting change.

### **Organisational Benefit:**

- A learning curriculum aligned to our new strategic direction and new capabilities aligned to our new values and behaviours.
- Delivery of a blended development programme that builds on our current learning management system (LinkedIn Learning) and has clear signage as to how it can be accessed by the teams.

A key component of our learning offer is a branded management development offer which is designed to do the basics well and aligned, to our values and new behaviours. Below is a **an example** of a management/staff development aligned to our new values.



## How to apply

Carers Trust is looking for a leadership consultant/consultancy who have a proven track record of undertaking the activities we described in our brief, which includes:

- Track record of designing leadership and all staff development programmes that have led to impactful and lasting cultural change. This includes:
  - Facilitating psychometric assessments.
  - Delivering 1:1 and group coaching.
  - Expertise of delivering training in blended formats, in person, online and digital.
  - Design and development of organisational L&D curriculum.

- Knowledge and understanding of L&D in any sector, but can apply transferrable learning to Carers Trust context.
- Excellent communication and project management skills.
- Sufficient capacity to deliver a high-quality output, considering feedback received from project stakeholders, within the timescales outlined.

## Key deliverables

We will be guided by proposals, but we envisage a set of deliverables as described below, *as a minimum*, along the lines of the proposed phasing.

### Phase One

- x17 individual packages of psychometric tests + facilitation.
- x17 90mins 1:1s with leadership coach (online).
- x17 bespoke reports.
- 1 group session (in person).
- Overview report of Carers Trust leadership capability to Carers Trust Head of People & Culture and CEO.

### Phase Two

- 6-8 group sessions (mix of online and in person).
- x17 45mins 1:1s.

### Phase Three

- Written L&D curriculum that is bespoke to Carers Trust values (that links to LinkedIn Learning and other training to be identified).
- Accompanied guided reading list that curates leading articles and free content from the internet.
- Recorded webinar on how to use curriculum.
- 2 small group sessions for managers and aspiring managers on 'Introduction to Leadership; Key skills to master' (suggested focus).

## Key target dates

- Submission deadline **1 August 2022.**
- Shortlisting questions and clarifications **early August 2022.**
- Notification of outcome **mid-August 2022 .**
- Inception meeting with Head of People & Culture to agree final approach **mid-August 2022 .**

- Project delivery:
  - Phase One window: **September – December 2022**
  - Phase Two window: **November – March 2023**
  - Phase Three window: **September – March 2023**

## **Budget**

Bids can be submitted for up to £65,000, inclusive of all costs and VAT. Carers Trust expects bids to demonstrate value for money and cost-effective work plans in submitted proposals.

## **Submitting your tender**

You must complete the following documents and return them in accordance with the instructions below. If you have any enquiries, please email [people@carers.org](mailto:people@carers.org) to arrange a conversation. All submissions should also be sent to this email address by midnight **1 August 2022**.

- A proposal of how you will meet Carers Trust requirements.
- A high-level project plan (Gantt Chart) with costings, timescales, and recommended delivery method for each of the interventions recommended.
- Details of similar previous L&D packages.
- Key personnel who are likely to be involved and their day rate.
- Details of any sub-contractors and their day rate.
- Two references that can be taken up if you are shortlisted.

## **Annex: Further information**

### **Our new Values descriptors**

**The following values will underpin the delivery of our strategic priorities.**

- **We are Trusted** - We work as a trusted partner working collaboratively and building genuine relationships with unpaid carers, Network Partners and supporters to deliver the services we say we will. We behave with integrity, transparency, and value everyone's contribution to our work
- **We are Inclusive** - We recognise and set a value on listening to the experiences of as diverse a group of unpaid carers, Network Partners and supporters as possible in helping us to meet the needs of unpaid carers in new and exciting ways and to shape services that are truly inclusive.
- **We are Courageous** - We speak up, challenge and act when we see an opportunity or when there is an injustice and want to enable unpaid carers, Network Partners and supporters to be bold, and seek out opportunities for us to work together to create effective change and suggest innovative ideas for improvements in what we do.