PART A: PROPOSAL DETAILS

Services Requested:	Development and Delivery of Core Program - Leadership, Management and Strategic Thinking Skills
Contact Person:	Maria Zollo, ARMS Chief Operating Officer
Proposal Opening Date:	April 17, 2023 (Monday)
Proposal Closing Date:	29 May 2023 (Monday) by 5 PM AEST
Proposal Validity and Assessment:	30 May – 26 June 2023
Proposal Delivery Method:	Proposals to be emailed to ARMSCOO@researchmanagement.org.au
Enquiries to:	ARMSCOO@researchmanagement.org.au

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1. PRELIMINARY
   1.1. Definitions

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

Accreditation Council is an independent body responsible for overseeing quality standards of module and other programs and providing and delivery agents.

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

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

Business Day means a day other than a Saturday, Sunday, or public holiday in South Australia.

Body of Knowledge is a written document developed by the Successful Applicant which sets out the terms, learning objectives and references for the development and Delivery of Core Module Leadership, Management and Strategic Thinking Skills.

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.

Program means the program on the Leadership, Management and Strategic Thinking Skills (Element 1) of the Established Level Accreditation Program.

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

Proposal Opening Date means the official opening date for proposals.

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

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

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

The ARMS Board means the governing body of ARMS which is responsible for the control and direction of the Society including it 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 the Australasian association for Research Management Professionals[1]. ARMS aims to create an internationally connected community of research management professionals who operate at the highest standards to influence, support and enhance the global delivery of research excellence.

The Society values: equity and diversity in the profession of research management; a strong, vibrant profession, high standards of research governance including the uncompromising protection of the integrity and the ethics of research and the profession of research management as integral to the research enterprise.

ARMS comprises over 3900 members from universities, independent research institutions, government and health research organisations from across the Australasian region including Australia, New Zealand and Singapore.

The Society has 10 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. It is governed by an Executive with each Chapter also having local leadership groups – visit the website for full details www.researchmanagement.org.au

ARMS runs a flagship conference for its members supplemented by a number of local Chapter events and other speciality PD, education and training events and workshops annually.

2.1. Points Based Accreditation Program Overview

A key strategic priority of ARMS is to support the development of excellent research management professionals by providing a diverse and broadly accessible accreditation program, and other professional development opportunities. The Accreditation Council considered changes to ARMS' current accreditation program structure, namely accreditation at the Foundation and Established/Advanced level and recommended a framework enabling individuals to choose their own accreditation pathways by selecting programs either from within the current suite of ARMS' offering or approved external programs which will provide a meaningful and relevant pathway for upskilling and career progression. This culminated in the release of a new points-based model of accreditation.

- **Pathway 1: Foundation Level (25 points)** – The Accreditation Council approved a model of assigning 25 points to candidates that had completed the current **Foundation Level Accreditation Program** (including the final assessment). These points may be used as credit for pathways 2 and 3 and that there will be no impact on individuals currently completing pathway 1: Foundation Level.

- **Pathway 2: New Established Level (100 points)** - The Accreditation Council approved a model where an individual accumulating 100 points would achieve Accreditation at the Established Level. These points *may include* the completion of Pathway 1: Foundation Level (25 points). Elements of the previous **Advanced Level Accreditation** may be utilised as points toward the accumulation of 100 points (some conditions may apply). The Accreditation Council

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[1] Research Management Professionals are defined as individuals who provide strategic, management, technical, administrative, or clerical assistance to support the research endeavour.

has ruled that overall, a minimum of 75 points out of the 100 accumulated points *must be drawn* from <u>ARMS programs</u> that have an assessment component.

- **Pathway 3: Advanced level (150 points) –** The Accreditation Council approved a model where an individual accumulating 150 points would achieve Accreditation at the **Advanced Level**. Points *must be drawn* from the completion of Pathway 2 (100 points), with the remaining points drawn from the completion of a workplace-based assessment (50 points).

2.2. Foundation Level Accreditation Program

In 2013, the Society introduced its Foundation Level Accreditation Program offering a wide variety of modules of leaning. This program is designed for:

(a) Persons new to research management, i.e., 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.

In order to achieve FLAP 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 management professional.

The quality and standards of the FLAP are overseen by an arms-length Accreditation Council. The Accreditation Council plays an important role in the accreditation process, overseeing quality standards of module content and delivery agents and providing a measure of independence from the ARMS Board over accreditation recommendations.

2.3. Established Level Accreditation Program

The Established Level Accreditation Program or ELAP is designed for:

- Mid to senior level Research Managers who have worked in the sector for 5 or more years; or

- Senior academics and professional staff who are transitioning into a senior Research Management role.

The program is designed to enhance the leadership, management, and content skills of research management professionals to become more effective research leaders in the rapidly evolving research and innovation sector. The program comprises of a mix of taught material, group discussions and written assignments. Successful conclusion of the program occurs when candidates have attained 100 points which then allows participants to be designated Accredited Research Manager (Established) or ARM(E). There are three compulsory elements of the ELAP as follows:

1. Leadership, Management and Strategic Thinking - A comprehensive Group Learning (equivalent to 16 contact hours) workshop which focuses on leadership, management, and strategic thinking skills. This program is assessed and has a value of thirty (30) assessed points.

2. Three (3) electives - (equivalent to one day contact) from a selection of specialist areas providing deeper knowledge of the topic chosen, and implementation of a research management setting. Each elective is assessed by an authorized Service Provider and has a value of ten (10) assessed points. A list of electives is available on the ARMS website.

3. Attendance and participation in a minimum of nine (9) 1-hour, regularly scheduled, group learning discussions. This element of the program is non-assessed and will accrue nine (9) non-assessed points.

ARMS offers a variety of other non-compulsory programs, both assessed and non-assessed which can be used for this accreditation program. Details can be found on the ARMS website.

To successfully complete this program leading to accreditation at the Established Level, participants must complete 100 points of activity over a three-year period including completion of any mandatory programs. A minimum of 75 points must be completed in ARMS assessed programs. Assessment methods will vary between programs with some requiring written assignments and others being assessed on/during participation. The assessment mechanism for each program will be specified in the program description.

> As part of this call for tender, the Society is seeking proposals to cover the Leadership, Management and Strategic Thinking element (Element 1) of the ELAP for approximately 16 contact hours of delivery.

2.4. Advanced Level Accreditation Program

Accreditation at the Advanced Level is the highest level offered by ARMS. It indicates that graduates are both knowledgeable in their research management role and skilled in applying research management principles in their workplace. Attaining the Advanced Level Accreditation allows graduates to use the post-nominal ARM(A). It is awarded to candidates who attain **150 points** through professional development programs including **100 ELAP points** and an additional **50 points** from a capstone workplace-based assignment.

3. DESCRIPTION OF PROPOSAL FOR LEADERSHIP, MANAGEMENT AND STRATEGIC THINKING PROGRAM

Successful Applicants will be expected to develop the content for the delivery to a cohort of Research Management Professionals in the second half of 2023 (dates to be negotiated with the successful Applicant). This timeline also includes at least two months (2) for the ARMS Accreditation Council to assess and approve the content to be delivered by the Successful Applicant.

The content of the Leadership, Management and Strategic Thinking Program will be delivered online and can be scheduled over multiple delivery dates and times (to be negotiated between the Society and the successful Applicant).

The Successful Applicant will be granted sole delivery rights for delivery of the Leadership, Management and Strategic Thinking Element of the ELAP for a period of three years, subject to satisfactory performance.

Applicants will be responsible for developing a post workshop assessment as well as marking the assessment for each participant. The post workshop assessments will be coordinated via the ARMS Executive Office with the Accreditation Council providing quality assurance and oversight of assessment processes, standards, and results. Minor edits to content may be required following the post workshop assessments.

The Leadership, Management and Strategic Thinking Workshop Skills (content equivalent to 16 contact hours) is expected to support, enhance, and expand the skills of aspiring leaders in the research management profession. Topics to be included as part of the workshop include:

- Leadership characteristics and styles.
- Situational Leadership Models including personal awareness, emotional intelligence etc.
- Building and leading effective teams in Research Management, incorporating dealing with people, team building and morale, developing culture, institutional communication, developing effective business processes etc. in an evolving research environment.
- Institutional and political awareness, including managing expectations, managing up and managing by influence,
- Effective development and implementation of institutional and your research business unit* strategy, including balancing strategy and operations; understanding accountability, responsibility and authority; defining roles, goals and priorities for effective team performance, monitoring and evaluation of institution and business unit performance, including how to work effectively with and influence other functional areas in your organisation.
- Effective external stakeholder management and influence (industry, government, other organisations); and
- Understanding and managing your career trajectory.

Not included in the core program above are issues such as Human Resource Management, financial awareness and IT systems. It is expected that these will be developed via individual institutional programs.

*Special Note – while business unit might commonly be viewed as a research office, participants may come from a variety of settings and roles

3.1. Statement of Expectations in relation to delivery

It is anticipated that this core module will be delivered online to cohorts of participants, expected to be approximately 12-16 persons per cohort. The successful Applicant is expected to:

- Deliver a workshop that is interactive and engaging for all participants (which may include co-opting invited speakers as required).
- Includes time for breakouts and case study discussions.
- Develop a written body of knowledge (recommend up to a maximum of 20 pages) which includes all pre-reading references for cohort members.

It is expected that the program will attract up to two (2) cohorts per year subject to sufficient enrolments. Workshop participants will come from a variety of organisations and roles but are expected to have a minimum of five years' experience in the research management profession.

It is important to note that each cohort participating in the Leadership, Management and Strategic Thinking Program may include candidates from Australia, New Zealand and Singapore and we would expect the successful Applicant to demonstrate that they are able to tailor their materials accordingly.

3.2. Proposal Price

ARMS will pay the successful Applicant AUD$10,000 GST inclusive for each time the Program is delivered to a cohort. The successful Applicant will be expected to accommodate their delivery costs within this price.

3.3 Applicant credentials and reputation

Applicants will be expected to demonstrate at least five years relevant professional experience relevant to one or more of the topic areas above. Applicants should also have a solid understanding and ideally significant experience in research management leadership.

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 – Part B.

4.2. Format and Content of Proposal

Applicants (which may include Groups), submitting a proposal (refer to ARMS Proposal Form) for development and delivery of content for should provide a written application addressing the following:

- Full trading name, address and contact details.
- Credentials of the Applicants (and other members if a Group) demonstrating a minimum of five years demonstrated specialist knowledge and expertise relevant to the development of the work package.
- Previous experience developing and/or delivering topics in the work package area.
- A proposed course outline including:
  - o topics and content to be covered, intended learning objectives for 16 delivery hours (ideally scheduled over multiple days);
  - o details of who will deliver the content (if more than one person);
  - o indicative timeline/ schedule for delivery;
  - o a description of the training/ learning approaches, tools and methods to be used in delivery of the program; noting that a core goal is to deliver the content in a stimulating and interactive format wherever possible.
- Details of what is expected to be included in the body of knowledge.
- An understanding of the needs of the research management community and how the topic area will be tailored to this community.
- Details of past service to the profession of Research Management.
- 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 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. 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).

4.5. 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 ARMSCOO@researchmanagment.org.au – refer to submission timelines, section 4.7.

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).

4.6. Submission Timelines

Date	Activity	Additional Information
17 April 2023 (Monday)	Call for Proposals.	Tender information to be circulated widely.
29 May 2023 (Monday) – 5 PM AEST	Proposal submissions close.	Proposals to be submitted to ARMSCOO@researchmanagement.org.au
30 May – 26 June 2023 (approx. 4 weeks)	Proposals to be assessed out of session by the ARMS Accreditation Council.	
By 3 July 2023 (Monday)	Successful Applicant to be made a formal invitation including terms and conditions of engagement. Successful Applicants to submit more detailed information as instructed.	
4 August 2023	Successful Applicant to provide a copy of the body of knowledge (including pre-reading materials) and the presentation slides and end of workshop assessment for review by the ARMS Accreditation Council.	Documentation to be submitted to ARMSCOO@researchmanagement.org.au
From 7 August 2023 - 11 September 2023	ARMS Accreditation Council to review final documentation by the Successful Applicant.	
w/c 11 September 2023	Feedback from the ARMS Accreditation to the Successful Applicant.	
November 2023	Delivery to first cohort	To be negotiated.

5. PROPOSAL ASSESSMENT

Applications will be assessed by a working party comprising members of the ARMS Accreditation Council and the ARMS Professional Development and Accreditation Committee. Refer to submission timelines (Section 4.7).

5.1. Proposal Assessment Criteria

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.
- Details any other matter of relevance.

The table below details the Assessment Criteria

Criteria	Comment	Proposed Weight
Capability	Ability to deliver Element 1 Leadership, Management and Strategic Thinking, track record of Applicant. Assessed against strength of provision of case studies, referees and response to Proposal Assessment Criteria.	40%
Reputation	Reputation of Applicant and track record – illustrated by impact of past activities through citation of examples	40%
Timeliness and Approach	Ability to meet timeframes and approach to the Program. 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 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.

ARMS will assess each Proposal within the Proposal Validity and Assessment Period – refer to submission timelines (section 4.7).

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.

ARMS may consider, accept or reject, at its 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.

Also refer to submission timelines (section 4.7)

5.5. Short-Listing

The ARMS Accreditation Council will review all Proposals received by the Proposal Closing Date (refer to submission timelines, section 4.7).

5.6. Confidentiality

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.

5.7. 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.

5.8. 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.

5.9. Cost and Preparation 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.