Service Specification

Prince2 Agile Training Services

P38 - Prince2 Agile Training Services

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# Introduction

Salix Finance Ltd (Salix) is seeking to award a contract for the provision of Prince2 Agile Training for a period of 12 months.

Our business is the administration and oversight of finance to Public Sector Organisations, Housing Associations, Charities (where they are registered social housing providers) and, in limited specified circumstances, private homeowners and such other similar organisations to support the development and implementation of greenhouse gas reduction or equivalent projects and energy efficiency projects. This entails the issue of funds and monitoring compliance with conditions but also providing audit and assurance for projects overseen by others.

Salix was incorporated in England and Wales in 2004 and is a company limited by guarantee. The Department for Energy Security and Net Zero (DESNZ) is our sole member and guarantor and a DESNZ representative is a non-Executive Director on our Board. We are classified by the Cabinet Office as a Non-Departmental Public Body.

Our registered office is in London, with a second office in Manchester. We have been delivering public sector funding schemes on behalf of the UK government since 2004. The first schemes we delivered were interest-free loans, which gave financial support to boost energy efficiency across the public sector. Since then, we have grown to offer a wide range of schemes which are supported by our expertise and experience.

Our mission is to enable and inspire organisations to achieve net zero and create better places to live and work. We have a national portfolio of funding schemes currently live across England, Scotland and Wales.

# Background

The purpose of this training is to enhance Salix’s project delivery capabilities by combining structured project management (PRINCE2) with agile methodologies, ensuring Salix staff are equipped with modern, flexible approaches to managing projects.

# Scope of the Contract, Historical Data and Volume Forecast

This requirement is established on a zero-commitment basis. Individual training programmes will be commissioned on an as-needed basis, tailored to specific learning requirements. Each programme will be scoped, specified and priced at the point of request. All pricing submitted must be exclusive of VAT.

# Detailed Requirements

The primary objectives of this requirement are to:

* Provide Salix staff with PRINCE2 Agile Foundation and/or Practitioner level training
* Ensure participants are prepared and eligible to sit and pass the associated accredited certification exams
* Support the development of internal project delivery capabilities aligned with best practice in agile project management
* Deliver training in a cost-effective, accessible, and timely manner

## 4.1 Functional Requirements

The successful supplier will be required to:

* Deliver PRINCE2 Agile Foundation and/or Practitioner training to a cohort of staff members
* Provide accredited course materials and certified trainers
* Include the official exams for both Foundation and/or Practitioner levels
* Offer training via in-person, virtual classroom, or blended learning, depending on Salix’s preference and staff availability
* Support learners with pre-course materials, mock exams, and post-course support as needed
* Provide a report on learner attendance and outcomes, including pass/fail rates (subject to GDPR/data privacy)
* Deliver training within a mutual agreed timeframe
* Provide learner feedback reports on training quality and impact

## 4.2 Performance Requirements

The successful supplier will be expected to meet the following performance requirements throughout the delivery of PRINCE2 Agile training services:

**Training Quality and Content:**

* All training must be delivered in accordance with the official PRINCE2 Agile syllabus
* Materials must be up to date, professionally produced, and aligned to the latest exam specifications
* Trainers must be accredited and demonstrate strong delivery and facilitation skills

**Participant Satisfaction:**

* A minimum average satisfaction rating of 80% must be achieved across all course participants, based on post-course feedback forms (covering trainer effectiveness, relevance of materials, and overall course experience)
* Feedback forms must be shared in anonymised summary form with Salix within ten working days of course completion

**Timeliness:**

* Training must be delivered within agreed timeframes and schedules, as set out in the contract or agreed delivery plan
* Any changes or delays must be communicated to Salix no less than five working days in advance and approved in writing

**Trainer Continuity and Availability:**

* Trainers assigned to courses must remain consistent throughout each course cohort, unless otherwise agreed
* Replacement trainers must meet the same qualification and experience standards and be approved by Salix

**Responsiveness and Communication:**

* The provider’s Contract Manager must respond to emails or queries from Salix within two working days
* Any issues affecting delivery, learner experience, or certification must be reported within 24 hours of identification

**Compliance and Confidentiality:**

* The provider must handle learner data in accordance with UK GDPR and Salix’s data handling policies
* All training content must be licensed, copyright-compliant, and not shared externally without consent

**Reporting and Documentation:**

* The provider must submit the following within ten working days of training completion:
  + Attendance register
  + Exam results summary (subject to consent)
  + Participant feedback report
  + Lessons learned or improvement suggestions (if applicable)

## 4.3 Mandatory Requirements

* Trainers must be accredited PRINCE2 Agile instructors
* Proven experience delivering training to public sector clients
* Ability to adapt training to align with Salix’s context and project environment
* To provide training between Monday – Friday between the hours of 9am - 5pm
* Securely collect, stored and use data in line with GDPR
* Agree to the contractual terms and conditions of Salix Finance Ltd

# 5. Contract Duration and Anticipated Commencement Date

It is anticipated that the contract for Prince2 Agile Training Services will commence in September 2025 for period of 12 months, with an optional extension of 12 months.

6. Estimated Contract Value

Salix is unable to confirm an estimated contract value at this stage as this will depend on delegate uptake and pricing proposals.

# 7. Key Performance Indicators (KPIs)

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Service Description** | **Measurement of Service Level** | **Target**  **(%)** |
| A | Course enrolment & onboarding | Delegates enrolled and joining instructions issued | 100% within 3 working days of Salix confirming course booking |
| B | Course materials | Access to up-to-date, official PRINCE2 Agile materials provided to delegates | 100% at least 3 working days before course start |
| C | Trainer accreditation | Trainers hold current PRINCE2 Agile instructor certification and have experience with public sector delivery | 100% compliance |
| D | Training delivery | Training delivered as per schedule by named trainer | 100% delivered as booked |
| E | Named account management | UK-based named account manager provided with contact details | 100% within 2 working days of contract award |
| F | Issue resolution | Delegate or client issues responded to and resolved | 95% resolved within 24 hours |
| G | Course evaluation | Delegate satisfaction survey collected and analysed post-course | ≥ 85% average satisfaction score |
| H | Exam results reporting | Summary of pass/fail results provided to Salix | 100% within 2 working days of results release |
| I | Exam failure notification | Notification of any exam failures, including available next steps or support options | 100% within 2 working days of results release |
| J | Certification | Delegate certificates issued | 95% within 10 working days of course completion |
| K | Post-course support | Trainer or support contact available for delegate queries after training | Minimum of 2 weeks post-course |
| L | Monthly reporting | Course summary including delegate data, issues, and outcomes provided to Salix | 100% by agreed monthly deadline |
| M | Trainer substitution | Any changes to named trainer communicated to Salix | 100% within 24 hours of change |
| N | Service failure reporting | All failures (e.g. missed deadlines, trainer absence, etc.) logged and reported to Salix with resolution plan | 100% within 2 working days of incident |
| O | Technical support (if virtual) | Delegate technical issues with platform, exams or materials resolved | 95% resolved within 1 working day |

# 8. Contract Management and Review

The successful supplier will be required to:

* Nominate a **dedicated, experienced Contract Manager** who will act as the primary point of contact for all contractual, logistical and performance-related matters throughout the engagement with Salix.
* The Contract Manager will be responsible for overseeing the end-to-end delivery of the training services and must:
  + Attend regular performance review meetings with Salix
  + Provide progress updates and/or reports in line with agreed timelines and formats

# 9. Social Value

Salix is driving sustainability to achieve the Government’s carbon net zero ambition, adopting modern technology and reshaping our services to deliver a revised workplace strategy that is genuinely people focused.

We expect our suppliers and training providers to support these goals by:

* Using environmentally responsible practices where possible (e.g. minimising waste, using digital materials instead of printed copies)
* Supporting diversity, inclusion and wellbeing within their organisation and during training delivery
* Contributing positively to local communities where feasible
* Being transparent about their sustainability efforts

We recognise that training delivery may be primarily be in-person at Salix offices and we encourage practical actions that contribute to sustainability in this context.

# 10. General Data Protection Regulation (GDPR)

All providers must comply with the **UK General Data Protection Regulation (UK GDPR)** and the **Data Protection Act 2018** when processing personal data on behalf of Salix Finance.

**Types of Data Processed:**

As part of delivering training services under this requirement, providers may be required to process the following categories of personal data:

* Participant information: names, job titles, departments, contact details
* Attendance records: sign-in sheets, registration logs
* Feedback and evaluation data: post-training surveys, qualitative comments, ratings
* Learning analytics: engagement metrics, completion rates, assessment results (if applicable)
* Accessibility and support needs: where disclosed voluntarily by participants to support inclusive delivery

No special category data (e.g. health, ethnicity or disability status) should be collected unless explicitly required, justified and agreed in advance with Salix and subject to appropriate safeguards.

**Data Processing Requirements:**

Providers will act as **Data Processors** and must:

* Process personal data only on documented instructions from Salix, the Data Controller
* Ensure data is processed lawfully, fairly and transparently and only for the purposes of delivering the commissioned training
* Implement appropriate technical and organisational measures to ensure data security, including:
* Encryption and secure storage
* Access controls and user authentication
* Regular data backups and secure disposal procedures
* Support Salix in fulfilling its obligations under UK GDPR, including:
* Responding to data subject rights requests (e.g. access, rectification, erasure)
* Maintaining records of processing activities
* Cooperating with audits or inspections
* Notifying Salix without undue delay in the event of a personal data breach

**Data Retention and Transfer:**

Personal data must only be retained for the duration necessary to fulfil the training engagement and must be securely deleted or returned to Salix upon completion, unless otherwise agreed.

* No personal data may be transferred outside the UK without prior written consent from Salix and appropriate safeguards in place

A **Data Processing Agreement (DPA)** will be required where personal data is processed. Providers must ensure that all personnel involved in data handling are trained in data protection and subject to confidentiality obligations.

# 11. Information and Data Security

Suppliers must refer to Section 12: Information Assurance for full requirements relating to the handling, security, and transfer of Salix data.

# 12. Information Assurance

Suppliers must ensure sensitive information is only accessible to authorised individuals, maintain accuracy and completeness of information to prevent unauthorised modification.

Providers must ensure the **confidentiality, integrity and availability** of all information shared by Salix throughout the duration of the contract. This includes both digital and physical information assets related to training delivery, participant data and organisational materials.

**Core Requirements:**

Providers must implement and maintain:

* Robust information governance policies and procedures aligned with public sector standards and proportionate to the sensitivity of the data handled
* Staff training and awareness programmes to ensure all personnel understand their responsibilities in protecting Salix information
* Access controls and role-based permissions to ensure only authorised personnel can access Salix data or systems
* Secure storage and transmission protocols including encryption, secure file sharing platforms and password protection for sensitive documents
* Incident response procedures to detect, report and respond to any actual or suspected information security breaches

**Compliance and Assurance**

* Providers must cooperate fully with any audits, spot checks, or assurance reviews conducted by Salix or its representatives
* Providers may be required to demonstrate compliance with recognised standards such as ISO/IEC 27001 (Information Security Management) or Cyber Essentials
* Where applicable, providers must adhere to any additional information assurance requirements outlined in a Security Aspects Letter issued by Salix

Failure to comply with information assurance obligations may result in termination of the contract.

# 13. Access to Premises

Salix has two offices: the registered office in Canary Wharf, London and the secondary office in central Manchester. There may be the need on occasion for the successful supplier to attend the office to deliver training

**Expectations:**

* Access granted for training purposes only
* Compliance with security, health and safety policies
* Trainers must present valid photo ID
* Trainers may be issued escorted visitor passes
* Pre-approved equipment and material

Salix reserves the right to deny or revoke access if necessary

# 14 Service Mobilisation

The supplier will identify the training requirements for Salix in respect to Prince2 Agile Training ensuring the necessary resource such as trainers, venues, equipment and learning materials are in place. The supplier will manage the enrolment process ensuring all participants are equipped with the correct materials prior to the course starting.

Mobilisation may include, but is not limited to:

* **Confirming delivery schedules and trainer availability** in line with Salix’s operational needs
* **Finalising training content and materials** in collaboration with the Organisational Design and People Team at Salix
* **Conducting pre-delivery briefings** with Salix stakeholders to clarify objectives, logistics and roles
* **Establishing logistical and technical arrangements**, including venue access, platform setup and accessibility adjustments
* **Onboarding delivery personnel**, ensuring they are briefed on Salix’s values, policies and expectations
* **Identifying and mitigating risks** that may impact delivery timelines or quality
* **Coordinating with internal stakeholders**, including HR, IT and facilities teams where applicable

# 15. Security Clearance

All personnel involved in the delivery of services under this framework must hold, as a minimum, **Baseline Personnel Security Standard (BPSS)** clearance. This is a mandatory requirement for working with Salix Finance and accessing government premises.

**Requirements**

* **Pre-engagement clearance**: All delivery personnel must have valid BPSS clearance prior to commencing any work under this requirement
* **Evidence of clearance** must be made available to Salix upon request
* **Advance notification**: Providers must notify Salix in advance of any changes to delivery personnel and ensure replacement staff also meet clearance requirements
* **Compliance with site protocols**: Trainers must present valid **photo identification** upon arrival at Salix’s offices in **London (10 South Colonnade)** and **Manchester (3 Piccadilly Place)**
* Trainers may be issued **escorted visitor passes** and must comply with all site-specific **security, health and safety, and conduct protocols**
* Providers must ensure that all personnel are briefed on Salix’s expectations regarding confidentiality, data protection and professional conduct while on site

Failure to comply with clearance or access requirements may result in denied entry or removal from the premises.

# 16.Exit Strategy

*T*he supplier will in agreement with Salix produce a detailed exit plan prior to contract termination. This plan will include:

* Clear handover arrangements, including the secure transfer of all relevant data, course materials, delegate records and any intellectual property within an agreed timeframe
* Responsibilities for completing any in-progress training sessions or administrative tasks
* A defined notice period for termination, specifying how much advance notice must be given by either party
* Financial reconciliation procedures, including settlement of any outstanding payments or refunds
* Cooperation requirements to ensure a smooth transition to any successor provider or in-house team
* Confirmation that confidentiality and data protection obligations will continue to apply after termination
* Procedures for resolving any disputes related to the exit process