



Australasian Research Management Society

PART A: PROPOSAL DETAILS

Services Requested: Cohort Moderator Package (Work Package 3)

Contact Person: Ms Maria Zollo, ARMS Chief Operating Officer

Proposal Closing Date: 19 March 2018

Proposal Validity and Assessment: 4 week assessment period

Proposal Delivery Method: Email proposals to
ARMS_COO@researchmanagement.org.au

Enquiries to: ARMS_COO@researchmanagement.org.au

PART B: PROPOSAL CONDITIONS

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1. PRELIMINARY

1.1. Definitions

In this request for Proposal, unless it is stated to the contrary;

Addendum means a notice issued by ARMS that amends any of the Proposal Conditions;

Business Day means a day other than a Saturday, Sunday or Public holiday in South Australia;

Contact Person means the contact person described in the Proposal Details;

Process means the Request for Proposal process;

Applicant means a person submitting a Proposal in response to this Request for Proposal or as the context may require, a person who has been given this Request for Proposal;

Proposal means a proposal lodged in accordance with this Request for Proposal;

Proposal Closing Date means the proposal closing date and time (being AEST) set out in the Proposal Details;

Proposal Form means the Proposal Form set out in Annexure A;

ARMS means the Australasian Research Management Society ABN 57 334 849 485

The Society means the Australasian Research Management Society ABN 57 334 849 485

The ARMS Executive means the governing body of ARMS which is responsible for the control and direction of the Society including its committees and publications;

Request for Proposal means this Request for Proposal comprising

Part A: Proposal Detail

Part B: Proposal Conditions

Annexure A: Proposal Form

2. BACKGROUND

The Australasian Research Management Society (ARMS) is an international organisation dedicated to the professional development of research managers and administrators, the promotion of the profession of research management and the enhancement of the research enterprise. The Society values a stronger, vibrant research sector in the region, high standards of research governance including the protection of integrity and ethics of research, and the profession of research management as integral to the research endeavour.

ARMS is a member of the International Network of Research Management Societies (INORMS) and through this network, has established strong links with 17 international research management societies www.inorms.net

ARMS comprises approximately 2700 members from universities, medical research institutes, Commonwealth research agencies, State and federal government departments. It is structured into a number of Chapters, mainly based around Australian States but also includes New Zealand and Singapore. It has Special Interest Groups convened around communities of specific research management issues. ARMS also has a number of standing committees, one of particular relevance to this proposal being the Education and Professional Development Committee (EPDC). It is governed by a Board of Directors with each Chapter also having local leadership groups – see the About Us tab at <http://researchmanagement.org.au/#> for a full listing of Chapters, Committees and Special Interest Groups as well as details of governance and the ARMS strategic plan.

Separate to the ARMS governance structures but important in the governance of the ARMS accreditation programs is the [Accreditation Council](#) providing quality assurance oversight of the Foundation and Professional level accreditation programs described below.

In fulfilling its aim of enhancing the research management profession, ARMS runs a successful annual conference supplemented by a number of local Chapter events each year.

2.1. Foundation Level Accreditation Program

An important element in the ARMS Professional Development program has been the introduction of a Foundation level Accreditation Program comprising 15 modules of learning

These modules are designed for:

- (a) Persons new to research management, ie 1-3 years' experience;
- (b) Those with longer experience but wishing to refresh their knowledge; and
- (c) Those who may have specialised in one specific area of research management but wish to broaden their knowledge in other areas.

Further details of the modules are given under the Accreditation tab at <http://researchmanagement.org.au/#>

In order to achieve Foundation Level Accreditation, candidates are required to complete and pass three compulsory and two elective modules (5 modules in total) and are then invited to complete a case study based on scenarios that may confront a practicing research manager. Since the introduction of the Foundation level accreditation program in September, 2013 there have been approximately 2700 unit registrations across the modules, with approximately 239

persons having completed all requirements and being accredited as Accredited Research Managers (Foundation) or ARM(F).

The quality and standards of the Foundation Level Accreditation Program are overseen by an arms-length [Accreditation Council](#) chaired by Professor Lee Astheimer, retired Deputy Vice Chancellor (Research) at Deakin University and comprising senior representatives from government agencies, university research offices and ARMS.

2.2. Professional Level Accreditation Program

Following the successful introduction of the Foundation Level Accreditation Program, ARMS has introduced a Professional Level Accreditation Program aimed at enhancing the leadership, management and content skills of senior research managers. This Professional level program adopts a cohort approach and comprises of multiple elements as follows:

- Element 1 - A core module focussing on leadership, management and strategic thinking skills – (20 hours)
- Element 2 - Two, one day electives focussing on deep, relevant content knowledge. Currently there are five electives in the Professional Level Accreditation Program – Understanding international research funding programs; Evidence based analysis of research performance; Assessing the societal benefits of research; Development of institutional research talent and Research governance – (16 hours)
- Element 3 - Participation in on-going group learning activities (9 hours) – participation in a 90 minute teleconference/Skype activity each two months over a several month period. The purpose of these moderated discussions is to enable participants to discuss their workplace assignments in a group context and/or to discuss institutional strategies to emerging hot topic issues
- Element 4 - A workplace activity based on core and elective modules – This will be a substantial written piece of work which may focus on some aspect of workplace change, development and implementation of an institutional strategy etc - (24 hours) and
- Element 5 - Professional mentoring/coaching activity – (12 hours) – based on one hour per month over a 12 month period. This element will be flexible in operation and tailored to the candidate's needs. The candidate may suggest a mentor, or may request that one be provided for them. Mentoring will include workplace shadowing and other activities that expose the candidate to input from senior managers. The mentoring component may also be an assessed component of the program
- Total content will be approximately 80 hours over a several month period and it is expected that candidates will spend another 80 hours in self-guided learning through selected readings and preparation for the program activities. .

This call for tender is for Element 3 Only

At the conclusion of the Professional level program it is envisaged that candidates will receive a designation of Accredited Research Manager (Professional).

Successful Applicants will be expected to develop the content for their work package for delivery by late April, 2018. This timeline should include at least one month for the ARMS Accreditation Council to assess and approve the content. The term of this tender is twelve (12) months subject to satisfactory performance.

Payment will be made as modules are delivered, not in advance during the development phase – tenderers should consider this in developing their own financial models.

Applicants will be responsible for developing assessment criteria for their work package. It is anticipated that the main assessment for this element will be active participation in the group sessions and the successful tenderer will need to incorporate appropriate criteria into their application.

3. DESCRIPTION OF WORK PACKAGE FOR ELEMENT 3

A key element in the ARMS Professional Level Accreditation program will be participation in on-going group learning activities, comprising nine hours in total assuming a 90 minute teleconference/skype activity each two months over a several month period.

These sessions are considered an important component of the overall Professional Level Accreditation Program as they are the only opportunity for program participants to meet collectively (in a virtual sense) apart from the face to face meetings in Elements 1 and 2. It is important that each group of participants maintain a cohort distinctive during their several month program and consequently the Cohort Moderator will need superior facilitatory networking skills to develop and maintain this effect.

Therefore these bi-monthly moderated discussions may adopt a range of formats (skype/zoom/teleconference/bulletin boards etc) and may discuss a range of topics including leadership/management topics raised from Element 1, topics of national relevance to research managers and national research policy issues. These sessions may also provide for participants to discuss their workplace assignments in a group context and promote group learning.

The Cohort Moderator may wish to invite speakers or contributions from outside the participants and the Cohort Moderator should have well developed external research management networks. The Cohort Moderator will be expected to facilitate group discussion ensuring that all members of the cohort contribute to the group learning activity by ensuring that the group remains focussed on the topic under discussion and by promoting lively and interactive discussion. The Cohort Moderator will require good listening and communication skills and be able to provoke debate by asking open ended, relevant questions, encouraging participant to participant discussion and generally enhancing participant's understanding of the topic(s) under discussion.

The Cohort Moderator must have an excellent understanding of research management, national and international research policy and the content areas likely to be under discussion during workplace assignments. It is preferable that the Cohort Moderator has had extensive experience in a senior research management position.

It is important to note that ARMS has active Chapters in Australia, New Zealand and Singapore. We anticipate that the face-to-face components of the program will be delivered in mainland Australia. Nevertheless, Applicants should be aware that each cohort may include candidates from New Zealand and/or Singapore and we would expect successful Applicants to demonstrate that they are able to tailor their materials accordingly.

3.1. Proposal Price

ARMS will pay an upper limit of \$5,000 for each cohort moderated. This sum will cover six x 90 minutes discussion sessions plus preparation time and one face to face meeting with cohort, typically held in the Eastern states of Australia. The proposal must include costs relating to webinar/teleconferencing and any expectations of assistance from ARMS including travel and

accommodation costs to attend the first meeting of the cohort, typically in the Eastern States of Australia or costs for any invited speakers who may be part of the moderated sessions – to an upper limit of \$5,000.

4. FORM AND METHOD OF PROPOSAL

4.1. Request for Proposal

ARMS invites the Applicant to submit a proposal to undertake the services set out in the Proposal Conditions.

4.2. Format and Contents of Proposal

Applicants submitting a proposal for this work package should provide a written application addressing the following:

- Full trading name, address and contact details;
- A minimum five years demonstrated specialist knowledge and expertise in a senior research management role;
- Previous experience developing and/or delivering topics in the work package area;
- Previous experience in facilitating groups of people and teambuilding;
- A description of the training methodologies to be used in delivery of the program and any assistance they may require from ARMS in the delivery of work package 3;
- An understanding of the needs of the research management community and well developed networks that can be drawn on as needed to support this element;
- Details of past service to the ARMS community and/or expected future service to the ARMS community; and
- Names and contact details of two referees who may be contacted by ARMS.

The Proposal shall be prepared in accordance with the following requirements:

- Proposal must be in English;
- All prices quoted must be in Australian currency;
- All prices quoted must be GST inclusive;
- Proposals with alterations, measures or prices not clearly and legibly stated, may be excluded from consideration;
- Any alternations must be initialled by the same person who signs the Proposal and the Applicant; and
- Proposals must be a maximum of 10, A4 pages, including Proposal Form.

4.3. Completeness of Proposal

If the Proposal does not include all of the information in the format required by the Request for Proposal or is incomplete in any way, that Proposal may not be considered or may be assessed solely on the information received.

4.4. Presentation By Applicants

The ARMS Executive may request an Applicant to make a presentation of its Proposal but may not make the same request to all Applicants.

4.5. Contact Person

The only person authorised by ARMS to communicate with the Applicant is the Contact Person or President of the Society. Therefore, the Applicant cannot rely on communication with any

other person. Any communication with the Contact Person must be in writing (including email) and addressed to the Contact Person (refer to Part A for details).

4.6. Method of Lodgement

All Proposals are to be submitted by the Proposal Closing Date stipulated in Part A. Applications are to be submitted via email in PDF to the ARMS Contact Person – Maria Zollo, ARMS COO, email ARMS_COO@researchmanagement.org.au

Late Proposals will be regarded as non-complying Proposals and may not be accepted by the Society (although ARMS reserves the right, in its absolute discretion, to accept a late Proposal).

5. PROPOSAL ASSESSMENT

5.1. Proposal Assessment Criteria

Based on the information in Section 3, a proposal is required which:

- Provides demonstrated understanding of the needs of ARMS;
- Demonstrates the appropriateness of the delivery the Applicant proposes;
- Provides a detailed breakdown of costings, including estimations of expenses;
- Provides details of any subcontractors to be involved;
- Provides a detailed timing schedule;
- Details the staff and other resources to be made available;
- Details the type of information that the Applicant would require ARMS to provide; and
- Details any other matter of relevance.

The table below details the Proposal Assessment Criteria:

Criteria	Comment	Proposed Weight
Capability	Ability to deliver work package, track record of Applicant. Assessed against strength of provision of case studies, referees and response to Proposal Assessment Criteria.	30%
Reputation	Reputation of Applicant and track record – illustrated by impact of past activities through citation of examples	30%
Timeliness and Approach	Ability to meet timeframes and approach to the work packages. Assessed by response to Proposal Assessment Criteria.	20%
Cost	Competitiveness of cost. Assessed by response to Proposal Assessment Criteria.	20%

ARMS reserves the right to conduct referee checks for any shortlisted proposals.

5.2. Proposal Validity and Assessment Period

Proposals may be kept open for consideration during the Proposal Validity and Assessment Period.

Proposals may only be withdrawn during the Proposal Validity Period with the consent of ARMS; The Proposal Validity and Assessment Period may be extended by mutual agreement between ARMS and Applicant; and

ARMS will assess each Proposal within the Proposal Validity and Assessment Period.

5.3. Clarification

Where matters of significance make it necessary to amend any part of this Request for Proposal prior to the Proposal Closing Date, the amendments shall be advised as an “Addendum” forwarded by (or on behalf of) ARMS to Applicants, such Addendum may result in a change to the Proposal Closing Date as advised by ARMS.

5.4. Acceptance of Proposal and Proposal Negotiations

ARMS is not obliged to accept any Proposal.

If ARMS does accept a Proposal, it is not obliged to accept the lowest price Proposal.

ARMS may consider or accept, At ARMS sole discretion, any Proposal including without limitation a late Proposal or an Applicant who has failed to submit a Proposal in accordance with these Conditions.

No acceptance of a Proposal nor any invitation to negotiate or to make an offer will be effective to constitute a contract or to create any legitimate expectation on the part of the Applicant, unless a formal written agreement is entered into between the selected applicant and ARMS. Negotiations with a selected Applicant, it may, in its absolute discretion, decide to suspend, discontinue or terminate at any time.

ARMS will notify unsuccessful Applicants when a successful Applicant has been selected.

ARMS is not obliged to give any reasons for its selection or abandonment of this Process.

5.5. Short-Listing and Interview

The ARMS Executive will review all Proposals received by the Proposal Closing Date as stipulated in Part A. it will then determine which Applicants it may wish to invite to conduct a formal interview to determine which proposal is best fit against the evaluation criteria and within the fee structure of the Society

5.6. Best and Final Offer

Short-listed Applicants may be invited, as part of the process, to submit a best and final offer in relation to all or certain aspects of the Proposal. If ARMS chooses to provide Applicants the opportunity to submit a best and final offer, it is under no obligation to provide notification before the proposal Closing Date that such opportunity will be given.

5.7. Confidentiality and Intellectual Property

Information supplied by or on behalf of ARMS is confidential to ARMS and Applicants are requested to maintain its confidentiality. Conversely, ARMS also understands the need to keep

aspects of the Applicant proposal confidential, but reserves the right to disclose some of the contents only for the purpose of evaluation of that Proposal.

5.8. Intellectual Property

ARMS owns the Intellectual Property Rights in this Request for Proposal and any other documents provided in connection with this process. ARMS also owns the Intellectual Property for all training materials developed in relation to the delivery of this work package.

5.9. Contract Arrangements

Successful Applicants will be required to enter into a contract with ARMS agreeing the proposal price, deliverables and delivery timeline. Successful Applicants will be granted exclusive rights to deliver the work package, subject to satisfactory performance, for a period of three years. Successful Applicant(s), i.e. the Cohort Moderator must also be willing to attend part of the workshop in order to connect and meet with the cohort, the cost of attendance (airfare, accommodation, incidentals) must also be factored into the budget proposal – also refer to section 5.10 below.

5.10. Cost and Presentation of Proposal

Each Applicant is responsible for the cost of preparing and submitting its Proposal and all other costs arising out of this process, including travel costs associated with attending an interview, if required.

ANNEXURE A: ARMS PROPOSAL FORM