

LINC with Sellafield

Opportunity 11

Work Package 11/2019 – Provision of Retirement Planning Training



THE OPPORTUNITY

Work Package

Under the Sellafield Ltd Terms and Conditions it is detailed that employees will have access to an independent financial adviser and have the opportunity to attend a “Planning for Retirement” seminar prior to their normal pension age.

Statement of Requirements

We are looking for a course to address both the life style change and the financial considerations that the transition to retirement brings for individuals.

The sessions are to be held on the Sellafield Site (B111 Training Centre) in West Cumbria with a number of sessions also being arranged at Hinton House in Warrington.

Deliverables and objectives for the training:

1. To highlight and explore a broad range of life and financial issues that might change when delegates retire and to encourage them to prepare for those changes as best they can.
2. To consider the emotional impact of retirement and consider how delegates can best deal with any anxiety or apprehension they might be experiencing.
3. To consider what retirement means to delegates and who else is likely to be impacted so that they are confident in managing positively any change in relationships with others that their retirement might bring about.
4. To consider what delegates might miss from leaving work behind, and help them to identify ways in which they might deal with that loss.
5. To help delegates identify and prioritise those aspects of retirement that may concern them the most and to signpost them to the additional sources of information, support and guidance that is available to them.
6. To enable delegates to better understand their financial position so that they can make informed choices as to what they need to do to ensure that their financial planning is robust.
7. To help delegates develop an action plan so that they can become more confident that they are well prepared for the adjustments they will have to make in order to achieve the lifestyle in retirement that they aspire to.

Each session should run for one day from 8:30 – 15:30, and each session will have a maximum of 20 attendees.

The estimated expenditure for this requirement is £25k per annum.

The duration is 12 months initially with an option to extend to a maximum of 3 years' duration, on a 1 + 1 + 1 basis.

Proposed Terms and Conditions:

Any contract (if any) placed subsequent to this challenge will be subject to the following standard form of contract: **CFMT 104 LINC Professional Services.**

Proposal Requirements

SME's who are interested in this opportunity please provide a proposal addressing the following:

1. A statement demonstrating understanding of the Statement of Requirements, how it is envisaged they will be delivered and why you believe you are best placed to support Sellafield Ltd on this opportunity. This should include your businesses number of years' experience of delivering similar courses, a typical number of each course delivered per year and the proposed location where the course would be delivered. - **No more than 3 sides A4**
2. Details of the relevant experience and qualifications of the tutors proposed to deliver the training. **No more than 2 sides A4**
3. A proposed maximum target cost per session with an overview of what is included in the price.

Deadline

We will be holding an open telephone conference at **10:00 on 3rd April 2019** for any of our registered LINC companies interested in submitting a proposal to ask questions. To register your interest in taking part in the call please email linc@sellafieldsites.com and we will provide you with dial in details.

This opportunity is only available to SMEs registered on LINC at the time of publication of this challenge (11/2019) – Registration for future challenges remains open.

To submit a proposal for this work package please upload all attachments to CTM no later than **17:00 (GMT) on 23rd April 2019**.