Hon Chris Hipkins

MP for Rimutaka

Minister of Education
Minister of State Services

Leader of the House
Minister Responsible for Ministerial Services

27 AUG 2019

Section 9(2)(a) [redacted]

Dear Section 9(2)(a) [redacted]

Thank you for your request for information received on 30 July 2019, in which you request, under the Official Information Act 1982 (the Act), the following information:

> *I request the documents as outlined in the Reply to Question 19344 (2019) below.*
>
> *Reply to 19344 (2019) has been answered*
>
> *Portfolio: Education (Minister – Chris Hipkins)*
>
> *Question: Has TEC, in 2019, requested expressions of interest, request for proposals or any other such contracting tools for the provision of Career services and if so what are the document dates and names ?*
>
> *Reply: The Tertiary Education Commission (TEC) is currently engaging in an ROI process for the provision of career planning tools. Document name: "Managed and Accessible Pathways System" issued 6/3/2019. TEC is also engaging in an RFP for Market Segmentation services. Document name: "Market Segmentation Research" issued 3/4/2019.*

I am releasing to you in full the two requested papers titled *Managed and Accessible Pathways System* issued 6 March 2019 and *Market Segmentation Research issued* 3 April 2019.

Under section 28(3) of the Act you have the right to complain to the Ombudsman about my decision.

Yours sincerely

Chris Hipkins
Minister of Education

Call for Registrations of Interest

Managed Accessible Pathways System (MAPS)

ROI released: Wednesday 6 March 2019

Deadline for Questions: 5pm (NZT) Friday 15 March

Deadline for Registrations: 5pm (NZT) Tuesday 26 March 2019

Level 9, 44 The Terrace
PO Box 27048
Wellington, New Zealand 6141
P +64 4 462 5200
www.tec.govt.nz

Contents

This opportunity in a nutshell

What we need

As a part of the Government's Careers System Strategy, we are looking to deliver an online career planning and pathway solution supported by an integrated suite of customer applications, tools and resources. The system will be for learners, job seekers, workers, educators and influencers aged 7 to 74, with a focus on those learners at key transition points.

The solution will enable users to explore their interests and aptitudes, and map through to potential careers. Seamless regional labour market information on needs and education pathways will be a key information function required for users. Aggregated information will be used to help identity new trends that will enable the Tertiary Education Commission (TEC) to provide new products and services to our users.

We are looking for an integrated solution with the ability to develop and integrate specific career planning applications (modules) as required in the future.

With this in mind, TEC is seeking responses from vendors who can partner with us to meet our requirements. Although the requirements give some direction, we are open to creative ways to address the requirements efficiently and effectively to help our users explore their interests and aptitudes.

What we don't want

Proposals from respondents who do not have the experience, capability or capacity to deliver the solution within timeframes.

Solutions that cannot be scaled or tailored to include future improvements, or those that will incur significant cost to build and support and where cost is prohibitive for any ongoing enhancements/changes.

What's important to us

We are seeking a solution to meet our requirements, delivered by a provider with a sound understanding of our requirements, alongside proven capability and experience, the capacity to meet the proposed timeframes and an effective operational support model. The solution must allow for rapid customer product development for TEC to respond to changing customer needs.

We are looking for a provider who wants to build a partnership and medium term relationship with TEC, where they demonstrate that our business is important to them.

In assessing any proposal we will be looking for:

- **Solutions** – your organisation has an existing solution that meets all or most of our requirements or has previously developed a similar solution.
- **Partnership** – willingness to work with us to deliver the proposed solution.
- **Capability** – your organisation's experience in delivering integrated, scalable solutions.
- **Capacity** – your organisation has the appropriate resources available to complete the implementation within the specified timeframes.
- **Fit with business requirements** – your proposed solutions meets the high level requirements and customer journey applications and supports our vision for an integrated platform that can be enhanced as needs arise.

A bit about us

The Tertiary Education Commission/Te Amorangi Mātauranga Matua (TEC) is the Government's careers and tertiary education investment agency. We invest approximately $3 billion in all forms of post-secondary school education across more than 700 of New Zealand's tertiary education organisations.

In the context of the Careers System Strategy, we are legislated to:

- provide a publicly available careers information service that includes a database of information about occupations and tertiary education and training. This is currently delivered as single applications and content on careers.govt.nz.
- facilitate and strengthen the connections between schools, employers and tertiary education organisations, to ensure students are better prepared for employment and further education and training.

SECTION 1: Key information

1.1 Context

a. This is an invitation to suitably qualified suppliers to submit a Registration of Interest for the Managed Accessible Pathways System (MAPS) contract opportunity.

b. This ROI is the first step in a multi-step procurement process. Following evaluation shortlisted Respondent/s will be invited to submit a full proposal in response to a Request for Proposals (RFP). This document deals only with the first step i.e. the ROI process.

c. Words and phrases that have a special meaning are shown by the use of capitals e.g. Respondent, which means '*a person, organisation, business or other entity that submits a Registration in response to the ROI. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Registration*.' Definitions are at the end of Section 4.

1.2 Our timeline

a. Here is our timeline for this ROI.

Step in ROI process:	**Date:**
Deadline for Questions from suppliers:	5pm 15 March 2019
Deadline for the Buyer to answer supplier's questions:	5pm 19 March 2019
Deadline for Registrations:	**5pm 26 March 2019**
Notification of shortlist:	by 8 April 2019
Shortlisted supplier presentations to buyer:	by 19 April 2019
Respondents notified of outcomes of the process	by 10 May 2019

b. All dates and times are dates and times in New Zealand.

1.3 How to contact us

a. All enquiries should be lodged through GETS.

b. **Our Point of Contact**

Name: Matthijs van Dijk

Title/role: Project Manager, Careers System Strategy

1.4 Developing and submitting your Registration

a. This is an open process. The ROI sets out the step-by-step process and conditions that apply.

b. Take time to read and understand the ROI. In particular:

i. develop a strong understanding of our Requirements detailed in Section 2.

ii. in structuring your Registration consider how it will be evaluated. Section 3 describes our Evaluation Approach.

c. For resources on tendering go to: www.procurement.govt.nz/for suppliers.

d. If anything is unclear or you have a question, ask us to explain. Please do so before the Deadline for Questions. Email our Point of Contact.

e. In submitting your Registration you must use the Response Form provided. This is a Microsoft Word document that you can download.

f. You must also complete and sign the declaration at the end of the Response Form.

g. Check you have provided all information requested, and in the format and order asked for.

h. Having done the work don't be late – please ensure you get your Registration to us before the Deadline for Registration!

1.5 Address for submitting your Registration

a. Responses should be submitted via GETS by

5pm Tuesday 26 March 2019

b. Responses sent by post or fax, or hard copy delivered to our office, will not be accepted.

1.6 Our ROI Process, Terms and Conditions

c. The ROIs is subject to the government's standard ROI Process, Terms and Conditions (shortened to ROI-Terms) described in Section 4. We have not made any variation to the ROI-Terms.

1.7 Later changes to the ROI or ROI process

a. If, after publishing the ROIs, we need to change anything about the ROIs, or the process, or want to provide suppliers with additional information we will let all suppliers know by placing a notice on the Government Electronic Tenders Service (GETS) at www.gets.govt.nz.

b. If you downloaded the ROI from GETS you will automatically be sent notifications of any changes through GETS by email.

SECTION 2: Our Requirements

2.1 Background

The Managed and Accessible Pathways system (MAPs) will support New Zealanders with individualised career pathways that allow them to identify, discuss and consider their interests and aptitudes, map them through to the acquisition of skills and connection to potential careers, and identify gaps and opportunities. We want users to be able to answer four important questions that shape their future: *Who am I? What do I want to be? How will I get there? And how will I succeed?*

MAPs will provide accurate and relevant information helps guide learning and work decisions.

The Managed and Accessible Pathways (MAPS) system is:

- a suite of information products, tools and resources to plan, manage and navigate individual pathways from schooling through to a career for all New Zealanders.
- accessible by all New Zealanders, with focused content and functionality for learners and "underserved" customer segments.
- based around five applications: interest discovery, skills and capability, qualification search, job search and pathways.
- linked through individual profiles and accessed through a new careers website.

The first release of the solution will be by October 2020. Further improvements to functionality and ongoing customer application will be released over three consecutive years.

2.2 What we are buying and why

In order to create this customer experience, we need a solution that allows us to buy, customise or build various applications that come together as one integrated solution for our users.

High level requirements

We have grouped our foundational requirements in six different areas and have outlined high level requirement queues for each area in Table 1. We are open to creative ways to address these requirements efficiently and effectively. The architectural principles have been created to assist with defining the overall architecture of the solution by ensuring that it is aligned with the agreed principles.

Table 1: High Level Requirements Matrix

Requirement Area	Requirement Statement
1. Customer UX/Design	The solution must have a browser-based user interface utilising advanced human centred design and user experience techniques. The applications within the solution must have a consistent look and feel.
	The solution must use mobile responsive design to adapt to a variety of user devices. Native mobile applications (iOS and Android) can be provided in addition to the responsive web application.

	The solution must allow for the customisation of customer facing content & design including the support for multiple languages.
2. Integrated Customer Journey	The solution must allow for information and data entered by a customer to be used by all relevant applications to avoid re-entry of customer data.
	The solution must allow an administrator to create and modify multiple (and branched) customer journey template/workflows that can be applied to different customer types that will enable the customer to be guided to their next steps in their journey.
3. Customer Account Management	The solution must provide the ability for a customer to log in and manage their account/profile. The solution should support a variety of 3rd-party identity providers.
	The solution must provide the ability for a school to create and manage the accounts of their students.
4. Customer Applications	The solution must provide a Customer Dashboard where they can view their application information, next steps and progress information.
	The solution must be able to add, modify and remove individual applications as required to meet customer demand.
	The solution must be able to support the customer application roadmap as outlined in Table 2 – High Priority Application Requirements.
5. Data Integration and Reporting	The solution must allow for data to be sourced from external sources via defined APIS.
	The solution must allow for data within the solution to be made available to TEC and other interested parties via defined APIs.
	The solution must allow for changes to fields of the data model based on TEC and customer needs.
	The solution must allow an administrator to report on application usage and customer interaction with the solution.
6. Architectural Principles	Customer First - deliver the best experiences to our customers using our products and services.
	Manageable / Supportable - ensure that solutions that are implemented are both manageable and supportable by TEC.
	Compliance to Law - information management processes comply with all relevant laws, policies, and regulations (e.g. privacy and records management).
	Proven Technology - the use of proven technology is preferred to ensure solutions are robust and meet the business needs.
	Interoperability - software and hardware should conform to defined standards that promote interoperability for data, applications, and technology.

	Fit for Purpose - create solutions that are fit for purpose without over-engineering them.
	SaaS before PaaS before IaaS before in-house - the use of cloud technologies should be preferred over in-house implementations with SaaS preferred over PaaS preferred over IaaS when using cloud.
	Separation of Concerns - solutions should be architected so that each component of the solution concentrates on a single concern and avoids trying to do too much.
	Reuse before buy before build - look to use off-the-shelf software to meet business needs and therefore are willing to adjust business processes to suit off the shelf tools.
	Security by Design - solutions will consider security from the start and ensure that it is a fundamental component of the architecture.

Customer Applications

The purpose of the solution is to support an integrated customer journey through applications (or capabilities with one or more applications). Our current state applications have been built as single/non-integrated modules on careers.govt.nz.

Table 2 outlines the specific, high priority customer facing applications that make up the integrated and personalised customer journey. Table 3 outlines potential future applications and is not required for this ROI however any existing applications or experience building similar functions within the solution will be considered an advantage.

Each of the applications will need to be available within the provided solution and makes up the complete customer experience.

Table 2: High Priority Application Requirements

Capability	Business Requirement
Interest Discovery	An interest discovery tool that can help lead a learner through the process of working out what interests them so they can explore those identified interests in more detail.
Job Search	An interactive Job Search function displaying job/occupation details where any age Learner, Worker or Job Seeker can explore a specific Job Definition, related Activities, Case Studies, Skills Requirements, Demand, any required qualifications, suggestions of experience opportunities.
Skills and Capabilities	A tool where some learners and all workers and job seekers will enter their list of job experiences and will be presented with a list of corresponding skills that they can then rank in terms of importance, passion and relevance.
Qualification Search	An interactive Qualification Search function and Qualification Detail Page where Learners, Workers or Job Seekers can explore specific Qualifications, related subjects, Case Studies, key statistics and provider information

Pathways	An interactive application where some learners and all workers and job seekers will be able to explore the skills, qualifications and jobs they could acquire to get from their current job to another job they are interested in.

Table 3: Potential Future Application Roadmap Requirements

Capability	Business Requirement
Interest Search	An interest detail application where a learner can find out more about a specific interest, explore the activities involved and move on to explore related job areas.
Job to School Subjects	A visual depiction of subjects for learners that relate to a specific job of interest that can be printed, emailed or shared with a trusted influencer.
Job/Skill Clusters	A job cluster model that will depict knowledge areas of common skills where some learners and all workers and job seekers will be able to explore how their own prioritised skills or interests are grouped
Research and Apply with Provider	The ability for a Learner, Job Seeker or Worker to link out to a qualification and provider which may include more information.
Research and Apply with Employer	The ability for a Learner, job seeker or worker to link out to an employer or job ad which may include more information.
Suggested Experience	The ability for a Learner to apply and/or link out to a list of experience opportunities and providers.

The Proposed MAPS Customer Journey

	Individual Profiling				
Customer's issue	***"How do I discover my key areas of interest?***	***"What skills do I have and what is the gap to those required in my area of interest?***	***"How could I get there – what are my options?***	***"What qualifications would I need, where could I get this?***	***"What jobs provide a stepping-stone OR what jobs can I get with my qualification?***
Tools/ applications	**Interest Discovery Application**	**Skills and Capability Application**	**Pathways Application**	**Qualification Search Application**	**Job Search Application**
Functionality	Narrows the Design process to interest areas	Reveals skills and capability req'd by interest OR skills based on experience or qual.	Details pathway to get skills, quals and jobs based on area of interest	Details quals, cost and locality based on interest and/or skills gaps	List jobs / occupations linked to quals, skills/industry
Solution	**Destination (s)**	**Skill gaps**	**Journeys**	**Education**	**Jobs**
Example	I have narrowed down my interests to Animal Care	I know what skills are required and the gaps I need to fill	I understand the type of qualification + experience required, potential income, and locations	I know what and where to study, and how much it could cost	I understand what jobs are available, and where
	New Website				

2.3 Multi-stage procurement process

On the basis of information provided through this ROI we will determine our further approach to market for the MAPS solution. We will advise all respondent of next steps at the appropriate time.

2.4 Indicative deliverable timeframe

The following are the indicative high level deliverables.

Description	Indicative date for delivery
ROI and potential further procurement process completed	September 2019
First set of custom applications deployed to the foundational platform and public release of MAPS	October 2020
Continuous deployment of enhancements and customer applications as per roadmap	2020-2023

SECTION 3: Our Evaluation Approach

3.1 Evaluation model

The evaluation model that will be used is weighted attribute (weighted criteria). This means that all responses that are capable of full delivery on time will be shortlisted. Responses which score highly will be shortlisted for later stages of procurement.

3.2 Pre-conditions

Each Registration must meet all of these pre-conditions. Registrations which fail to meet one or more will be eliminated from further consideration.

Respondents who are unable to meet all pre-conditions should conclude that they will not benefit from submitting a Registration.

Pre-condition	Details
Available on-site	The supplier must be on premise at TEC to assist with the requirements gathering phase as required.
Price	The supplier has submitted an indicative cost model for their proposed solution.

3.3 Evaluation criteria

Registrations which meet all pre-conditions will be evaluated on their merits according to the following evaluation criteria and weightings.

Criterion	Weighting
Experience delivering similar solutions	**35%**
• How well the response indicates that the supplier has a current solution in the market that meets all of our requirements or a solution that can be enhanced to meet all of our requirements. • How well the response indicates that the supplier has developed solutions that are of the same scale as our vision.	
Capability and Capacity to deliver solution	**30%**
• How well the respondent demonstrates the capability to deliver the solution and relevant experience. • How well the respondent demonstrates the capacity to deliver the solution such as the availability of experienced resources and ability to meet timeframes.	
Proposed Solution (fit for purpose)	**35%**
• How well the proposed solution meets the high level requirements as listed in Table 1. • How well the proposed solution adheres to the architectural principles as listed in Table 1.	

• How well the proposed solution meets the application capabilities listed in Table 2 and Table 3.	
Total weightings	**100%**

3.4 Scoring

The following scoring scale will be used in evaluating Registrations. Scores by individual panel members may be modified through a moderation process across the whole evaluation panel.

Rating	Definition	Score
EXCELLENT significantly exceeds the criterion	Exceeds the criterion. Exceptional demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. The Registration identifies factors that will offer potential added value, with supporting evidence.	**9-10**
GOOD exceeds the criterion in some aspects	Satisfies the criterion with minor additional benefits. Above average demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. The Registration identifies factors that will offer potential added value, with supporting evidence.	**7-8**
ACCEPTABLE meets the criterion in full, but at a minimal level	Satisfies the criterion. Demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource, and quality measures required to meet the criterion, with supporting evidence.	**5-6**
MINOR RESERVATIONS marginally deficient	Satisfies the criterion with minor reservations. Some minor reservations of the Respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**3-4**
SERIOUS RESERVATIONS significant issues that need to be addressed	Satisfies the criterion with major reservations. Considerable reservations of the respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**1-2**
UNACCEPTABLE significant issues not capable of being resolved	Does not meet the criterion. Does not comply and/or insufficient information provided to demonstrate that the Respondent has the ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**0**

SECTION 4: ROI Process, Terms and Conditions

Note to suppliers and Respondents

- In managing this procurement the Buyer will endeavour to act fairly and reasonably in all of its dealings with interested suppliers and Respondents, and to follow due process which is open and transparent.
- This section contains the government's standard ROI Process, Terms and Conditions (shortened to ROI-Terms) which apply to this procurement. Any variation to the ROI-Terms will be recorded in Section 1, paragraph 1.6. Check to see if any changes have been made for this ROI.
- Words and phrases that have a special meaning are shown by the use of capitals e.g. Respondent, which means '*a person, organisation, business or other entity that submits a Registration in response to the ROI. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Registration.*' Definitions are at the end of this section.
- If you have any questions about the ROI-Terms please get in touch with our Point of Contact.

Standard ROI process

Preparing and submitting a Registration

1. Preparing a Registration

a. Respondents are to use the Response Form provided and include all information requested by the Buyer in relation to the ROI.

b. By submitting a Registration the Respondent accepts that it is bound by the ROI Process, Terms and Conditions (ROI-Terms) contained in Section 4 (as varied by Section 1, paragraph 1.6, if applicable).

c. Each Respondent will:

   4 examine the ROI and any documents referenced in the ROI and any other information provided by the Buyer

   5 if appropriate, obtain independent advice before submitting a Registration

   6 satisfy itself as to the correctness and sufficiency of its Registration.

d. There is no expectation or obligation for Respondents to submit Registrations in response to the ROI solely to remain on any prequalified or registered supplier list. Any Respondent on such a list will not be penalised for failure to submit a Registration.

2. Respondents' Deadline for Questions

iii. Each Respondent should satisfy itself as to the interpretation of the ROI. If there is any perceived ambiguity or uncertainty in the ROI document/s Respondents should seek clarification before the Deadline for Questions.

iv. All requests for clarification must be made by email to the Buyer's Point of Contact. The Buyer will respond to requests in a timely manner, but not later than the deadline for the Buyer to answer Respondent questions in Section 1, paragraph 1.2.a, if applicable.

v. If the Buyer considers a request to be of sufficient importance to all Respondents it may provide details of the question and answer to other Respondents. In doing so the Buyer may summarise the Respondent's question and will not disclose the Respondent's identity. The question and answer may be posted on GETS and/or emailed to participating Respondents. A Respondent may withdraw a request at any time.

vi. In submitting a request for clarification a Respondent is to indicate, in its request, any information that is commercially sensitive. The Buyer will not publish such commercially sensitive information. However, the Buyer may modify a request to eliminate such commercially sensitive information, and publish this and the answer where the Buyer considers it of general significance to all Respondents. In this case, however, the Respondent will be given an opportunity to withdraw the request or remove the commercially sensitive information.

3. Submitting a Registration

a. Each Respondent is responsible for ensuring that its Registration is received by the Buyer at the correct address on or before the Deadline for Registrations. The Buyer will acknowledge receipt of each Registration.

b. The Buyer intends to rely on the Respondent's Registration and all information provided by the Respondent (e.g. in correspondence). In submitting a Registration and communicating with the Buyer each Respondent should check that all information it provides to the Buyer is:

3 true, accurate and complete and not misleading in any material respect

4 does not contain intellectual property that will breach a third party's rights.

c. Where the Buyer requires the Registration to be delivered in hard and soft copies, the Respondent is responsible for ensuring that both the hard and soft copies are identical.

Assessing Registrations

4. Evaluation panel

a. The Buyer will convene an evaluation panel comprising members chosen for their relevant expertise and experience. In addition, the Buyer may invite independent advisors to evaluate any Registration, or any aspect of any Registration.

5. Third party information

a. Each Respondent authorises the Buyer to collect additional information, except commercially sensitive pricing information, from any relevant third party (such as a referee or a previous or existing client) and to use that information as part of its evaluation of the Respondent's Registration.

b. Each Respondent is to ensure that all referees listed in support of its Registration agree to provide a reference.

c. To facilitate discussions between the Buyer and third parties each Respondent waives any confidentiality obligations that would otherwise apply to information held by a third party, with the exception of commercially sensitive pricing information.

6. Buyer's clarification

a. The Buyer may, at any time, request from any Respondent clarification of its Registration as well as additional information about any aspect of its Registration. The Buyer is not required to request the same clarification or information from each Respondent.

b. The Respondent must provide the clarification or additional information in the format requested. Respondents will endeavour to respond to requests in a timely manner. The Buyer may take such clarification or additional information into account in evaluating the Registration.

c. Where a Respondent fails to respond adequately or within a reasonable time to a request for clarification or additional information, the Buyer may cease evaluating the Registration and may eliminate the Registration from the process.

7. Evaluation and shortlisting

a. The Buyer will base its initial evaluation on the Registrations submitted in response to the invitation. This evaluation will be in accordance with the Evaluation Approach set out in the ROI. The Buyer may adjust its evaluation of a Registration following consideration of any clarification or additional information as described in paragraphs 4.6 and 4.7.

b. In deciding which Respondent/s to shortlist the Buyer may take into account any of the following additional information:

   1. the results from due diligence
   2. any matter that materially impacts on the Buyer's trust and confidence in the Respondent
   3. any relevant information that the Buyer may have in its possession.

c. The Buyer will advise Respondents if they have been shortlisted or not. Being shortlisted does not constitute acceptance by the Buyer of the Respondent's Registration, or imply or create any obligation on the Buyer to enter into negotiations with, or award a Contract for delivery of the Requirements to any shortlisted Respondent/s. At this stage in the ROI process the Buyer will not make public the names of the shortlisted Respondents.

8. Respondent's debrief

a. At any time after shortlisting Respondents, the Buyer will offer Respondents who have not been shortlisted a debrief. Each Respondent will have 30 Business Days from the date of offer to request a debrief. When a Respondent requests a debrief, the Buyer will provide the debrief within 30 Business Days of the date of the request, or the date the Contract is signed, whichever is later.

b. The debrief may be provided by letter, email, phone or at a meeting. The debrief will:

   a. provide the reasons why the Registration was or was not successful
   b. explain how the Registration performed against the pre-conditions (if applicable) and the evaluation criteria
   c. indicate the Registration's relative strengths and weaknesses
   d. explain, in general terms, the relative advantage/s of the shortlisted Registration/s
   e. seek to address any concerns or questions from the Respondent
   f. seek feedback from the Respondent on the ROI process.

9. Issues and complaints

a. A Respondent may, in good faith, raise with the Buyer any issue or complaint about the ROI, or the ROI process at any time.
b. The Buyer will consider and respond promptly and impartially to the Respondent's issue or complaint.
c. The Buyer and Respondent each agree to act in good faith and use its best endeavours to resolve any issue or complaint that may arise in relation to the ROI.
d. The fact that a Respondent has raised an issue or complaint is not to be used by the Buyer to unfairly prejudice the Respondent's ongoing participation in the ROI process or future contract opportunities.

Standard ROI conditions

10. Buyer's Point of Contact

a. All enquiries regarding the ROI must be directed by email to the Buyer's Point of Contact. Respondents must not directly or indirectly approach any representative of the Buyer, or any other person, to solicit information concerning any aspect of the ROI.

b. Only the Point of Contact, and any authorised person of the Buyer, are authorised to communicate with Respondents regarding any aspect of the ROI. The Buyer will not be bound by any statement made by any other person.

c. The Buyer may change the Point of Contact at any time. The Buyer will notify Respondents of any such change. This notification may be posted on GETS or sent by email.

d. Where a Respondent has an existing contract with the Buyer then business as usual communications, for the purpose of managing delivery of that contract, will continue using the usual contacts. Respondents must not use business as usual contacts to lobby the Buyer, solicit information or discuss aspects of the ROI.

11. Conflict of Interest

a. Each Respondent must complete the Conflict of Interest declaration in the Response Form. and must immediately inform the Buyer should a Conflict of Interest arise during the ROI process. A material Conflict of Interest may result in the Respondent being disqualified from participating further in the ROI process.

12. Ethics

a. Respondents must not attempt to influence or provide any form of personal inducement, reward or benefit to any representative of the Buyer in relation to the ROI.

b. A Respondent who attempts to do anything prohibited by paragraphs 4.10.a and d. and 4.12.a. may be disqualified from participating further in the ROI.

c. The Buyer reserves the right to require additional declarations, or other evidence from a Respondent, or any other person, throughout the ROI process to ensure probity of the ROI process.

13. Anti-collusion and bid rigging

a. Respondents must not engage in collusive, deceptive or improper conduct in the preparation of their Registrations or other submissions or in any discussions with the Buyer. Such behaviour will result in the Respondent from being disqualified from participating further in the ROI process. The Respondent warrants that its Registration has not been prepared in collusion with a Competitor.

b. The Buyer reserves the right, at its discretion, to report suspected collusive or anti-competitive conduct by Respondents to the appropriate authority and to give that authority all relevant information including a Respondent's Registration.

14. Confidential Information

a. The Buyer and Respondent will each take reasonable steps to protect Confidential Information and, subject to paragraph 4.14.c. and without limiting any confidentiality undertaking agreed between them, will not disclose Confidential Information to a third party without the other's prior written consent.

b. The Buyer and Respondent may each disclose Confidential Information to any person who is directly involved in the ROI process on its behalf, such as officers, employees, consultants, contractors, professional advisors, evaluation panel members, partners, principals or directors, but only for the purpose of participating in the ROI.

c. Respondents acknowledge that the Buyer's obligations under paragraph 4.14.a. are subject to requirements imposed by the Official Information Act 1982 (OIA), the Privacy Act 1993, parliamentary or constitutional convention and any other obligations imposed by the law. The Buyer will not be in breach of its obligations if Confidential Information is disclosed by the Buyer to the appropriate authority because of suspected collusive or anti-competitive tendering behaviour. Where the Buyer receives an OIA request that relates to a Respondent's Confidential Information the Buyer will consult with the Respondent and may ask the Respondent to explain why the information is considered by the Respondent to be confidential or commercially sensitive.

15. Confidentiality of ROI information

- For the duration of the ROI, to the date of the announcement of the Successful Respondent, or the end of the procurement process, the Respondent agrees to keep the ROI strictly confidential and not make any public statement to any third party in relation to any aspect of the ROI, the ROI process or the award of any Contract without the Buyer's prior written consent.

- A Respondent may disclose information relating to the ROI to any person described in paragraph 4.14.b. but only for the purpose of participating in the ROI. The Respondent must take reasonable steps to ensure that such recipients do not disclose Confidential Information to any other person or use Confidential Information for any purpose other than responding to the ROI.

16. Costs of participating in the ROI process

a. Each Respondent will meet its own costs associated with the preparation and presentation of its Registration and any negotiations.

17. Ownership of documents

i. The ROI and its contents remain the property of the Buyer. All Intellectual Property rights in the ROI remain the property of the Buyer or its licensors. The Buyer may request the immediate return or destruction of any or all ROI documents and any copies. Respondents must comply with any such request in a timely manner.

ii. All documents forming the Registration will, when delivered to the Buyer, become the property of the Buyer. Registrations will not be returned to Respondents at the end of the ROI process.

iii. Ownership of Intellectual Property rights in the Registration remain the property of the Respondent or its licensors. However, the Respondent grants to the Buyer a non-exclusive, non-transferable, perpetual licence to retain, use, copy and disclose information contained in the Registration for any purpose related to the ROI process.

18. No binding legal relations

1. Neither the ROI, nor the ROI process, creates a process contract or any legal relationship between the Buyer and any Respondent, except in respect of:
   a. the Respondent's declaration in its Registration
   b. the Respondent's statements, representations and/or warranties in its Registration and in its correspondence with the Buyer
   c. the Evaluation Approach to be used by the Buyer to assess Registrations as set out in Section 3, and in the ROI-Terms (as varied by Section 1, paragraph 1.6, if applicable)
   d. the standard ROI conditions set out in paragraphs 4.10 to 4.23
   e. any other matters expressly described as binding obligations in Section 1, paragraph 1.6.
2. Each exception in paragraph 4.18.a. is subject only to the Buyer's reserved rights in paragraph 4.20.
3. Except for the legal obligations set out in paragraph 4.18.a. no legal relationship is formed between the Buyer and any Respondent unless and until a Contract is entered into between those parties.

1. Elimination

i. The Buyer may exclude a Respondent from participating in the ROI process if the Buyer has evidence of any of the following, and is considered by the Buyer to be material to the ROI:
   i. the Respondent has failed to provide all information requested, or in the correct format, or materially breached a term or condition of the ROI process
   ii. the Registration contains a material error, omission or inaccuracy
   iii. the Respondent is in bankruptcy, receivership or liquidation
   iv. the Respondent has made a false declaration
   v. there is a serious performance issue in a historic or current contract delivered by the Respondent

vi. the Respondent has been convicted of a serious crime or offence

vii. there is professional misconduct or an act or omission on the part of the Respondent which adversely reflects on the integrity of the Respondent

viii. the Respondent has failed to pay taxes, duties or other levies

ix. the Respondent represents a threat to national security or the confidentiality of sensitive government information

x. the Respondent is a person or organisation designated as a terrorist by New Zealand Police.

2. Buyer's additional rights

i. Despite any other provision in the ROI the Buyer may, on giving due notice to Respondents:

   1. amend, suspend, cancel and/or re-issue the ROI, or any part of the ROI
   2. make any material change to the ROI (including any change to the timeline, Requirements or Evaluation Approach) on the condition that Respondents are given a reasonable time within which to respond to the change.

ii. Despite any other provision in the ROI the Buyer may:

   i. accept a late Registration if it is the Buyer's fault that it is received late

   ii. in exceptional circumstances, accept a late Registration where it considers that there is no material prejudice to other Respondents. The Buyer will not accept a late Registration if it considers that there is risk of collusion on the part of a Respondent, or the Respondent may have knowledge of the content of any other Registration

   iii. in exceptional circumstances, answer questions submitted after the Clarification Period ends

   iv. accept or reject any Registration, or part of a Registration

   v. accept or reject any non-compliant, non-conforming or alternative Registration

   vi. decide not to enter into a Contract with any Respondent

   vii. liaise or negotiate with any Respondent without disclosing this to, or doing the same with, any other Respondent

   viii. provide or withhold from any Respondent information in relation to any question arising in relation to the ROI. Information will usually only be withheld if it is deemed unnecessary, is commercially sensitive to a Respondent, is inappropriate to supply at the time of the request or cannot be released for legal reasons

   ix. amend the Proposed Contract at any time, including during negotiations with a shortlisted Respondent

   x. waive irregularities or requirements in the ROI process where it considers it appropriate and reasonable to do so.

iii. The Buyer may request that a Respondent agrees to the Buyer:

   a. selecting any individual element/s of the Requirements that is offered in a Registration and capable of being delivered separately, unless the Registration specifically states that the Registration, or elements of the Registration, are to be taken collectively

   b. selecting two or more Respondents to deliver the Requirements as a joint venture or consortium.

1. New Zealand law

a. The laws of New Zealand shall govern the ROI process and each Respondent agrees to submit to the exclusive jurisdiction of the New Zealand courts in respect of any dispute concerning the ROI or the ROI process.

2. Disclaimer

i. The Buyer will not be liable in contract, tort, equity, or in any other way whatsoever for any direct or indirect damage, loss or cost incurred by any Respondent or any other person in respect of the ROI process.

ii. Nothing contained or implied in the ROI, or ROI process, or any other communication by the Buyer to any Respondent shall be construed as legal, financial or other advice. The Buyer has endeavoured to ensure the integrity of such information. However, it has not been independently verified and may not be updated.

iii. To the extent that liability cannot be excluded, the maximum aggregate liability of the Buyer is $1.

3. Precedence

i. Any conflict or inconsistency in the documents forming the ROI shall be resolved by giving precedence in the following descending order:

   i. Section 1, paragraph 1.6

   ii. Section 4 (ROI-Terms)

   iii. all other Sections of this ROI document

   iv. any additional information or document provided by the Buyer to Respondents through the Buyer's Point of Contact or GETS.

ii. If there is any conflict or inconsistency between information or documents having the same level of precedence the later information or document will prevail.

Definitions

In relation to this ROI the following words and expressions have the meanings described below.

Advance Notice	A notice published by the buyer on GETS in advance of publishing the ROI. An Advance Notice alerts the market to a contract opportunity. Where used, an Advance Notice forms part of the ROI.
Business Day	Any week day in New Zealand, excluding Saturdays, Sundays, New Zealand (national) public holidays and all days from Boxing Day up to and including the day after New Year's Day.
Buyer	The Buyer is the government agency that has issued the call for Registrations of interest through a ROI with the intent of purchasing the goods or services described in the Requirements. The term Buyer includes its officers, employees, contractors, consultants, agents and representatives.
Competitors	Any other business that is in competition with a Respondent either in relation to the goods or services sought under the ROI or in general.
Confidential Information	Information that: 1. is by its nature confidential 2. is marked by either the Buyer or a Respondent as 'confidential', 'commercially sensitive', 'sensitive', 'in confidence', 'top secret', 'secret', classified' and/or 'restricted' 3. is provided by the Buyer, a Respondent, or a third party in confidence 4. the Buyer or a Respondent knows, or ought to know, is confidential. Confidential information does not cover information that is in the public domain through no fault of either the Buyer or a Respondent.

Conflict of Interest	A Conflict of Interest arises if a Respondent's personal or business interests or obligations do, could, or be perceived to, conflict with its obligations to the Buyer under the ROI or in the provision of the goods or services. It means that the Respondent's independence, objectivity or impartiality can be called into question. A Conflict of Interest may be: ▪ actual: where the conflict currently exists ▪ potential: where the conflict is about to happen or could happen, or ▪ perceived: where other people may reasonably think that a person is compromised.
Contract	The written contract/s entered into by the Buyer and Successful Respondent/s for the delivery of the Requirements.
Deadline for Registration	The deadline that Registrations are to be delivered or submitted to the Buyer as stated in Section 1, paragraph 1.2.
Deadline for Questions	The deadline for suppliers to submit questions to the Buyer as stated in Section 1, paragraph 1.2, if applicable.
Evaluation Approach	The approach used by the Buyer to evaluate Registrations as described in Section 3, the ROI-Terms (as varied by Section 1, paragraph 1, if applicable.).
GETS	Government Electronic Tenders Service www.gets.govt.nz
GST	The goods and services tax payable in accordance with the New Zealand Goods and Services Tax Act 1985.
Intellectual Property	All intellectual property rights and interests, including copyright, trademarks, designs, patents and other proprietary rights, recognised or protected by law.
Point of Contact	The Buyer and each Respondent are required to appoint a Point of Contact. This is the channel to be used for all communications during the ROI process. The Buyer's Point of Contact is identified in Section 1, paragraph 1.3. The Respondent's Point of Contact is identified in its Registration.
Registration	The response a Respondent submits in reply to the Buyer's ROI. It comprises the Response Form, the Respondent's registration and all other information submitted by a Respondent.
ROI	Means the Buyer's call for Registrations of Interest.
Registration of Interest	The Buyer's call for Registrations of Interest comprises the Advance Notice (where used), this ROI document (including the ROI-Terms) and any other schedule, appendix or document attached to ROI, and any subsequent information provided by the Buyer to Respondents through the Buyer's Point of Contact or GETS.
ROI-Terms	Means the Process, Terms and Conditions that apply to this Registration of Interest Conditions as described in Section 4.
ROI Process, Terms and Conditions (shortened to ROI-Terms)	The government's standard terms and conditions that apply to ROIs as described in Section 4. These may be varied at the time of the release of the ROI by the Buyer in Section 1, paragraph 1.6. These may be varied subsequent to the release of the ROI by the Buyer on giving notice to Respondents.
Requirements	The goods and/or services described in Section 2 which the Buyer intends to purchase.
Respondent	A person, organisation, business or other entity that submits a Registration in response to the ROI. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Registration.'

Response Form	The form and declaration prescribed by the Buyer and used by a Respondent to respond to the ROI, duly completed and submitted by a Respondents as part of its Registration.

Tertiary Education Commission
Te Amorangi Mātauranga Matua

Level 9, 44 The Terrace
PO Box 27048
Wellington, New Zealand 6141
P +64 4 462 5200
www.tec.govt.nz

Request for Proposals

Market Segmentation Research

GETS reference number 20906456

RFP released: 03 04 19

Deadline for Questions: 4.00pm 12 04 19

Deadline for Proposals: 2.00pm 02 05 19

Contents

This opportunity in a nutshell

What we need

As the government agency responsible for careers, the Tertiary Education Commission (TEC) is focussed on supporting all New Zealanders to raise their skills and aspirations to meet the demands of work, now and in the future.

As such, TEC is seeking to conduct market research to gain valuable customer insights, so that the information and tools we develop are relevant, effective and delivered via the most influential partners.

What we don't want

We do not want pre-existing research reports, a focus on quantitative data, or user testing.

We require ethnographic research to identify insights, that can then be validated at scale to ensure those insights are representative of the customer segment group.

What's important to us

We are looking for either one or several providers who have the capability, experience and infrastructure to conduct customer insight research across a wide range of customer segments. Given the research is so broad (12 customer segments ranging from primary school children to people in work), we are looking for the best methodology and sampling approach to achieve our goals, based on previous experience and existing networks for recruiting in these segments.

Why should you bid?

This is a unique opportunity to lead customer insights research that will inform our mission; to raise the education level, and the skills and aspirations of all New Zealanders, to meet the demands of work, now and in the future.

While NZ currently has a very strong labour market, we have the highest rate of skills mismatch in the OECD (more than 30% of people are over qualified for the jobs they are in and more than 10% are under-qualified). This leads to high churn, with around 1.2 million people starting new jobs each year, and 1 in 8 workers leaving their job within 2 months. For an employer this can mean low productivity, depletion of resources for recruitment and training and low staff morale.

To try and shift this cycle, TEC has developed a Careers System Strategy, which will ensure

1. New Zealanders are aware of the education options available to achieve a wide range of skills, as well as the demand and transferability of those skills across a range of jobs.

2. New Zealanders are encouraged to participate in lifelong learning.

3. New Zealanders have access to relevant products and services that support equity and social mobility.

As we promote the idea of skills (rather than jobs) that can be transferrable, or added-to over time, workers will have access to a greater range of job opportunities throughout their lives. We believe this will help employers with access to skilled labour, and workers for a fulfilling and productive life.

The customer insights that this procurement will deliver, will be the vital first step to ensuring that we can develop the right products and services for each customer segment and that we can partner with relevant third parties to deliver tailored interventions where they are required.

A bit about us

The Tertiary Education Commission/Te Amorangi Mātauranga Matua (TEC) is the Government's careers and tertiary education investment agency. We invest approximately $2.9 billion in all forms of post-secondary school education across more than 700 of New Zealand's tertiary education organisations. At 1 July 2017 our role extended to shaping the future of careers information and guidance for all New Zealanders to encourage lifelong learning.

SECTION 1: Key information

1.1 Context

a. This Request for Proposals (RFP) is an invitation to suitably qualified suppliers to submit a Proposal for the Market Segmentation Research contract opportunity.

b. This RFP is a single-step procurement process.

c. Words and phrases that have a special meaning are shown by the use of capitals e.g. Respondent, which means '*a person, organisation, business or other entity that submits a Proposal in response to the RFP. The term Respondent includes its officers, employees, contractors, consultants, agents and representatives. The term Respondent differs from a supplier, which is any other business in the market place that does not submit a Proposal*.' Definitions are at the end of Section 6.

1.2 Our timeline

a. Here is our timeline for this RFP.

Steps in RFP process:	**Date:**
RFP released on GETS	03 04 19
Deadline to register for supplier briefing session:	10 04 19
Date of the supplier briefing session:	12 04 19
Deadline for Questions from suppliers:	16 04 19
Deadline for the Buyer to answer suppliers' questions:	24 04 19
Deadline for Proposals:	2.00pm 01 05 19
Shortlisted Respondents' presentations:	week starting 13 05 19
Unsuccessful Respondents notified of award of Contract:	22 05 19
Respondents' debriefs:	week starting 27 05 19
Anticipated Contract start date:	03 06 19

b. All dates and times are dates and times in New Zealand.

1.3 How to contact us

a. All enquiries must be directed through GETS to our Point of Contact. We will manage all external communications through this Point of Contact through GETS.

b. Note any questions raised in GETS will be automatically directed to our Point of Contact.

c. If you would like to attend our supplier briefing session please email our Point of Contact to register before 5pm on 10th April 2019.

d. **Our Point of Contact**

Name: Karn Bloomfield

Title/role: Executive Assistant, Strategic Engagement

Email address: karn.bloomfield@tec.govt.nz

1.4 Developing and submitting your Proposal

a. This is a closed, competitive tender process. The RFP sets out the step-by-step process and conditions that apply.

b. Take time to read and understand the RFP. In particular:

   i. develop a strong understanding of our Requirements detailed in Section 2.

   ii. in structuring your Proposal consider how it will be evaluated. Section 3 describes our Evaluation Approach.

c. For helpful hints on tendering and access to a supplier resource centre go to: www.procurement.govt.nz / for suppliers.

d. If anything is unclear or you have a question, ask us to explain. Please do so before the Deadline for Questions. Raise a question via GETS or email our Point of Contact.

e. In submitting your Proposal you must use the Response Form provided. This is a Microsoft Word document that you can download.

f. You must also complete and sign the declaration at the end of the Response Form.

g. You must use the pricing schedule template for your pricing information.

h. Check you have provided all information requested, and in the format and order asked for.

i. Having done the work don't be late – please ensure you get your Proposal to us before the Deadline for Proposals!

1.5 Address for submitting your Proposal

a. Proposals must be submitted electronically to GETS (www.gets.govt.nz)

b. Proposals sent by post or fax, or hard copy delivered to our office, will not be accepted.

1.6 Our RFP Process, Terms and Conditions

a. **Offer Validity Period**: In submitting a Proposal the Respondent agrees that their offer will remain open for acceptance by the Buyer for three calendar months from the Deadline for Proposals.

b. The RFP is subject to the RFP Process, Terms and Conditions (shortened to RFP-Terms) described in Section 6. We have not made any variation to the RFP-Terms.

1.7 Later changes to the RFP or RFP process

a. If, after publishing the RFP, we need to change anything about the RFP, or RFP process, or want to provide suppliers with additional information we will let all suppliers know by placing a notice on the Government Electronic Tenders Service (GETS) at www.gets.govt.nz

b. If you downloaded the RFP from GETS you will automatically be sent notifications of any changes through GETS by email.

SECTION 2: Scope of Work

2.1 Background

An effective Careers System will ensure that people entering the workforce will have the right skills to meet demand, and that people in the workforce have ongoing access to information and tools to help them identify and grow their skills as required. This is important as three global mega trends influence the future of work:

1. Aging populations means that people have longer working lives
2. Digitisation means that jobs are constantly changing as technology improves
3. Globalisation means that New Zealanders will need to lift their skills and capabilities to remain competitive in the global economy.

The Tertiary Education Commission has three key deliverables to ensure New Zealanders are well informed about their options for skills and training so that they can have successful working lives. This procurement for market segmentation research will explore insights from 12 customer segments, including 6 priority segments we have identified as having the most need for improved outcomes.

The key deliverables are as follows:

1. **Careers.govt.nz website.** This is the main customer interface for education and careers information, with over 4 million sessions per annum. It will be refreshed over the next 12 months to reach new (currently not targeted) audiences and align with government priorities.
2. **Inspiring the future.** This is a platform to connect primary schools with volunteers from the world of work, to raise aspirations within primary school children by exposure to a wider range of professions.
3. **Managed and Accessible Pathways (MAPS).** This will include a new website to replace careers.govt, as well as personalised profiles and tools to help users navigate lifelong learning.

2.2 Customer Segments

In order to understand where TEC should focus their resources for the biggest impact, we analysed a New Zealand population of 3.95m people within the careers system to identify key customer segments. A combination of the following factors were used: age, stage of life (learner, workforce, not in labour force), demographic data (school decile) and education level (level 1-7).

The results included the following 12 segments. By ensuring that our information and services are reaching these segments, we hope to start lifting the skills and aspirations for all, so that the cycle of high skills mismatch, poor productivity and social inequality does not continue.

Note: the numbers shown have been estimated using a variety of data sources. Qualification level 1-3 is foundation learning, level 4-6 is mainly vocational learning and level 7+ is degree and postgraduate learning.

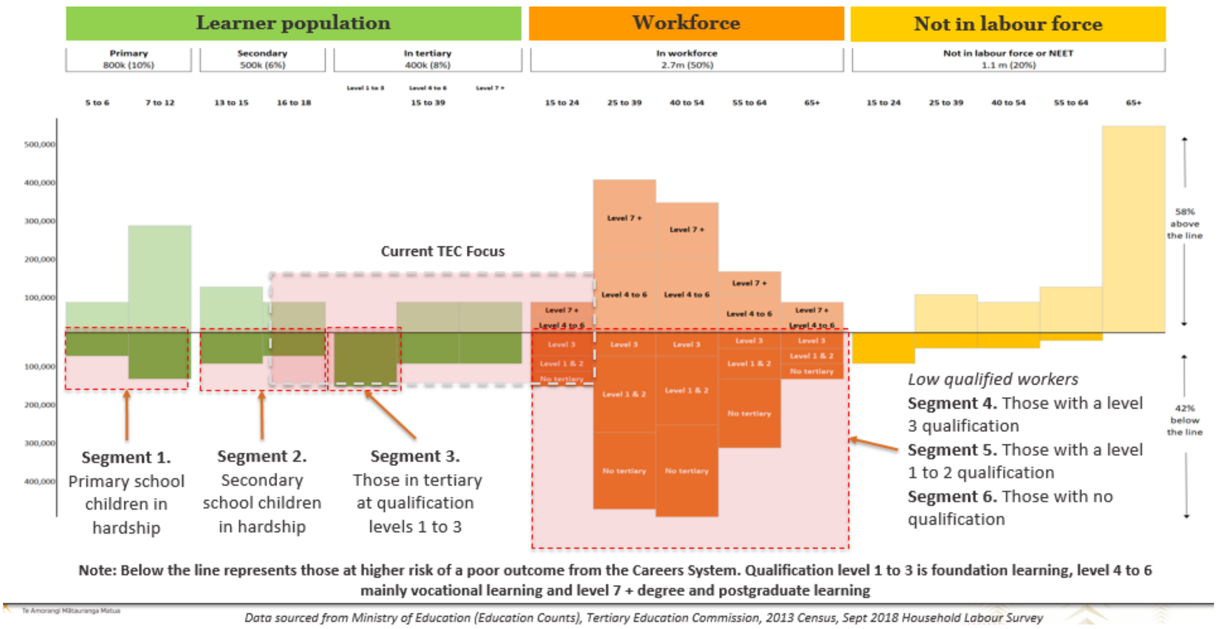
Segment number	Segment Description	Qty People (Total 3.9m)
Focus Segment 1	Primary school children in hardship (ages 7 to 12)	143,000
Focus Segment 2	Secondary school children in hardship (ages 13-18)	82,000
Focus Segment 3	Tertiary L1-L3 (foundation learning) (ages 15 to 39)	111,000

Focus Segment 4	In work, L3 qualification	145,000
Focus Segment 5	In work, L1-L2 qualification	556,000
Focus Segment 6	In work, no qualification	706,000
Segment 7	Primary school children (ages 7 to 12)	387,000
Segment 8	Secondary school children (ages 13 to 18)	292,000
Segment 9	Tertiary L4+ (vocational and degree level learning) (ages 15 to 39)	282,000
Segment 10	In work, L4+	1,110,000
Segment 11	Unemployed, in transition	70,000
Segment 12	Not in education or training, long term unemployed	70,000

We are seeking meaningful insights for all 12 customer segments, but six of the 12 segments will have a priority focus for tailored interventions. We expect that your response will detail how you will ensure appropriate participant samples and deliver meaningful insights.

2.3 Where TEC can provide the most impact

The largest segment of the population is people in work with a level 4 or higher qualification (1.1m). This is where everyone in the workforce should aspire: to have sufficient income, wellbeing, resilience, employment security and life outcomes.



However, when this segment is taken as a percentage of the total workforce (2.7m), the picture is not so good. Almost half of the workforce in New Zealand (1.4m) have either no qualifications at all, or low qualifications (Level 3 or less). Unfortunately Māori and Pasifika populations are over represented in these segments, so this group needs to have considerable focus across all of our insights research.

To support the view that qualifications over level 3 lead to more positive outcomes, we looked at the average income for all age groups between 18-64, over a three year period (2015 to 2017). The average wage for a person with level 3, below or no qualification was $29,471. In contrast, the average wage for someone with a level 4 and above qualification was $53,467 – a significant 80% increase.

This combined with the large proportion of children living in hardship (225,000) means the cycle of children transitioning to work with low levels of educational achievement (and skills) is likely to continue.

2.4 What we need

This RFP relates to the purchase of customer insights research to help us inform the products, services and delivery partners we use for the Careers System Strategy deliverables. We are looking for an overall approach that has sound methodology to elicit the responses we need from each segment.

There are five key insights that we want to identify for each (12) segment:

- Key influencers in education and career choices
- Key trigger points that lead to education and career assessment or information needs
- Key barriers/constraints to education and training
- Key values and important cultural themes
- Key channels of communication and potential delivery partners

In addition, we want to conduct insights research for the following stakeholder groups, to assist with specific deliverables:

1. Inspiring the futures programme
   - Primary School Principals and Teachers (who will be running the programme)
   - Parents and whānau (who will be supporting kids attending the programme)
   - Employers (who will be supporting by volunteering for the programme)

2. Careers perception research (website URL/name)
   - Our current website is www.careers.govt.nz. We need to investigate if "careers" is the best term going forward, when we are signalling a shift in focus to skills (that are transferrable to a number of different jobs) rather than a single linear career path.
   - We need to identify what the term "careers" means to people across our customer segment groups, and out of those insights, understand which terms could potentially replace the use of careers.

We are seeking the insights in a format which allows us to develop our products and services to better meet the needs of our users. We expect the supplier to indicate a preferred method of delivering the insights to us, but anticipate that there will be a report summarising the insights delivered. As we will be progressing our development during this contract, it is important for the supplier to provide ongoing information in the form of data tables or similar, not only the final report.

2.5 What we require: the solution

We are seeking proposals from each of the invited vendors that outline a recommended approach, or approach options to gain these key insights.

The proposal should include:

- A process to plan the project (what inputs and resource required from TEC).
- A process and recommended channels for recruiting research subjects for each segment.

- Recommended approach and methodology for the research itself. This should include an example for each of the six focus customer segments, of the methodology you would use to elicit the 5 required insights, the sample size recommended to identify a common theme and how this would be validated at a larger scale to account for geographic, social and demographic differences. It should also identify any potential limitations to the insights with the methodology, and how you will seek to address them.
- A process for collating information and reporting back as meaningful insights.
- A high level project plan to indicate timeframes, key milestones and check-in points with TEC
- The level of resource and support required from TEC to support this project.

We have an allocated budget of up to $355,000. All proposals must fall under the maximum of $355,000 or they will not be accepted.

2.6 What we require: capacity

We are seeking suppliers that are able to demonstrate that they have the capacity to deliver meaningful and actionable insights for our identified customer segments within the timeframes. We may select one or several providers, with the potential for multiple research streams running in parallel within a six month period.

Please indicate the size of your team, your leadership structure, how you would scale-up if required and the time that it would take to reach the required capacity.

Please include any examples of previous research projects that were delivered successfully, with a similar scale, budget and timeframe to help to demonstrate this capability.

2.7 What we require: capability

We are seeking suppliers that are able to demonstrate the capability to identify deep customer insights that can be validated across a large population group.

In addition, please detail how you will transfer this knowledge to TEC in a formal and timely manner, so that those insights can be used to develop products and services, as well as marketing and communications messages.

Please detail the names, qualifications and key experience of the people who would lead this project, as well as any previous work examples that are relevant to this project.

2.8 Contract term

We anticipate that the Contract will commence June 2019. The anticipated Contract term and options to extend are:

Description	Years
Initial term of the Contract	(June-December 2019)
Maximum term of the Contract	Until June 2020

2.9 Key outcomes

The following are the proposed key outcomes that are to be delivered.

Description	Indicative date for delivery
Customer segment insights (12 segments, with six focus segments prioritised)	Ongoing findings to TEC from August 2019
Inspiring the future stakeholder research completed	August 2019
Careers perception research completed	September 2019
Summary report – final report to summarise all of the key insights across all the individual segments and research work streams. This report should identify any overarching themes or linkages that may not have been apparent during each stage.	Draft Report 31 October 2019 Finalised by 20 December 2019.

2.10 Other information

a. We expect the research methodology to be robust and stand-up to questions on validity.

b. Payment will be on successful delivery of milestones

c. New Intellectual Property arising as a result of the Contract will be the property of TEC.

2.11 Other tender documents

In addition to this RFP we will provide a vendor briefing at TEC, on Friday 12th April (refer to our timeline, section 1.2) to provide context, background and opportunity for questions relating to the research requirements.

SECTION 3: Our Evaluation Approach

3.1 Evaluation model

The evaluation model that will be used is weighted attribute (weighted criteria).

This means that Proposals that are capable of full delivery on time and within budget will be shortlisted by score and an overall assessment will be made based on the solution, experience, capability, capacity and price.

3.2 Pre-conditions

Each Proposal must meet all of the following pre-conditions. Proposals which fail to meet one or more will be eliminated from further consideration.

Respondents who are unable to meet all pre-conditions should conclude that they will not benefit from submitting a Proposal.

#	Pre-condition
1.	Must have capacity to complete market research within 6 months.
2.	Must be operational to begin insights research within 1 month of the contract award.
3.	Must provide detailed pricing to deliver the insights within a maximum budget of $355,000.

3.3 Evaluation criteria

Proposals which meet all pre-conditions will be evaluated on their merits according to the following evaluation criteria and weightings.

Criterion	Weighting
1. Proposed solution (fit for purpose)	**40%**
Recommended approach and methodology to gather insights from the 6 focus customer segments as well as the two additional deliverables (Section 2.4)	
Methodology for recruitment, indicating existing networks or channels for each of the 6 focus segments.	
Project plan with key milestones and check-ins	
Outline for reporting and insights knowledge transfer	
2. Capability of the Respondent to deliver	**25%**
Key staff on the project, their experience and capability and how they would be spread across the project or allocated to specific research work streams.	
Relevant case studies for similar projects in size, scope and time frame	
3. Capacity of the Respondent to deliver	**20%**
Staff resource plan to scale up/down as required	
4. Value for money	**15%**
Detailed pricing to ensure the project is delivered within the budgeted amount.	
Total weightings	**100%**

3.4 Scoring

The following scoring scale will be used in evaluating Proposals. Scores by individual panel members may be modified through a moderation process across the whole evaluation panel.

Rating	Definition	Score
EXCELLENT significantly exceeds the criterion	Exceeds the criterion. Exceptional demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. Proposal identifies factors that will offer potential added value, with supporting evidence.	**9-10**
GOOD exceeds the criterion in some aspects	Satisfies the criterion with minor additional benefits. Above average demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion. Proposal identifies factors that will offer potential added value, with supporting evidence.	**7-8**
ACCEPTABLE meets the criterion in full, but at a minimal level	Satisfies the criterion. Demonstration by the Respondent of the relevant ability, understanding, experience, skills, resource, and quality measures required to meet the criterion, with supporting evidence.	**5-6**
MINOR RESERVATIONS marginally deficient	Satisfies the criterion with minor reservations. Some minor reservations of the Respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**3-4**
SERIOUS RESERVATIONS significant issues that need to be addressed	Satisfies the criterion with major reservations. Considerable reservations of the respondent's relevant ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**1-2**
UNACCEPTABLE significant issues not capable of being resolved	Does not meet the criterion. Does not comply and/or insufficient information provided to demonstrate that the Respondent has the ability, understanding, experience, skills, resource and quality measures required to meet the criterion, with little or no supporting evidence.	**0**

3.5 Price

We wish to obtain the best value-for-money over the whole-of-life of the Contract. This means achieving the right combination of fit for purpose, quality, on time delivery, quantity and price.

If a Respondent offers a price that is substantially lower than other Proposals (an abnormally low bid), the Buyer may seek to verify with the Respondent that the Respondent is capable of fully delivering all of the Requirements and meeting all of the conditions of the Proposed Contract for the price quoted.

3.6 Evaluation process and due diligence

In addition to the above, we will undertake the following process and due diligence in relation to shortlisted Respondents. The findings will be taken into account in the evaluation process.

a. reference check the Respondent organisation and named personnel

b. interview Respondents

c. request Respondents make a presentation

SECTION 4: Pricing information

3.1 Pricing information to be provided by respondents

Respondents are to provide their price as part of their Proposal. In submitting the Price the Respondent must meet the following:

a. Respondents are to use the pricing schedule template provided.

b. the pricing schedule is to show a breakdown of all costs, fees, expenses and charges associated with the full delivery of the Requirements over the whole-of-life of the Contract. For example, travel, accommodation, koha and incentives. It must also clearly state the total Contract price exclusive of GST.

c. where the price, or part of the price, is based on fee rates, all rates are to be specified, either hourly or daily or both as required.

d. in preparing their Proposal, Respondents are to consider all risks, contingencies and other circumstances relating to the delivery of the Requirements and include adequate provision in the Proposal and pricing information to manage such risks and contingencies.

e. respondents are to document in their Proposal all assumptions and qualifications made about the delivery of the Requirements, including in the financial pricing information. Any assumption that the Buyer or a third party will incur any cost related to the delivery of the Requirements is to be stated, and the cost estimated if possible.

f. prices should be tendered in NZ$. Unless otherwise agreed, the Buyer will arrange contractual payments in NZ$. If there are foreign exchange implications explain how risk in foreign exchange will be dealt with here.

g. where a Respondent has an alternative method of pricing (i.e. a pricing approach that is different to the pricing schedule) this can be submitted as an alternative pricing model. However, the Respondent must also submit a pricing schedule that conforms.

h. where two or more Respondents intend to lodge a joint or consortium Proposal the pricing schedule is to include all costs, fees, expenses and charges chargeable by all Respondents.

SECTION 5: Our Proposed Contract

5.1 Proposed Contract

The following is the Proposed Contract that we intend to use for the purchase and delivery of the Requirements.

In submitting your Proposal you must let us know if you wish to question and/or negotiate any of the terms or conditions in the Proposed Contract, or wish to negotiate new terms and/or conditions. The Response Form contains a section for you to state your position. If you do not state your position you will be deemed to have accepted the terms and conditions in the Proposed Contract in full.

SECTION 6: RFP Process, Terms and Conditions

Please refer to Attachment 1 for the RFP Process, Terms and Conditions, which is downloadable from GETS as a PDF format file.

The RFP Process, Terms and Conditions are also available on the Procurement.govt website:
https://www.procurement.govt.nz/assets/procurement-property/documents/rfp-process-terms-and-conditions.pdf