



INVITATION TO TENDER FOR THE PROVISION OF BUSINESS ADVICE SERVICES

including instructions to tenderers

Important note re process

The Chamber is not a contracting authority. This procurement is accordingly not subject to the requirements of EU public procurement law or the EU Treaty Principles relevant to public procurement, and, to the extent that any aspect of this procurement process which might bear any resemblance to a public procurement process, any such resemblance does not amount to a commitment to be bound by EU public procurement law and does not signify that such law applies.

Aims and objectives

This invitation is issued by Cumbria Chamber of Commerce/Cumbria Business Growth Hub. It covers business advice for the following initiatives delivered within its Cumbria Business Growth Hub umbrella:

- ERDF Growth Hub project (including supply chain)
- ERDF BSUS Business Start-Up Support project
- New Enterprise Allowance
- Other potential business support projects/initiatives

We are looking to renew our pool of experienced business advisers (individual advisers and/or specified individuals within an organisation), both generalist and specialist, to carry out business reviews/training needs analyses, develop action plans and deliver advice and coaching to businesses (primarily small and medium sized businesses [SMEs]) and/or potential start-ups in Cumbria. This will be a flexible pool of contracted advisers, drawn on as needed depending on factors such as levels of demand, client needs and preferences, experience and specialisms.

The pools may also be used for other similar business support projects.

Note that this tender is to replace the existing pool for the relevant projects. Advisers already contracted must reapply if they wish to continue to work on these projects and/or to work on future projects in the next four years.

Pools and lots

Pools are as follows:

- Pool 1 - Start-up and young businesses
- Pool 2 - Existing businesses – ERDF eligible

For each pool lots will be:

Lot 1 General (including reviews/diagnostics, business planning and strategy), Lot 2 Marketing, Lot 3 Digital marketing Lot 4 ICT, Lot 5 Finance, Lot 6 Sales & pricing, Lot 7 People & productivity through people, Lot 8 Funding sources &



submissions, Lot 9 Supply Chain bidding/tendering, Lot 10 Business planning/future planning/potential for growth

Background

The ERDF BSUS start-up project encourages entrepreneurship and assists individuals and groups looking to start in business and young businesses in their first three years of trading. It offers training needs analyses/diagnostics, advice, training, workshops, events, subsidies and resources tailored to client needs. Advice covers helping clients to explore potential start-up, diagnosis of needs, general advice on starting-up and running a young business and advice on the range of specialisms set out in the Lots above. The project operates throughout Cumbria, although the offer varies in different areas due to the funding mix.

The ERDF Growth Hub project supports eligible SMEs looking to grow and enhance their competitiveness, productivity and profitability. It offers business reviews/diagnostics, advice, networking, workshops, online resources, specific programmes and access to subsidies, all tailored to business needs, as well as referrals to other support. The project operates countywide, although the offer varies in different areas due to the funding mix.

The New Enterprise Allowance is a DWP initiative providing workshops and advice to support unemployed people to start in business and people on benefits who are in business but not yet achieving their Minimum Income Floor.

Other business support projects vary depending on the specific contract.

Specific requirements

Advisers will work under the management of the relevant Project Manager or other designated member of staff.

Advisers will be responsible, as part of ERDF intensive or other assists, for activities including:

- carrying out training needs analyses/business reviews and developing relevant action plans with clients (action plans should include the range of support through the project appropriate to that client plus relevant referrals to other support)
- delivering generalist and/or specialist advice and coaching to businesses (as highlighted in the Lots)
- assisting with subsidy applications
- working with clients referred to them and bringing eligible clients proactively to the project
- for BSUS, outreach activity to encourage interest in self employment
- representing the project(s) at relevant events when requested
- completing all project paperwork, fully and correctly, and submitting it in a timely manner, including client business plans and/or completed diagnostics where relevant
- following up clients to ensure their smooth and timely progress through support and that assists are completed in a timely manner, where relevant providing account management



- gathering evidence, outputs, outcomes and results
- participating actively in relevant Growth Hub web portal forums, driving relevant discussion and engagement
- actively encouraging client participation in relevant forums within Cumbria Business Growth Hub, including where relevant the start-up forum(s), and usage of other portal resources
- making clients aware of the wider support on offer and referring them actively into this

Advisers must ensure that all relevant project paperwork is fully and correctly completed, including required signatures, and provided to the relevant Chamber contact in a timely manner, including provision of relevant evidence, outputs and outcomes.

Advisers must also ensure that clients they are working with progress through support in a timely manner, including provision of relevant evidence, outputs and outcomes.

Timescales

The current ERDF BSUS project runs until approximately June 2023.

The current ERDF Growth Hub project runs until June 2023.

The current New Enterprise Allowance project is open to new referrals until at least March 2021.

Other projects are subject to varying arrangements with funders, with local authority contracts generally operating on an annual basis.

It is intended that contracts will start from 9th March 2020.

Note that there will be no commitment to a particular number of hours under the contracts, either in total or in any given period.

Payments

Payment will be in arrears against monthly invoices itemising authorised work carried out during the month, and subject to provision of satisfactorily completed paperwork and output/outcomes/results gathering.

The rates for these contracts are set out in Appendix A of the sample contract provided as Schedule G.

Other payments may be agreed by exception.

Advisers are expected to arrange client meetings and journeys where possible to minimise travel requirements. Where this is does not appear to be the case then the Chamber may, at its absolute discretion, adjust payments in relation to



travel.

Drawing advisers from the pool

Advisers will be drawn from the relevant pool in response to client needs as follows:

- a. Advisers selected for the relevant pool will be ranked in line with their scoring through this procurement process in each lot highlighted in their application in each geographic area they have indicated they would be happy to cover. The highest scoring adviser(s) will be ranked one, the next two, etc.
- b. Where an adviser brings the client to the project, that adviser will normally work with the client in the first instance, if they choose to do so. This may change if the action plan produced then indicates other need(s), in which case adviser(s) will be allocated as set out below.
- c. Advisers will be drawn from the list for the relevant lot applicable to the client location and taking into account value for money (including travel costs), any gender preference expressed by the client, any within lot specialisms and specific experience/expertise where relevant. The adviser ranked one will be approached first, giving a timescale for response. If he/she is not available within the appropriate timescale then the adviser ranked two will be approached, and so on. Where advisers are scored equally and rank equally on value for money, all will be approached concurrently and the work awarded to the first to respond.
- d. With reference to travel costs, advisers within the 50 miles round trip no mileage costs area of the client will be contacted first in rank order (taking into account other factors as above), then those outside the 50 miles taking into account ranking and distance (again taking into account other factors as above).
- e. Note that an adviser will be excluded from allocation to a particular client if they or the client have identified/identify to us a conflict of interest or if we identify a clear conflict of interest (for example the adviser's business competes with the client's). If it not clear we will query with the adviser before making a decision.
- f. Note that following production of the action plan other advisers may be drawn from the pool, following the same process, in line with identified client needs (and/or activities may be carried out by other delivery organisations or elements of the project). More than one adviser may work with a client, in series or in parallel, in accordance with client need.
- g. Exceptionally an adviser may be asked to work in a geographic area they have not specified, for example, if particularly high demand or holidays/sickness mean that no appropriate adviser covering that area is available within the appropriate timescale. In such a case we will already



have checked with all advisers who have indicated their willingness to work in that area. In such an instance we will have already approached all advisers specifying that they are happy to work in that area. We will contact those who have not specified that area - starting with the nearest. Where advisers are equi-distant we will contact the higher ranking first.

- h. A client may request a change of adviser, in which case a replacement adviser will be selected using the process set out in d. above. Similarly, an adviser may ask to be moved from working with a particular client and a replacement adviser will then be selected using the process set out in d. above.
- i. In exceptional circumstances we may choose not to use the above methodology, for example in the light of severe weather incident such as Storm Desmond or other crises such as Foot & Mouth. In such instances to expedite speedy and efficient delivery we may choose to ask which advisers are available and then allocate available advisers/groups of advisers to specific geographic areas. Advisers would still be able to bring clients to the project as in (b) above and we may still take account of within lot specialisms and specific experience/expertise where relevant. Section (e) regarding conflict of interest will also continue to apply.

Submission content/tender completion information

Tenders must be written in English.

Where the tenderer is a company the tender must be signed by a duly authorised representative of the company. In the case of a sole trader you should sign and give your name in full together with the name under which you are trading.

The tender must be clear, concise and not qualified in any way. The Chamber reserves the right to mark a tenderer down or exclude them from the procurement if the tender contains any ambiguities or lacks clarity. Tenderers should submit only such information as is necessary to respond effectively to this brief. Tenders will be evaluated on the basis of information submitted by the deadline.

Each tender must operate as a standalone bid and not be dependent on any other bid or factors external to the tender itself (that is the tender must be capable of being accepted in its own right).

Your submission must include the following:

- The name of the company/sole trader bidding
- Address
- Named contact with job title plus email and phone contact details
- VAT and company numbers (if applicable)
- A clear statement of commitment to meet the Chamber's requirements and pricing, payment and performance model



- A clear statement of who would be delivering the advice
- Confirmation that the tender will remain open for a period of 180 days
- Undertaking to notify any change in control or composition or other relevant change that has taken place after its submission of the tender
- Schedule A – Certificate of Non-Collusion
- Schedule B – Form of Tender
- Schedule C – Commercially Sensitive Information
- Schedule D – Undertaking
- Schedule E – PQQ
- And for each individual who would be providing advice
 - A list of past contracts and contact details of two relevant referees, of which one must be a business client unless you have not previously worked as a business adviser
 - Clarification of the Pools and Lots you are interested in delivering (Table A, Schedule F)
 - Clarification of the area(s) you are happy to cover (Table B Schedule F)
 - A response against each of the criteria set out below (ITT criteria) for each lot for which you are bidding.

You must complete the PQQ (Schedule E). This looks primarily at your suitability as a bidder. We will assess your response to this first and if you get through this stage we'll then go on to look at your tender, but not otherwise.

For those proposals which pass the PQQ we will then assess your proposals against the following ITT criteria. Please answer separately for each person who would be delivering advice and for each pool and lot for which they are bidding:

- *Relevant expertise, qualifications and experience* (word limit 500 words)
Please explain in detail your relevant expertise, qualifications and experience for each Pool and Lot you are proposing to deliver, including specific examples. This should cover both advice services and your own hands on experience in the subject areas. Please make clear any within lot specialisms.
- *Proactive approach to client management and ensuring clients progress in a timely manner* (word limit 500 words)
Please set out clearly your approach, experience and track record, with examples/evidence.
- *Good paperwork and organisation, i.e. demonstrable ability and evidence of completing paperwork fully but concisely, correctly and in a timely manner, and proven ability to organise your work to ensure clients progress with their support in a timely manner* (word limit 500 words)
Please set out your approach, experience and track record, with examples/evidence.
- *Awareness, understanding and knowledge of the issues facing businesses in Cumbria and any relevant sector/business type/topic issues* (word limit 500 words)
Please highlight your awareness, understanding and knowledge of the issues, with evidence/examples for each Pool and Lot you are proposing to deliver.



- *Availability – while there is no commitment to particular levels of work overall or in any given period by either party, advisers need to be generally available to work with clients within a reasonable timeframe, with, for example, an initial appointment within 10 working days as standard (word limit 100 words)*

Please confirm your availability to meet this requirement.

Note that if you are not currently available but wish to work for us in future you need to apply now – please specify in your proposal when you expect to be available.

Note also that you are free to accept or reject work when offered.

For all applicants in assessing you against the above criteria we will take into account your written responses as requested above, your CV and references including potentially client feedback. We reserve the right to contact any of your previous customers/clients for feedback. We will use the tender assessment method and award criteria set out in the Award Criteria & Example Scoring provided (Schedule H)

The cut off score in each Lot will be 280, subject to scoring at least 3 out of 5 (i.e. a weighted score of at least 120) for Relevant expertise, qualifications and experience.

Any applicant scoring above the cut off score will be appointed to that lot, provided they have scored at least 3 out of 5 (i.e. a weighted score of at least 120) for *Relevant expertise, qualifications and experience*. Successful applicants will be ranked in each lot based on their scoring in that lot. They will be selected from the Pool on the basis set out in Drawing Advisers from the Pool above.

Instructions for submission

Submissions must be submitted by post or email to Lesley Robinson, Growth Hub Project Manager, Cumbria Chamber of Commerce, 3rd Floor Broadacre House, 16-20 Lowther Street, Carlisle, CA3 8DA, lesleyr@cumbriachamber.co.uk by no later than 12 noon on 20th February 2020.

Any tender received after the deadline will not be opened or considered.

Clarifications

Any clarifications in relation to this invitation to tender should be submitted to lesleyr@cumbriachamber.co.uk.

The Chamber will respond to all reasonable clarifications as soon as possible and replies will be available for all to view via www.cumbriachamber.co.uk. It is your responsibility as a bidder to check the website for questions and responses.

Your questions and the answers to them will be publicly available. It is your responsibility to make sure that you do not include any information in your questions which you consider to be confidential or sensitive.

The deadline for receipt of clarifications is noon on 20th February 2020 and no



clarifications will be considered after this deadline.

The Chamber reserves the right (but will not be obliged) to seek clarification of any aspect of a tender during the evaluation phase where necessary for the purposes of carrying out a fair evaluation. Tenderers are asked to respond to such requests promptly.

Tender timetable

This procurement will follow a clear, structured and transparent process to ensure a fair and level playing field is maintained at all times and that all tenderers are treated equally.

The key dates for this procurement are currently anticipated to be as follows:

Event	Date
Issue PQQ & ITT	28 th January 2020
Deadline for receipt of clarifications	Noon 13 th February 2020
Deadline for receipt of tenders	Noon 20 th February 2020
Evaluation of tenders	w/c 2 nd March 2020
Clarification	w/c 2 nd March 2020 (if needed)
Contract decisions and issue of contracts	w/c 9 th March 2020
Contract start date	9 th March 2020

Any changes to the procurement timetable will be published on www.cumbriachamber.co.uk as soon as practicable.

Contract award

Once we have reached decisions in respect of contract awards we will notify all bidders of that decision. Contract award notification will be sent to each tenderer. We will inform each unsuccessful tenderers of the identity and relative advantages and characteristics of successful tenders as compared with the addressee's tender.

Contract terms

The draft contracts proposed are attached as Schedule G. By submitting a tender, tenderers are agreeing to be bound by the terms of this ITT and the relevant contract(s) without further negotiation or amendment.

Warnings and disclaimers

While the information contained in this ITT is believed to be correct at the time of issue, the Chamber will not accept any liability for its accuracy, adequacy or completeness, nor will any express or implied warranty be given.

Neither the issue of this ITT nor any of the information presented in it should be regarded as a commitment or representation on the part of the Chamber (or any



other person) to enter into a contractual arrangement.

Confidentiality

All tenderers responses will be treated as confidential during the procurement process. Requests for information received following the procurement process will be considered on a case-by-case basis applying the principles of the Data Protection Act 2018 and EU General Data Protection Regulation.

The Chamber may consult with third party providers of information before it is disclosed, but cannot guarantee that this will be done. Tenderers are responsible for ensuring that any confidential or commercially sensitive information has been clearly identified in the template provided at Schedule C. It will be at the Chamber's discretion whether or not information is released. If the tenderer is not prepared to accept this then it should not submit a tender.

Publicity

No publicity regarding the services or award of the contract will be permitted unless and until the Chamber has given express written consent to the relevant communication and ensured it complies with ESIF and Chamber/Growth Hub guidelines as relevant.

Tenderer conduct and conflicts of interest

Any attempt by tenderers or their advisers to influence the process in any way may result in the tenderers being disqualified.

Tenderers are responsible for ensuring that no conflicts of interest exist between the tenderer and its advisers and the Chamber and their advisers. Any tenderer who fails to comply with this requirement may be disqualified from the procurement at the discretion of the Chamber.

The Chamber's rights

The Chamber reserves the right to:

- Waive or change the requirements of this ITT, timetable, structure or content of the procurement process from time to time. Such waivers or changes will be available at www.cumbriachamber.co.uk. Where waivers or changes are made after the tender submission deadline, the Chamber will contact each bidder to inform them of such waiver or change.
- Seek clarification or documentation in respect of a tenderers submission
- Disqualify any tenderer that does not submit a compliant tender in accordance with the instructions in this ITT
- Disqualify any tender that is guilty of serious misrepresentation in relation to its tender or the tender process
- Withdraw this ITT at any time or reinvoke tenders on the same or any alternative basis
- Choose not to award any contract or accept the lowest or any tender as a result of the current procurement process



- Choose not to award a contract to any organisation it views as a competitor

Bid costs

The Chamber will not be liable for any bid costs, expenditure, work or effort incurred by a tenderer in proceeding with or participating in this procurement, including if the procurement process is terminated or amended by the Chamber.

Project Funding

The current BSUS and Growth Hub ERDF projects are supported by the Chamber, Lancaster University, Carlisle City Council, Penrith Industrial BID, Sellafield Limited, South Lakeland District Council and the European Regional Development Fund Programme 2014-2020. The Department for Communities and Local Government is the managing authority for the European Regional Development Fund Programme, which is one of the funds established by the European Commission to help local areas stimulate their economic development by investing in projects which will support local businesses and create jobs. For more information visit www.communities.gov.uk/erdf. It is anticipated that any follow on projects will be similarly funded.

The New Enterprise Allowance initiative is matched with the European Social Fund as part of the 2014-2020 European Structural and Investment Funds Growth Programme in England. The Department for Work and Pensions is the Managing Authority for the England European Social Fund programme. Established by the European Union, the European Social Fund helps local areas stimulate their economic development by investing in projects which will support skills development, employment and job creation, social inclusion and local community regenerations.

For more information visit <https://www.gov.uk/european-growth-funding>.

Funding arrangements vary for other projects.