TENDer specifIcation

Tender Title:

**Provision of Specialist 1-2-1 Finance Application Advice**

ERDF Project:

**Cheshire & Warrington Access to Finance & SME Grant Service**

|  |  |
| --- | --- |
| Issue of Specification | 19th November 2021 |
| **Deadline for Responses** | **3rd Decemeber before 5:00PM** |

January 2016

PArt A: Background to Specification

This document comprises the following sections:

* Part A: Background to Specification which outlines the requirements of the service and provides guidance on completing the tender,
* Part B: Contractor Response Section, seeking supplier information,
* Part C: Response to Tender through Responding to Tender Questions.

Please read carefully the instructions and answer all questions. If you have any queries regarding completing of the response please email procurement1@blueorchdid.co.uk . We reserve the right to distribute the response provided to your question to other interested applicants if required under FOI legislation.

# Background

The Cheshire & Warrington Access to Finance & SME Grant Service (run by Blue Orchid Enterprise Solutions Ltd) delivered by Blue Orchid, Cheshire West & Cheshire Council & Warrington & Co is an ERDF project which provides a range of services to SME across Cheshire & Warrington including.

1. 33% financial grant towards the implementation of a consultancy project which will facilitate growth and employment within the SME.
2. A programme of Access to Finance seminars and workshops
3. 1-2-1 consultancy to small businesses seeking advice and guidance to support an application for financial investment (approx. 2 days) .i.e. Business loan application, British Business Bank/Northern Powerhouse Investment Fund Debt Micro-finance, etc.

Blue Orchid is seeking consultants with expertise in finance & businesses planning to provide the 1-2-1 investment application support to Cheshire SMEs under strand 3 of the programme.

# Requirements of the Brief

The requirements are as follows:

* To provide a minimum of 12 hours of 1-2-1 support to each allocated SME client over a number of engagements in order to develop a professional business case for a financial investment/loan/equity application.
* Experience and knowledge of working with existing young businesses / SMEs.
* Experience of being self-employed / running your own business / enterprise at a senior level.
* No volumes are specified but we would expect Advisors to be available on a call down basis across Cheshire & Warrington.
* The ability to communicate and develop solutions with senior personnel from a range of backgrounds and sectors, delivering a first-class customer experience
* The ability to provide accurate quantitative & qualitative information, as well as compliant contract specific paperwork / evidence of support

Advisors are expected to provide their own transport and technology (laptops, phones etc.) and be able to deliver across all of Cheshire and Warrington. This is a competitive tender and not an offer of employment.

# Preparing a Successful Application

Successful applicants will demonstrate:

* A track record of successful provision of business support to SMEs focused on business planning, growth planning, financial advice and planning, etc;
* Ability to communicate and develop solutions with senior personnel and with people from a range of backgrounds and sectors;
* Ability to provide regular, timely statistical and qualitative information in a format to be agreed as well as compliant contract specific paperwork / evidence of support;
* Ability to work flexibly as part of a team to provide a seamless service;
* Offer good customer service skills.

# Responding to the Tender

The scoring of the tender is based on the following criteria:

1. Curriculum vitae/Company Background Information Only
2. Meeting the requirements of the brief 25%
3. Background / experience in the role 25%
4. Price 40%
5. Interview 10%

# Minimum Score Threshold for Interview/award

Before a Supplier/Applicant is invited for interview, they first need to pass the minimum score threshold across Questions 1 (Meeting Requirements of Brief) and Questions 2 (Background/Experience). **A minimum combined score of 40 marks out of a total of 50 is required from Questions 1 and 2.** Failure to meet the minimum quality threshold will mean the supplier’s response will not be further analysed and not invited to become a supplier.

# Selected Advisors for award

It is likely that a number of Advisors/Presenters will be appointed following this tender, all of whom have met the minimum quality threshold and are within the budgeted day rate. Work will be provided based on Specialist Advisor’s delivery specialisms and requirement for the service. There is no guarantee of work.

# Timescales

The table below outlines the timescales for this tender and delivery of the project.

|  |  |
| --- | --- |
| Issue of Specification | 19th November 2021 |
| Deadline for Responses | 3rd December before 5:00PM |
| Interview (if required for clarification) | 6 – 8 December 2021 |
| Evaluation and Feedback | 8th December 2021 |
| Consideration of Award | 8th February 2016 |

# Pricing

**LOT 1: Specialist Advisors**

**There is an indicative maximum budget of £1,000 (exc. VAT) per 12-hours support provided.** To secure the full 12 hours of support will mean that a number of separate engagements with the SME client will be necessary over a period of time. Support will be given primarily on a one-to-one basis, and on occasion following instruction from Blue Orchid on a one-to-many basis. Evidence of support received must be provided in a format compliant with ERDF and Blue Orchid systems and procedures e.g. client signed attendance sheets logging hours of support and details of support provided.

Please quote price in the following formats;

1. per claimable client output (12 hours assistance) inclusive of expenses but excluding VAT
2. Day Rate for business advice & consultancy

TECHNICAL NOTEs

# No Contract

No information contained in this specification or in any communication made between Blue Orchid and any supplier in connection with this specification shall be relied upon as constituting a contract, agreement or representation that any contract shall be offered in accordance with this specification. Blue Orchid reserves the right, subject to the appropriate procurement regulations, to change without notice the basis of, or the procedures for, the competitive tendering process or to terminate the process at any time. Under no circumstances shall Blue Orchid incur any liability in respect of this specification or any supporting documentation. You accept Blue Orchid’s Terms and Conditions of Business and Requirements of ERDF Funding.

# freeedom of information

We are committed to open government and to meeting their responsibilities under the Freedom of Information Act 2000. Accordingly, all information submitted to Blue Orchid may need to be disclosed in response to a request under the Act. If you consider that any of the information included in your tender is commercially sensitive, please identify it and explain **(in broad terms)** what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. You should be aware that, even where you have indicated that information is commercially sensitive, we may still be required to disclose it under the Act if a request is received. Please also note that the receipt of any material marked ‘confidential’ or equivalent by Blue Orchid should not be taken to mean that we accept any duty of confidence by virtue of that marking. If a request is received, we may also be required to disclose details of unsuccessful tenders.

# Instructions for Completion

**Completed questionnaires should be submitted in electronic format and emailed to the email address given at the end of this section and by the due date as outlined in Deadline for Response in the Timescales section.**

You should answer all questions as accurately and concisely as possible. Where a question is not relevant to your organisation, please state N/A (not applicable) and include a brief explanation if required.

Questions must be answered in English and submitted either in Microsoft Word readable format or Adobe Acrobat PDF.

Responses will be evaluated in accordance with the procedures set out in Part A. In the event that none of the responses are deemed satisfactory, Blue Orchid reserves the right to consider alternative procurement options.

Failure to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean that you will be excluded from further participation in the procurement.

## Consortia and sub-contracting

Where a consortium or sub-contracting approach is proposed, all information requested should be given in respect of the proposed prime contractor or consortium leader. Relevant information should also be provided in respect of consortium members or sub-contractors who will play a significant part in the delivery of services or products under any ensuing contract. Responses must enable Blue Orchid to assess the overall service proposed. Where the proposed prime contractor is a special purpose vehicle or holding company, information should be provided of the extent to which it will call upon the resources and expertise of its members.

We recognise that arrangements in relation to consortia and sub-contracting may be subject to future change. Service providers/suppliers should therefore respond in the light of such arrangements as are currently envisaged.

Please provide details of the proportion of any contract awarded under this contract that the prospective supplier proposes to subcontract.

We reserve the right to seek independent financial and market advice to validate information declared or to assist in the evaluation.

## Queries about the procurement

We will not enter into detailed discussion of the requirements at this stage.

Any questions about the procurement should be submitted by e-mail to **procurement1@blueorchdid.co.uk**

If we consider any question or request for clarification to be of such significance that all potential suppliers who have responded should be made aware of it, both the query and the response will be communicated to them, in a suitably anonymous form.

All responses received and any communication from service providers will be treated in confidence.

# Supplier Selection

Selection criteria at a general level will be a combination of both financial and non-financial factors and will consider:

1. Supplier Acceptability – status of supplier in relation to selection criteria below
2. Supplier Track Record (service history) - The Service Provider must be able to demonstrate a successful track record (service history) of providing similar services to those listed in the Official Journal of the European Union (OJEU) Call for Competition Notice.
3. Supplier Capacity and Capability – Assessment of the totality of resources and core competences available to the supplier(s).

Failure to provide a satisfactory response to any of the questions may result in us not proceeding further with the supplier. The information supplied will be checked for completeness and compliance before responses are evaluated.

Evaluation of subsequent stages will be undertaken in accordance with the overall Evaluation Strategy for the project. The high level Evaluation Criteria for the project are as follows:

* Specification compliance/ acceptable alternative
* Technical criteria
* Service Provision

We will evaluate all proposals on the basis of the “most economically advantageous proposal”.

The overall evaluation process will be conducted in a fair and equitable manner, so that we are able to consider the value for money of each proposal. This means that different clarification/information may be sought from different applicants.

PART B: REsponse Section

# 1 ORGANISATION IDENTITY

All respondents should answer these questions. If your company is not currently registered in the UK, you should still try to answer each question, substituting any appropriate professional, commercial or other registration within your domestic jurisdiction.

Single sole trader business advisors are most welcome to apply and where an answer is not applicable please indicate as such.

**Information Only**

|  |  |
| --- | --- |
| Name of the company (Prime or single contractor) in whose name the tender would be submitted |  |
| Contact name |  |
| Address |  |
| Telephone number |  |
| E-mail address: |  |
| Web Address |  |
| Company Registration number: (if any) |  |
| Date of Registration |  |
| Registered address if different from the above |  |
| VAT Registration number: (if any) |  |
| Please attach Curriculum Vitae or Organisational Background for information only | **Attach CV Yes No** |

# 2. ORGANISATION INFORMATION

All firms should answer these questions. If your company is not currently registered in the UK, you should still try to answer each question, substituting any appropriate professional, commercial or other registration within your domestic jurisdiction.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Is your organisation a: | i) public limited company? |  | iii) sole trader? |  |
|  | ii) limited company? |  | iv) partnership? |  |
|  | v) voluntary organisation |  | vi) charity |  |
| Brief history (not more than 200 words) of your organisation or career background |
|  |
| If you or your organisation is a member of any professional or trade bodies or associations, please list them below: |
|  |

# 3. DELIVERY SPECIALISM

PART C: Scored Response

**Scored**

|  |
| --- |
| **Question 1. Background and experience in the role.** Please outline previous knowledge or experience of delivering this type of service before, use case studies if available. (Max 1,000 words).  *This is a minimum threshold question – please see notes above* **SCORE 30%** |
| Meeting the Requirements of the Brief. Please provide details of how you would provide Specialist Advice to Growth Hub Orchid clients and detail the areas of expertise you could offer. (Max 1,000 words). This is a minimum threshold question – please see notes above.  |
| **Question 2. Meeting the Requirements of the Brief.** Using a previous example of your work as a case study please outline how you have previously provided advice, guidance and support to an SME to assist them in identifying potential finance source, preparing a robust investment case/business plan and applying for finance**. (Max 1,000 words).  *This is a minimum threshold question – please see notes above*** **SCORE 30%** |
|  |
| **Question 3. Pricing****SCORE: 40%** |
| **Please note the maximum budget available is £1,000 per claimable client i.e. minimum 12 hours assist.** **Any response above this figure will be rejected as non-compliant.** |
| **Total client price per 12-hour assist £****(Inclusive of expenses, excluding VAT)** | **Day Rate £****(Inclusive of expenses, excluding VAT)** | **Number of days available per month to deliver the service** |
|  |  | Minimum | Maximum |
| days | days |

# COMPLIANCE WITH EC LEGISLATION/ UK PROCUREMENT LEGISLATION

**Pass/Fail**

|  |  |
| --- | --- |
| Do any of the circumstances as set out in the summary below of ineligibility conditions apply?  |  |
| If yes, please supply details: |  |
| We may seek evidence at a later date, in confirmation of your answer.  |

## SUMMARY OF INELIGIBILITY CONDITIONS

1. 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;
2. 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;
3. 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;
4. has been guilty of grave professional misconduct proven by any means which the contracting authorities can demonstrate;
5. 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;
6. 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;
7. is guilty of serious misrepresentation in supplying the information required under this Section or has not supplied such information;
8. 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;
9. 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;
10. 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;
11. has been the subject of a conviction for money laundering, as defined in Article 1 of Council Directive 91/308/EEC of 10.61991 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 procurement1@blueorchdid.co.uk before the deadline specified in Timescales.

Appendix 1 – Evaluation Criteria

We intend to award the contract to the Tenderer offering the most economically advantageous Tender in accordance with the Award Criteria and weightings set out in the paragraphs below.

Prior to evaluating Tenders, we will carry out an initial review of each Tender to confirm completeness and compliance with the Tender Requirements and may, at its discretion, reject a Tender which is incomplete and / or non-compliant. The following pre-evaluation process will be undertaken:

* **Compliance Check Stage:** to confirm completeness and compliance with the Tender Requirements. We may, at our discretion, reject a Tender which is incomplete or non-compliant. Please note the word count and any text above the word count will not be assessed.
* **Selection Stage:** to confirm compliance with any minimum standards / thresholds set out in the Contract. **Please note there is a minimum quality threshold for the combined value of Questions 1 and 2, of 40 marks out of 60. Tenderers who do not meet this threshold will not be assessed any further and will be declined as suppliers.**
* **Tender Price Score:** This is calculated using the formula shown below for those applicants meeting the minimum quality threshold and technical compliance requirement. Note maximum day rate.
* **Interview:** interviews will only be used to address any clarifications and are not scored.
* **Evaluation Stage:** We will then determine the most economically advantageous tender by evaluating all those Tenders that have successfully passed through the above stages in accordance with the award criteria and weightings set out in the paragraphs below.

Any Tender that is accepted will be awarded to the most economically advantageous tenderer in accordance with the following criteria. **Please note there is a minimum quality threshold for the combined value of Questions 1 and 2, of 40 marks out of 50.**

**Part B: Contractor Information as follows:**

|  |  |
| --- | --- |
| **Part B Contractor Information** | **Assessment** |
| Organisational Background and Specialism | Information |

**Part C – Scored Response and Compliance**

|  |  |
| --- | --- |
| **Part C Award Criteria** | **Max Potential Score** |
| Question 1 – Response to the Tender | 30 |
| Question 2 – Meeting the Requirements of the Brief | 30 |
| Question 3 – Price | 40 |
| Interview | n/a |
| Compliance With EC Legislation/ UK Procurement Legislation | Pass / Fail |

### QUALITATIVE – questions 1 and 2 plus interview

Each non-price criterion question (and interview questions) will be scored (referencing the above weighting) using the following methodology:

|  |  |
| --- | --- |
| Full Points | Proposal exceeds requirement. Demonstrated by clear, detailed information and unequivocal evidence |
| 75% of Points | Proposal completely meets requirement. Demonstrated ability to meet requirements with clear and convincing evidence |
| Half Points | Mostly meets requirement. Evidence is fairly clear and convincing; minor reservations in one or more key areas |
| 25% of Points | Mostly fails to meet requirements. Evidence is unclear and/or unconvincing in most areas, although convincing in some areas. Overall response casts doubt on ability to meet requirements |
| 0 Points | Significantly fails to meet requirements. In virtually all areas there is a lack of convincing evidence which casts serious doubt about the ability to meet requirements |

### PRICE – question 3

The lowest price will be awarded full marks and each other proposal will be awarded a score based on the percentage difference from the lowest price. See worked example below.

|  |  |
| --- | --- |
| **Scoring Model on Pricing** |   |
| **Lowest Price** | **£500** |
| **Bidder Price** | **£700** |
| **Difference** | **£200** |
| %age Score | 40% |
| Max Score | 40 |
| **Bidder Score** | **24** |

If the price seems abnormally low, further explanation as to the low price may be sought and evaluation of whether the quote is considered economically viable.

**END OF TENDER DOCUMENT**