

Tender Specification

Tender Title	PR2003 – Velocity ERDF Project - Summative Assessment
Procurement Process N°	PR2003
Issue of Specification	26/06/2018
Closing Date	01/08/2018
This tender opportunity is part funded by ERDF and form part of the Velocity ERDF Project.	

About us

The South East Midlands Local Enterprise Partnership (SEMLEP) was set up in May 2011 as one of 38 Local Enterprise Partnerships (LEPs) in England. Established by the Coalition Government. LEPs play a central role in determining local economic priorities and undertaking activities that drive economic growth and the creation of local jobs. More information can be found on its website www.semlep.com

SEMLEP is formed as a company limited by guarantee. It has many partners including 14 local authorities, local businesses, business organisations and many other private and public organisations. In addition to the work that SEMLEP carries out we also have a business support arm, called Velocity Growth Hub which provides free business support to small and medium-sized enterprises (SME) www.VelocityGrowthHub.com

Velocity Growth Hub was established by [SEMLEP](http://www.semlep.com) in 2014 with funding from the Regional Growth Fund through Lancaster University. The Velocity Growth Hub aims to connect small and medium sized businesses in the South East Midlands with tailored support to enable them to grow.

The main elements of the Growth Hub are:

- A business information portal
- A team of seven business advisers
- Revenue and capital grants for business support
- A programme of business workshops

- Focussed business development within the four showcase sectors identified by SEMLEP

Overview

SEMLEP wishes to appoint a sub-contractor to evaluate the effectiveness of SEMLEP's Growth Hub ERDF Project through ERDF summative assessment.

As part of the contractual requirements of ERDF funding, SEMLEP is required to conduct an evaluation of the project, known as a "Summative Assessment".

The Velocity Growth Hub project has provided a targeted programme of advice, workshops, masterclass, events and financial support designed to encourage and assist SMEs in the South East and South Midlands. The project aims to enhance the capability and capacity of SMEs.

The assessment is intended and required to provide insights into programme performance, in order to:

- Enhance implementation
- Provide reliable evidence of project efficiency, effectiveness and value for money.
- Provide insights into what and why interventions work (or not) and lessons for the future.

Requirements

ERDF have published updated guidance on the project evaluation summative assessments which all assessments must comply with:

ESIF GN-1-011 – ERDF Summative Assessment Logic Model

The basis of the assessment is taken from a simple logic model that Velocity Growth Hub have completed in 2015, the sub-contractor will be required to refresh this Logic Model, to be in line in line with MHDCLG template (**Appendix 1 :ESIF-Form -1-011 – ERDF Summative Assessment Logic Model v2**) the sub-contractor will be required to produce this document in high level. The specific objectives of the project are:

- To contribute to net increase in 41,500 new jobs by 2020.
- To contribute to 9,700 new business by 2020.
- To increase number of SME's being referred to the specialist high growth support provided by the National Business Growth Service.
- To simplify access to the right business support for SME's.

ESIF GN-1-033 – ERDF Summative Assessment Guidance

This document outlines the scope and purpose of the assessment, required contents and high level instructions.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/705888/ESIF-GN-1-033_ERDF_Summative_Assessment_Guidance_v1.pdf

ESIF GN-1-034 – ERDF Summative Assessment Guidance Appendices

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/705889/ESIF-GN-1-034_ERDF_Summative_Assessment_Guidance_Appendices_v1.pdf

Appendix A relates to the logic model (mentioned above)

Appendix D - Table D.4 - Business Advice, Guidance and Finance for Established SMEs : Relevant to SEMLEP.

Appendix F -Summative Assessment Final Report : This section is key as it outlines the required structure for the report.

Appendix 2 : ESIF Form 1-014 – Summative Assessment Report Summary

The summative assessment report summary must be produced using this standard template.

Appendix 3 : ESIF-GN-01-013

The above guidance documents are subject to change – Suppliers are expected to check and comply with the latest ERDF as/if amended.

The summative assessment aims to identify and attribute changes achieved by the programme. As detailed within the ERDF guidance (links below), all assessments will need to cover the following key themes:

- **Relevancy and consistency** of the programme - in light of any changes in policy or economic circumstances during its delivery period and appropriateness of programme design.
- **Progress** of the programme against contractual targets – any reasons for under / over-performance and expected lifetime results.
- **The experience of delivering and managing** the programme and lessons emerging from this.

- **The economic impact of the programme** – including intended and actual outcomes and impact.
- **Assessing value for money** and cost-effectiveness of the programme in light of its intended and unintended outcomes and impact therefore its value for money.
- **Conclusions and lessons learnt:** Overall conclusions based on analysis of above areas.

As noted in ERDF Programme Summative Assessment Guidance ESIF-GN-1-034 – Appendix F, the final summative assessment report will need to cover each of the above themes.

Suppliers are encouraged to be innovative in their proposals and design of the assessment to reflect the nature of the programme, suggesting any additional insights and added value they may be able to provide.

Scope of Project

Following on from the Inception Meeting we are looking for the successful applicant to produce an interim report using analysis of business data collected by SEMLEP's growth hub from Jan 2016 to Jun 2018.

Progress meetings will take place monthly and where appropriate you may be invited to present your findings to key stakeholders, for example Growth Hub Board members or growth hub staff.

We estimate that at least 4 meetings will take place at our office in Cranfield.

A final report that will include 3 years of project must be provided by 10/01/2018, this report will include lessons learned and recommendations.

Application Form

You will find attached to this brief, SEMLEP's tender application form that must be completed and sent by email to procurement@semlep.com by the deadline stated on the procurement process timescale section below, together with any additional information that you believe will be relevant to this tender opportunity.

Please read carefully the instructions and answer all questions on the application form. Ensure VAT is included, as instructed in the pricing sheet.

If you have any queries regarding completion of the response please email procurement@semlep.com

Tender instructions

Suppliers must not modify the file format of the Application Form.

Please note we **do not** want hard copies to be sent in the post.

We reserve the right to distribute the response provided to your question to other interested applicants if required under FOI legislation

Please send your completed forms and any supporting information electronically to procurement@semlep.com with the name of the tender in the subject header. Please note we **do not** want hard copies to be sent in the post.

If you have any queries, please contact us on 01234 436100.

The Quotation response must include:

- SEMLEP's Open Tender Application Form fully completed
- Supporting information

Please note:

All tender submissions may be subject to a credit check.

All the questions received will be answered and published on the SEMLEP website on the Tender page.

We only accept submissions in Word or PDF of less than 10MB.

SEMLEP's Application Form and Terms and Conditions are attached.

Our tender evaluation panel will assess received applications as per the selection and award criteria stated below.

Selection and award criteria introduction

Tender applications will be assessed in accordance with the Selection Criteria that assess the ability of the tenderer to perform a contract based on qualitative information related to the economic and financial standing of the applicant, suitability, equalities and insurance.

Stage One - Selection Criteria

Section 3 to 5 of the application form is Part A. Questions 1, 3, 5, 6 and 7 are pass / reject. If you fail these questions, your application will be rejected.

Stage Two - Award Criteria

If your application passes on "Part A" it will progress to "Part B" that is the Award Criteria. The applications will be scored under the Award Criteria set out below:

AWARD CRITERIA EVALUATION

Criteria	Score	Score	Score	Score	Weighing (%)	Weighted Score
Price: It is necessary to illustrate the value for money in the proposal and how your proposal will deliver the best value per £ of public funds. Please include a breakdown of price including day rate and amount of days required e.g. interviews, base line reports.	Exceptional, covered thoroughly, prices represent good value for money and better value for money than other suppliers. Bidder provides a breakdown of their charges and a plan showing expected Outputs over the duration of the Contract Score 8-10	Average. Brief covered adequately, Prices are reasonable. Bidder provides a breakdown of their charges and a plan showing expected Outputs over the duration of the Contract. Score 4-7	Bidder meets or does not meet requirements of brief. Little or no information showing the breakdown of the Bidder's charges and/ or the expected schedule of Outputs Score 0-3		30%	
Ability to deliver the required service quality and within timescales: Please provide details of how you intend to deliver the contract. Please clarify methodology to be used and how you will ensure that the	Exceptional, covered thoroughly, Direct experience of delivery on ERDF projects. Clearly demonstrates an understanding of SMEs and the capacity and capability to deliver Outputs within required timescales. Score 8-10	Average. Brief covered adequately, Some evidence of understanding of ERDF projects. Evidence of understanding and supporting SMEs. Evidence suggests could have the capacity and capability to	Bidder does not meet requirements of brief. Bidder has little or no experience of delivery on ERDF projects and/or fails to demonstrate a good		30%	

service will be delivered based on the estimated timescales provided on the tender process and assessment timeframe		deliver the Outputs. Score 4-7	knowledge of the SME market and/or has limited capacity/ capability to deliver the required outputs on time. Score 0-3			
Overall quality of submission: Give clarity of offer and structure of proposal.	Exceptional, covered thoroughly, have provided a very good response, covered the structure of proposal and have provided 2 referees. Score 8-10	Average. Brief covered adequately, haven't provided 2 referees or have not provide a good structure proposal. Score 4-7	Bidder meets or does not meet requirements of brief. Score 0-3		20%	
Quality of delivery: Provide details about the quality of delivery indicating key members of the team that will be working on the project and relevant experience in delivering business support.	Exceptional, covered thoroughly, have provided a satisfactory information of the key members that will be involved on the project delivery and their relevant experience compared to the requirements of the brief. Has provided very good response, covered the	Average. Has provided adequate / fair information regarding the key members that will be involved on the project delivery and their relevant experience compared to the requirements of the brief. Score 4 -7	Poor, have not provided satisfactory information. Score 0-3		15%	

	structure of proposal. Score 8-10					
Social Value: The proposal needs to show the social value of the contract and how your business contributes to the society and community in which you operate.	Exceptional, covered thoroughly, providing apprenticeship and placements, helping local charities and other community work. Score 8-10	Average. Brief covered adequately, Do community and charity work but do not provide apprenticeship/ placements or vice versa. Score 4-7	Does not meet requirements of brief. Score 0-3		5%	
			Total		100%	

Indicative Budget

The total budget is £20,000 including VAT. All prices submitted shall be in Pounds Sterling, including any extra costs and VAT.

Payment terms

SEMLEP pay invoices payment terms for approved invoices is 30 days from date of receipt of invoice.

Tender process - Timescale

Activity	Date
Tender issued	26/06/2018
Tender closing date	01/08/2018
Compliance Check/ applications assessment	02/08/2018
Appointment of successful bidder	03/08/2018

Inception Meeting	13/08/2018
Contract start date	14/08/2018
Latest financial completion date	15/12/2018
Contract end date	15/01/2019

Assessment timeframes

The supplier will be expected to undertake a programme evaluation and provide a final summative assessment report together with a summary in line with the requirements of the ERDF summative assessment guidance and further requirements noted within tender document. Timeframes are as follows:

Activity	Date
Inception meeting	13/08/2018
Contract start	14/08/2018
Data collection, finalisation of methodology and logic model	07/09/2018
First draft of interim progress report and summative assessment completion	10/10/2018
Final report (3 years data) and final summative assessment ready for submission to SEMLEP/MHDCLG	10/01/2019

Contact details

All communications throughout this process should be channelled through : procurement@semlep.com

Copyright and Intellectual Property

In all instances, full copyright of the completed summative assessment will pass to the client, and become SEMLEP's copyright assets upon payment of invoice. The supplier will waive all moral rights which they may now have or in the future (including, but without limitation) any of their rights under Section 77 and 80 of the Copyright, Designs and Patents Act, 1988, or similar laws or jurisdictions.

SEMLEP and its associated companies will have the right to use and reproduce the commissioned work without further charge or jurisdiction.

The appointed supplier will have limited permission to use copies of work produced in the execution of this appointment for SEMLEP in order to promote themselves, using a portfolio or similar promotional tool.

Terms and Conditions

All tender submissions may be subject a credit check.

All the questions received will be answered and published at SEMLEP website under Tenders page.

We only accept submissions in Word or PDF of less than 10mb

SEMLEP's Application Form and Terms and Conditions are attached.

The contractor will be managed in a day to day basis by the Project Manager at SEMLEP, the project is governed by the Velocity ERDF Project Board.

Documents Attached to this Tender opportunity:

Description
Tender application form
SEMLEP's T&C
ESIF Form 1-014 – Summative Assessment Report Summary

Freedom of Information:

Information in relation to this tender may be made available on demand in accordance with the requirements of the Freedom of Information Act 2000.

Tenderers should state if any of the information supplied by them is confidential or commercially sensitive or should not be disclosed in response to a request for information under the Act. Tenderers should state why they consider the information to be confidential or commercially sensitive. This will not guarantee that the information will not be disclosed but will be examined in the light of the exemptions provided in the Act.

It is important to note that information may be commercially sensitive for a time (e.g. during a tender process) but afterwards it may not be. The timing of any request for information may be extremely important in determining whether or not information is exempt. However, Tenderers should note that no information is likely to be regarded as exempt forever.

SUMMARY OF INELIGIBILITY CONDITIONS

- a) is bankrupt or is being wound up, where his affairs are being administered by the court, where he has entered into an arrangement with creditors, where he has suspended business activities or is in any analogous situation arising from a similar procedure under national laws and regulations;
- b) is the subject of proceedings for a declaration of bankruptcy, for an order for compulsory winding up or administration by the court or of an arrangement with creditors or of any other similar proceedings under national laws and regulations;
- c) has been convicted by a judgment which has the force of res judicata in accordance with the legal provisions of the country of any offence concerning his professional conduct;
- d) has been guilty of grave professional misconduct proven by any means which the contracting authorities can demonstrate;
- e) has not fulfilled obligations relating to the payment of social security contributions in accordance with the legal provisions of the country in which he is established or with those of the country of the contracting authority;
- f) has not fulfilled obligations relating to the payment of taxes in accordance with the legal provisions of the country in which he is established or with those of the country of the contracting authority;
- g) is guilty of serious misrepresentation in supplying the information required under this Section or has not supplied such information;
- h) has been the subject of a conviction for participation in a criminal organisation, as defined in Article 2(1) of Council Joint Action 98/733/JHA;
- i) has been the subject of a conviction for corruption, as defined in Article 3 of the Council Act of 26 May 1972 and Article 3(1) of Council Joint Action 98/742/JHA3 respectively;
- j) has been the subject of a conviction for fraud within the meaning of Article 1 of the Convention relating to the protection of the financial interests of the European Communities;
- k) has been the subject of a conviction for money laundering, as defined in Article 1 of Council Directive 91/308/EEC of 10.6.1991 on prevention of the use of the financial system for the purpose of money laundering. Statement confirming that items (a) to (k) do not apply.

Please remember to email this response to procurement@semlep.com before the deadline specified in Timescales.

END OF TENDER DOCUMENT