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Date:**29-09-2022**

# **RFQ Part 1- Instructions and Specification**

Quotation: **ERDF BUSINESS SUPPORT PROJECT REVIEW**

Quotation Reference: **DN635268**

Quotation return deadline: **12 noon, 14th October 2022**

You are invited to submit a quotation for the above contract and the following documents are available on the YORtender system to enable you to submit your quotation electronically.

* **RFQ Part 1 – Instructions and Specification (this document, for reference)**
* RFQ Part 2 - Terms and Conditions (for reference)
* RFQ Part 3 - Quote Document (to be returned)

Please note hard copy submissions will not be accepted. Quotations shall remain open for acceptance for a minimum of (30) days and the Authority expects to notify the award of the contract within (7)days from the deadline for submission of quotations.

Any queries must be raised via [www.procontract.com](http://www.procontract.com) at least four working days prior to the deadline for submission of quotations.

The Authority reserves the right to accept or reject any part of any quotation.

1. **Introduction and General Instructions**
   1. This request for quotations is published by the Sheffield City Region Mayoral Combined Authority (the Authority). Further information about the Authority can be found on our website at [www.southyorkshire-ca.gov.uk](http://www.southyorkshire-ca.gov.uk)
   2. If you have been personally invited to submit a quotation and you have decided to decline the invitation please notify the procurement team via [www.proactis.com](http://www.proactis.com)
   3. If you have any queries or would like to request further information, please use the messaging facility on [www.proactis.com](http://www.proactis.com) to submit your request.
   4. The contract will be based on the Authority’s standard terms and conditions, if you have any queries regarding the terms and conditions these must be raised prior to submitting your quotation. Post tender negotiations will not be permitted.
   5. Responses to queries will be provided via [www.proactis.com](http://www.proactis.com) and made available to all tenderers, except answers which are commercially confidential. If you do not want the answer to your question to be copied to all tenderers, you must clearly mark your question ‘in confidence’ and provide reasons for the request for non-disclosure. We will decide, at our discretion, whether the question is confidential. If we do not consider the question to be confidential, we will offer you the option of withdrawing the question.
2. **Contract Details** 
   1. The highest value of the contract, including any extension period(s) is **£15,000.00**
   2. The Authority anticipates that the contract will start on **31-10-2023** and will end on **31-02-2023**
3. **Submission Guidance** 
   1. You must submit the RFQ Part 3 document(s) via [www.proactis.com](http://www.proactis.com) by or before the submission deadline stated above.
   2. Hard copy submissions will not be accepted
   3. Late submissions will not be accepted.
   4. Only documentation specifically requested should be submitted. Any additional documentation received from tenderers will not be considered by the evaluation panel.
   5. You must not make unauthorised alterations or additions to any of the Authority’s documents.
   6. The submission must be completed in English.
   7. All prices, costs or rates must be quoted in British currency to 2 decimal places (i.e. whole pence).
   8. All prices quoted should be inclusive of travel and subsistence and exclusive of VAT.
4. **Procurement timetable**

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| --- | --- |
| The intended timetable for this procurement is: | |
| **Stage in Procurement Process** | **Date** |
| Suppliers invited to quote | **29-09-2022** |
| Deadline for clarification questions | **07-10-2022** |
| Deadline for submission of quote | **14-10-2022** |
| Assessment and evaluation of quotations to be completed by | **21-10-2022** |
| Award decision | **21-10-2022** |
| Anticipated contract start date | **24-10-2022** |
| Anticipated contract end date | **31-01-2022** |
| **Please note:** the Authority reserves the right to cancel the quotation process at any point and is not liable for any costs incurred. | |

1. **Evaluation Process**
   1. The evaluation process to be applied to this quotation exercise shall be a combination quality and price. Quotations will be assessed on the basis of the most economically advantageous quotation with a quality / price split of 30% price / 70% quality.
   2. The evaluation process will include the following stages.
2. **Stage 1: Evaluation of Selection Criteria.** 
   1. The selection criteria shall be evaluated on a pass / fail basis.
   2. Any quotation that fails to pass all of the requirements of the selection criteria will be eliminated from the procurement process and not evaluated further.
3. **Stage 2: Evaluation of Quality Criteria.** 
   1. The maximum percentage available for quality are 70%
   2. An overall quality threshold of 50% has been set, any quotation that fails to meet the threshold shall be eliminated from the procurement process.
   3. In addition to the overall quality threshold stated above, individual quality thresholds have also been set on the individual questions as set out in the table below.
   4. Your Method Statement is also the formal offer to the SYMCA and will form part of any contract between us. Therefore, please respond in Word format and do not convert the RFQ to PDF.
   5. If more than one organisation will be involved in the delivery of the contract (for example, through a sub-contract arrangement), full details should be provided of how the arrangements will operate to meet the Council’s requirements.
   6. If a word count limit is included, ensure this is not breached. Out of fairness to all Bidders, we will only evaluate responses up to the point the word limit has been reached. You may wish to include the total number of words to each response as your own check as you go along.
   7. The quality criteria are weighted as illustrated in the table below

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| --- | --- | --- |
| **No** | **Quality criteria** | **Maximum percentage available** |
| 1 | Delivering the Review / Assessment of the EDRF projects | 40% |
| 2 | Relevant experience | 10% |
| 3 | Project management | 20 |
| 4 |  |  |

* 1. Any quotation that fails to meet the individual quality thresholds shall be eliminated from the procurement process and not evaluated further.
  2. Scores for quality will be allocated by the evaluation team using the model illustrated below.

|  |  |  |
| --- | --- | --- |
| **Score** | **Score Standards** | **Assessment** |
| 5 | Excellent | Exceptional demonstration of the relevant ability, understanding, experience, skills and resource and/or quality measures required to meet the requirements of the contract. Full evidence provided where required supporting the response. |
| 4 | Good | A good demonstration of the relevant ability, understanding, experience, skills, and resource and/or quality measures required to meet the requirements of the contract. A small number of omissions of minor importance are contained within the evidence that has been provided to support the response. |
| 3 | Acceptable | An adequate demonstration of the relevant ability, understanding, experience, skills, resource, and / or quality measures required to meet the requirements of the contract. The evidence that has been provided to support the response is lacking in detail and contains a number of omissions of minor importance. |
| 2 | Poor | Some minor reservations of the relevant ability, understanding, experience, skills, resource, and / or quality measures required to meet the requirements of the contract. The evidence that has been provided to support the response is lacking detail in at least one key area. |
| 1 | Very Poor | Considerable reservations of the relevant ability, understanding, experience, skills, resource, and/or quality measures required to meet the requirements of the contract. The information that has been provided to support the response is lacking evidence in one or more key areas. |
| 0 | Unacceptable | An explanation is not provided and/or does not relate to the question asked. |

1. **Stage 3: Evaluation of Price** 
   1. The maximum percentage available for price are 30%
   2. The budget available for this contract is between £10,000 – 15,000. Please provide as much budget detail as possible and be aware that value for money forms a part of the scoring process. A payment schedule will be agreed with the successful bidder, but it is expected that the majority will be paid on completion of this work.
   3. Any proposals received which are over budget will automatically fail to get through the initial gateway review process with no further evaluation of the Method Statement responses.
   4. The following points should also be factored in when pricing:
   5. All prices should exclude VAT and be in £ sterling (GBP)
   6. Prices shall remain fixed for the duration of the contract.
   7. Your price submission must be a fully costed proposal inclusive of all disbursements and any other costs or expenses necessary for the proper provision of the Goods / Services. There will be no opportunity to negotiate any missed costs subsequently. Please stipulate a clear and final total contract price payable – this allows us to understand and compare your price.
   8. Detail your fee structure in a clear and transparent manner which covers all your fees and on-costs to deliver the requirements as laid out in the specification (and any Method Statement responses) and allows us to fully understand the final fee payable by the Council for this requirement
   9. The quote with the lowest total price will achieve the highest score available. All other quotes will receive a reduced score in proportion to how much more expensive that quote is. An example is provided below:
      1. If a maximum of 50 points is available for price and the lowest quote is £100k, that submission receives the full 50 points. If another quote is £110k (10% more expensive), 10% (five points) will be deducted from the maximum points available. If another quote is £200k (100% more expensive), 100% will be deducted from the maximum points available as illustrated below.

|  |  |
| --- | --- |
| Tendered Price | Price Points Awarded |
| Quote 1 - £100,000 | 50 points |
| Quote 2 - £110,000 | 45 points |
| Quote 3 - £200,000 | 0 points |

* 1. Tenderers should be aware that in evaluating costs, the Authority will consider the credibility of the price submitted for the goods, works or services being procured. If officers believe the cost is abnormally low (e.g. unrealistically low prices for goods/works or resource commitments etc), the Authority will seek clarification from the Tenderer to understand further the basis of the price submitted. If the response is not satisfactory the quote may be eliminated from the procurement process and not evaluated further. Tenderers should note that prices cannot be altered after final quotes have been submitted.

1. **Specification**
   1. **Introduction**

South Yorkshire has benefitted from significant European Regional Development Fund (ERDF) from the 2014-20 Programme and this has supported a number of projects including a range of Business Support programmes and projects. As the region moves from access to ERDF to the new UK Shared Prosperity Fund (SPF) an independent review of current local authority managed and partner-managed Business Support activity is considered appropriate to determine future needs.

This ITT seeks a ‘light touch’ interim review and assessment of the delivered projects with the outcome expected to address the following:

* A high-level summary of the impacts achieved by the activity to date.
* Analysis of the different models of delivery and their complementarity
* Views of partners and beneficiaries to the effectiveness of the programmes.
* In the context of a Cost-of-Living crisis, a likely recession and a need to significantly improve the performance of the South Yorkshire economy consideration of the following:

1. What should the nature and mix of Business Support programmes in South Yorkshire look like from April 2023 – taking a lead from work already undertaken by SYMCA?
2. Consideration as to any duplication/overlap of activity, either in theme, focus or delivery geography.
3. In the context of 1), what effective role could of existing ERDF Business Support projects have from April 2023 and:
4. Should any of the activity continue ‘as is’?
5. Should any of the activity be brought to a conclusion by June 2023?
6. Should any of the activity continue but be adapted to meet current and future needs?
7. Should some elements of the activity be brought together to create simplification and cost-effectiveness going forward?
8. In respect to 3) recommendations and identification of delivery efficiencies that could be achieved.
   1. **Vision and Benefits**

Appendix 1 provides a list of ERDF funding Business Support projects that are currently delivering activity within South Yorkshire. The activity varies from direct 1 2 1 support from experienced Business Advisors to grant programmes where businesses can access direct financial support subject to the provision of match funding.

The ERDF programme comes to an end in December 2023; however, the majority of projects listed in Appendix will cease activity between April and June 2023 to enable a timely ERDF closure process. Without additional external funding support, it is not expected that any of the projects would continue with LA funding alone. This potentially leaves a significant gap in the South Yorkshire Business Support offer.

The majority of ERDF projects operate across South Yorkshire on a ‘hub’ and ‘spoke’ type model where one Local Authority acts as an Accountable Body for the project on behalf of the other LA’s. Thereafter the activity is either delivered like-for-like in each LA area or the individual LA has the ability to establish a Service that is slightly more bespoke to their business community needs.

The approach outlined above has been put into practice for over 20 years and sits alongside other business support activity either delivered through the other public sector support include SYMCA (the Growth Hub) and the private sector. More recently SYMCA has provided additional resource through their Recovery Action Plan (RAP). A consequence of the approach is that a number of teams have been built up to deliver and/or administer complex ERDF funded projects. Without replacement funding some of this experience might be lost to the region and its businesses.

Each ERDF project is subject to bespoke and detailed evaluation prior to its financial competition. This review, subject to this tender, is not to replicate these evaluations but rather undertake a ‘light touch’ review to inform partners whether UKSPF would be an option for the continuation of the type of activity, where the existing ERDF projects could represent a route to deliver such activity, and what kind of model is likely to be most effective for delivery

The South Yorkshire Shared Prosperity Investment Plan was submitted to Government on 1st August (Appendix 2) and has a specific allocation of £14.9m aimed at Business Support activity. The SYMCA is the Accountable Body for the SYSPF activity and will need to source Business Support activity to deliver the objectives of the Investment Plan. Funding is likely to be made available either by direct Commissioning and/or a series of competitive Calls or Proposals. It is hoped that this process will start before the end of October 2022. Notably the level of funding is less than previous ERDF allocations and as such the output of this Review / Assessment is likely to influence the UKSPF process.

**Description of Goods / Service to be provided**

South Yorkshire Mayoral Combined Authority, together with its South Yorkshire local authorities and universities, seeks to commission a ‘light touch’ assessment of the ERDF funded Business Support projects to help inform future activity funded through the SYSPF.

The outputs of this work should be a report due by the end of October 2022 and should include the following:

1. A review of the Business Support activity required in South Yorkshire (based on work undertaken by SYMCA).
2. A short description of the ERDF projects included in the assessment and a summary of performance to date in respect to outputs and outcomes together with costs to date. This information shall be provided by each Accountable Body for the project and represents more of a ‘desk top analysis’.
3. A limited number of focused interviews with relevant individuals, businesses and organisations that have been involved with the project either as a delivery partner or beneficiary. To be facilitated by SYMCA and the ERDF Accountable Bodies.
4. A brief assessment of the value of the project to date in terms of achieving its aims, its direct and indirect impact and whether the activity represents overall added value.
5. An assessment of any strengths or weaknesses identified through the research.
6. As assessment of value for money based on costs and benefits to date.

In the context of the replacement of ERDF with the SYSPF and its Investment Plan and using the quantitative and qualitative data collected from the Stage 1 the bidder shall provide an opinion as to the following and the associated implications:

1. What should the nature and mix of Business Support programmes in South Yorkshire look like from April 2023 – taking a lead from work already undertaken by SYMCA?
2. Consideration as to any duplication/overlap of activity.
3. In the context of 1), what effective role could of existing ERDF Business Support projects have from April 2023 and:
4. Should any of the activity continue ‘as is’?
5. Should any of the activity be terminated by June 2023?
6. Should any of the activity continue be but adapted to meet current and future needs?
7. Should some elements of the activity be brought together to create simplification and cost-effectiveness going forward?

In respect to 3) recommendations and identification of delivery efficiencies that could be achieved.

Bidders should note that the SY LA partners will work with the successful bidder on developing and facilitating their review and assessment.

At a minimum we would expect the work to entail discussions with the Lead parties for each ERDF project and a limited number of interviews participants and businesses that have directly benefited from the project activity. Where appropriate the SY LAs will facilitate workshops with other partner organisations.

We expect the respondents to this tender to design the methodology to answer the above questions and it is expected that bidders will suggest other areas of enquiry where it is felt there are gaps in this specification.

* 1. **Performance Measures /Contract monitoring** 
     1. The contract will be managed by SYMCA, who will be responsible for overseeing the work of the supplier and managing performance. The successful bidder will be expected to attend a limited number of contract meetings in order to report progress, issues and request decisions/steer. The frequency of these is to be agreed at the inception meeting.
     2. We have an established Steering Group for the ERDF Business Support Review comprised of Council officers from the South Yorkshire LAs as well as private sector representatives who will take oversight of this piece of work, provide guidance and steer, and approve the final document.
  2. **Payments and Invoices**
     1. Payments will be made following completion of required work and presentation of a valid invoice which will be required to be sent to [payments@southyorkshire-ca.gov.uk](mailto:payments@southyorkshire-ca.gov.uk) . Please ensure invoices are sent with your P/O customer number which you will be provided with.