

**Partnership Opportunity: Provision of Financial Capability Support for Building Better Opportunities Projects in Lancashire**

**Reference: DN349419**

**INVITATION and INSTRUCTIONS**

**TO TENDER**

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# BACKGROUND

Selnet Ltd is the Social Enterprise Network for Lancashire and for over 10 years Selnet has supported social enterprises across Lancashire. In 2015/16 the organisation led a 12-month process to develop three Lancashire-wide partnerships to provide specialist employability and skills support to disadvantaged people. Our partnerships consist of over 50 diverse delivery partners predominantly from the voluntary, community, and social enterprise sectors, coming together to deliver specialist support for key groups across Lancashire. Selnet is the lead partner and does not undertake any delivery or direct support to participants.

Building Better Opportunities (BBO) is a national programme funded by The Big Lottery Fund (BLF) and the European Social Fund (ESF) 2014-2020 to invest in local projects tackling the root causes of poverty, promoting social inclusion and driving local jobs and growth. Over three years, 3270 disadvantaged people will benefit from support tailored to their individual needs and interests to overcome complex barriers and move towards work and training.

The projects integrate targeted services to deliver a holistic, personalised offer of support for the identified needs of individuals accepted onto the projects. BBO project delivery staff work to enable participants to overcome obstacles to sustainable employment arising out of their situations, circumstances and behaviours: helping to build resilience, self-esteem and self-confidence in working towards successful employment and training outcomes. Each project offers an abundance of practical support including; money and budgeting advice, IT skills, business start-up, CV building, interview practice, confidence building activities, volunteering experience, basic skills, housing advice, support with childcare, and much more.

## Age of Opportunity will support 1500 people aged 50 and over. This project aims to engage with older people who live in the Lancashire LEP area and have low or no skills, thereby preventing them from engaging with training and employment opportunities. It will support them in moving towards and into employment. This project should be focused on the barriers to training, work and employment, taking an integrated approach to addressing these barriers.

## Invest in Youth will support 770 people aged 15 to 24. This project aims to reduce the number of NEETs in the Lancashire LEP area, specifically focusing on identifying and reaching the hardest to reach young people who are furthest away from the labour market and training. It aims to provide integrated support to young people who are not already engaged in statutory provision and work. It should tackle the barriers young people face and help individuals to find routes into employment, volunteering or further learning activities. The aim of the project is for longer term reengagement rather than short term outputs.

## Changing Futures will support 1000 people of all ages (15+). This project aims to offer support to individuals who are at risk of exclusion from the labour market. It will support disadvantaged people to move towards and into employment. This project should particularly target BAME groups, women, and those with physical and/or mental health problems, supporting them to tackle the barriers they face and identify routes to work.

The three BBO projects are now in delivery. Age of Opportunity and Invest in Youth have been operational since 1st August 2016 and Changing Futures since 1st February 2017. BBO is contracted until 31st December 2019.

## Project Participants:

## All participants must meet funder eligibility criteria for the respective project. Participants must be unemployed or economically inactive as defined in the programme guidance. BBO projects are specifically for people who are most at risk of social exclusion and specific demographics are also applied to participant throughflow such as gender and ethnicity.

## Participant eligibility is tested in terms of the mandate from the funders and a further diagnostic tool is used to assess the participant’s level of disadvantage. Once the participant is accepted on to the project an ‘Output’ is counted and support begins. There is no predetermined package of support or set timeframe in which a participant is on project – all support is tailored to the needs of the individual. The projects are designed to support participants with multiple and complex needs and the delivery partners strive to help participants overcome all an individual’s barriers to economic activity.

## Project Targets:

## Outputs, Results and Soft Outcomes are at Schedules 1(a), 1(b) and 1(c).

# BRIEF

Applications are invited from suitably qualified and experienced organisation/s to provide specialist support to improve a participant’s financial capabilities from each of the three projects. Projects; Age of Opportunity, Invest in Youth and Changing Futures work across the whole of Lancashire. Our projects have been in operation for approximately 18 months and during this time it has become evident that a significant proportion of BBO participants are experiencing exclusion from the labour market due to financial limitations. These relate to the participants personal financial situation or financial capabilities, and as such these circumstances act as a barrier to progression for the individual.

Proposals are sought from organisation/s that can support this important function helping participants remove barriers which present a major obstacle to them. Financial barriers often relate to the balance between benefits and employment income, poor financial management and debt, and in many cases need access to affordable care provision for dependants.

The successful bidder will provide participants with skills, knowledge and ability to manage or understand their financial situation better and in some cases help them to make the transition into work and then budget accordingly.

Services offered within this financial capability support might be; Debt/financial hardship advice, support in budgeting and reducing household bills, help with Welfare Benefits, affordable credit information, Form-filling, Housing Advice and accessing a bank account. Additionally, a key component of this support would be signposting and help to access external services such as Healthcare, Gambling and other addiction, Crisis Support and Advocacy. BBO projects are always led by participant need meaning this is not an exhaustive list.

Prospective partners should outline the format of their proposed offer in their tender submission, demonstrating why they deem this to be an effective approach to improving financial capabilities amongst the target group. This could be in the form of short courses, activities to help people manage their finances 1-1 support support, or a combination of these or other approaches. Participants would access this specialist support via a referral from one of the current delivery partners within the relevant BBO project either at the start of their journey if financial circumstances are a limiting factor to full participation, or alongside other support activities whilst they are on project.

Ideally the successful partner(s) will be able to deliver services across Lancashire, but proposals from organisations delivering in just one or two of the three listed areas will be accepted. In these circumstances the full budget would be distributed across a number of successful tenderers.

Please note that all Building Better Opportunity activity must represent additional activity to any delivery paid for by any other means.

**Funding available:**

A total of £156,000.00 is available for the delivery of Financial Capability support to BBO participants across Lancashire. This must provide support for at least 260 participants, with value for money a consideration in assessment of proposals. An indicative breakdown of funding and participants across Lancashire is outlined in the table below.

Where there is more than one high scoring tender for an area, The Authority reserves the right to distribute the total funding between multiple organisations in order to obtain the best possible offer for project participants.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Area 1**Blackburn with Darwen, Burnley, Pendle, Hyndburn, Rossendale, Ribble Valley | **Area 2** Chorley, South Ribble, Preston, West Lancashire | **Area 3** Blackpool, Fylde, Wyre, Lancaster and Morecambe | **Total**  |
| **Participants** | 118 | 79 | 63 | **260** |
| **Indicative funding distribution** | £70,800 | £47,400 | £37,800 | **£156,000** |
| **Age of Opportunity Project** (for funder info only £39,600) | 30 | 20 | 16 | **66** |
| **Invest in Youth Project** (for funder info only £39,000) | 29 | 20 | 16 | **65** |
| **Changing Futures Project** (for funder info only £77,400) | 59 | 39 | 31 | **129** |

**Participant Introductions:**

Though the referral of participants to this service will come from within the partnership itself, we do expect that the successful organisation(s) will, through their general operations, be engaging with individuals who would benefit from and be eligible for support from one of our BBO projects. To this end, we have set a target of at least 81 new introductions to BBO for the successful organisation(s). The 81 introductions of eligible potential participants is divided equally between the three projects.

# PARTNER REQUIREMENTS AND FURTHER INFORMATION

**We are looking for organisations:**

* With experience and track record in supporting people who are financially excluded
* Committed to collaborative, partnership-focused working
* Committed to changing the lives of disadvantaged people
* Ready to commence delivery no later than September 2018
* Who can add value to BBO projects and support other partners to recruit suitable participants
* With capacity and capability to manage the strict requirements of our funders European Social Fund and Big Lottery Fund.

**Existing Partners**

Existing BBO partners are welcome to apply in the interests of diversifying or increasing their role in the programme, but they will not be at an advantage, with all tenders reviewed objectively and awards made on merit.

**Due Diligence**

Successful organisations will be subject to a full due diligence process to assess financial management capacity, financial stability, staffing capacity, and relevant policies and procedures. Successful partners will be supported where possible to meet minimum requirements.

**Delivery Dates**

Delivery will need to start no later than September 2018 and will end around October 2019. The dates provided in the table below are indicative only and may be subject to change. They are provided for your guidance.

|  |  |
| --- | --- |
| **PROCESS** | **DATE** |
| Issue Instructions to Tenders | 22/06/2018 |
| Deadline for clarifications | 11/07/2018 |
| Deadline for receipt of Tenders | 16/07/2018 |
| Evaluation of Tenders | 17-18/07/2018 |
| Clarification Interviews (if required) | 20/07/2018 |
| Award of Contract | 23/07/2018 |
| Contract Start Date | No later than September 2018 |

**Partnership Arrangements**

The successful tenderer will become a named BBO partner and will sign a collaboration agreement within which all organisational based targets and financial profiles will be stated. Partners will be expected to operate collaboratively and in the spirit of partnership. There is a requirement to attend relevant partnership meetings and to network with existing BBO partners.

**Marketing**

Selnet hold a central Marketing budget which is used to support engagement and marketing activities for BBO. If your delivery offer requires some marketing activity, then this can be explored with Selnet as we may be able to support some or all of the costs of this.

**Guidance and Training**

Support will be offered to the successful tenderer on the subject of financial claims submissions and completing participant documentation. As with all ESF funded projects the level of administrative work involved in the BBO projects is high and it is recommended that a suitable level of admin support is built into the costings within your proposal.

**Funding and Payment**

Payment will be made in the form of a grant. Selnet sought VAT advice at the BBO projects bidding stage and was advised that the grant is not within the scope of VAT. That said it is strongly recommended that the successful bidder obtain their own advice on VAT. As an ESF funded grant programme, grant recipients are not permitted to generate profit.

Grant payments will be made quarterly in advance according to an agreed profile, a project expenditure claim must be submitted monthly or quarterly as agreed and any underspend or ineligible spend must be returned to the lead partner. It is the individual partner’s responsibility to ensure that all expenditure is made in line with Big Lottery Fund and European Social Fund requirements. Guidance will be provided within the collaboration agreement, through a partner handbook, and via a dedicated BBO partner website.

**Management information and Security**

Successful partners will be required to use the management information systems and processes provided by Selnet for all participants records and financial claims. You will be required to comply with data security requirements as outlined in the Partnership (Collaboration Agreement) in line with the General Data Protection Regulations.

**Quality, Compliance and Evaluation**

Successful partners will be expected to fully take part in quality and compliance activities facilitated by Selnet and external evaluators and auditors. Partners will be expected to regularly self-assess delivery quality, and to make files and documentation available for regular audits and spot checks by Selnet and the funders.

**Legislation / Health & Safety**

It is expected that it is your policy, as an employer, to comply with your statutory obligations under the key legislative equality acts including but not limited to those listed below:

* Equality Act 2010
* Human Rights Act 1998
* Any other Acts or Legislation that is either in force or comes into force during the contract period for the purposes of this Contract

and accordingly, your organisation’s policies and procedures should not treat one group of people less favourably than others because of their colour, race, nationality, ethnic origin, disability or gender in relation to decisions to recruit, train or promote employees.

**The Authority reserves the right at any time to vary, add to, delete, withdraw from, suspend or terminate the Procurement Procedure, any part of the Procurement Procedure by notice in writing to the tenderers.**

# INSTRUCTIONS FOR TENDER SUBMISSION

Your Tender must be submitted electronically via The Chest - an Electronic Tendering System. Tenders will not be accepted by any other means.

The Tender Return Document attached must be completed and uploaded by you as part of your submission.

|  |
| --- |
| Information to be provided |
| 1. Selection Questionnaire: **Important -** please note that you are required to complete a number of elements of the Selection Questionnaire directly on The Chest supplier portal. You must also complete the questions included in the Tender Return Document.
 |
| 1. References - within Tender Return Document
 |
| 1. Method Statement Responses – within Tender Return Document
 |
| 1. Pricing Information – within Tender Return Document
 |
| 1. **Signed Declaration / Form of Tender –** within Tender Return Document
 |
| 1. **Certificate of Non-Collusion and Non-Canvassing –** within Tender Return Document
 |
| 1. **Confidential & Commercially Sensitive Information -** within Tender Return Document
 |

Your Tender must be received no later than the indicated deadline. **It is important that you allow sufficient time to upload your response to The Chest as any responses received after the closing date and time will register as a late Tender and will be disqualified.**

If you encounter any technical problems associated with this opportunity, please log issues via ProcontractSuppliers@proactis.com or go directly to <http://proactis.kayako.com/default>. For critical and time-sensitive issues (normally requiring resolution within 60 minutes) then please call 0330 005 0352. Supplier help guides are also available on “The Chest” from [www.the-chest.org.uk](http://www.the-chest.org.uk).

**Clarification**

Should you require clarification in respect of anything contained within this Invitation to Tender please submit your question via the Messaging section on The Chest only. Clarifications must be received by 11/07/2018. Clarifications received after this date may not be responded to. Correspondence sent elsewhere will not be processed. The Authority reserves the right to circulate your query and the response, to other Tenderers.

**EVALUATION CRITERIA / PROCESS**

Tender submissions will be assessed on the basis of **90% Quality / 10% Price.** The Quality and Price scores will be added together to give you an overall score.

Tenders will be evaluated by a panel comprised of at least 2 representatives from key project stakeholders on a consensus scoring basis.

**How we will evaluate Quality**

To help us judge your capability to meet our requirements you must respond to a number of Method Statement questions(set out in Tender Return Document). Each of your responses will be evaluated using scores that reflect the extent to which the responses have addressed the published criteria. These scores will then have the published weightings applied and will be added together to give an overall Quality Score.

|  |  |  |
| --- | --- | --- |
| **Question** | **Scoring Guide** | **Max Score** |
| 1. Current Delivery
 | 0 – no projects described1 – limited info given and/or not relevant to beneficiaries 2 – some relevant examples provided and understands funded projects3 – fully relevant examples provided and understands funded projects  | 3 |
| 1. Experience
 | 0 – no relevant experience given1 – limited information given and barely meets assessment requirements 2 – some information given and satisfies assessment requirements 3 – detailed information given and strong response to assessment areas  | 3 |
| 1. Partnerships
 | 1 – limited information given and barely meets assessment requirements 2 – some information given and satisfies assessment requirements 3 – detailed information given and strong response to assessment areas | 3 |
| 1. Your delivery offer
 | 0 – delivery offer not at all relevant to specifications requirements1 – limited information given and barely meets assessment requirements 2 – some information given and satisfies assessment requirements 3 – detailed information given and strong response to assessment areas | 3 |
| 1. Staffing
 | 0 – no staffing plan provided1 – limited information given and barely meets assessment requirements 2 – some information given and satisfies assessment requirements 3 – detailed information given and strong response to assessment areas | 3 |
| 1. Delivery capacity
 | 0 – delivery does not meet the stated minimum number of participants in each area chosen 1 – delivery meets the stated minimums for each area chosen3 – delivery exceeds the stated minimums 5 – delivery exceeds the stated minimums and provides a solid rationale for retaining quality of provision | 5 |

**How we will evaluate Price**

Please complete the Pricing Schedule (included in Tender Return Document). The lowest price submitted (which is assessed as being realistic) will receive the full allocation of marks available. The percentage difference between your submitted price and the lowest submitted price is calculated as follows:

The percentage difference between your submitted price and the lowest submitted price calculated as follows:

$$\% of the available allocation received=1-\left(\frac{Your submitted price-lowest submitted price}{Your submitted price}\right)X 100$$

The Authority cannot guarantee the amount of business which will be generated to the successful tenderer - any stated volumes, quantities or usages are a guide only. Should the requirements or budget alter these will be subject to change and may increase or decrease accordingly. It is expected that the successful tenderer is adequately resourced to accommodate such changes and will provide a total supply / service for the required period, whether greater or smaller at the tendered rates.

Please also note that The Authority will not be liable for any costs / prices not identified in your submission. No responsibility will be borne by the Authority for errors in the Tenderers pricing submission.

The Authority reserves the right to clarify aspects of the tenderer’s financial model and pricing (should they wish to do so) as permitted under Regulation 69 of the Public Contracts Regulations 2015.

Tenderers should be clear that should their offer be accepted, the submitted method statements and pricing will be integral to the contract and will be enforceable under the terms of the agreement.

**Clarification Interviews**

We reserve the right to hold interviews with tenderers and you **may** be asked to attend a formal interview for clarification purposes. This will give the scoring panel the opportunity to re-visit the method statements and this may result in the initial scoring being altered up or down as appropriate.

Please note that should we choose to undertake interviews these will take place on 20th July 2018. We therefore kindly ask in advance that you keep this date free. Due to the tight timescales for this tender, notification to attend may not be sent until 19th July 2018.

**Due Diligence**

The Preferred Tenderer may be subject to a reality check i.e. this may involve (but not limited to): financial viability/risk checks (D&B), a site visit, checking references, checking capability and track record and, where appropriate, speaking to organisations who will be involved in supporting the Partner.

**Financial** A Mint UK Credit Rating will be obtained for the successful tenderer. As part of further due diligence, should the Mint UK Credit Report identify that a tenderer has anything below a ‘normal’ banded credit rating and that tenderer obtains Preferred Tenderer status then a second credit report will be run through Equifax. Should this Equifax credit report determine that the Preferred Tenderer has a score check grade of D+ to F- then additional financial information (as indicated in the tenderer’s Questionnaire response) will be requested from the tenderer and further analysis will be undertaken. This analysis will form an assessment of the solvency and financial strength of the tenderer to provide the services taking into account:

* The credit rating scores
* Key financial ratios
* Liquidity, turnover and profitability

The Authority reserves the right not to enter into a contract with the Preferred Tenderer, should any of the financial assessments demonstrate an unsatisfactory financial standing.

**References**

You are required to provide details of two referees by completing the tables in the Tender Return Document. Should we decide to obtain references the referees will be asked a series of questions around but not limited to the following:

* + What type of service you provided
	+ Period
	+ Value
	+ Current relationship
	+ Reliability
	+ Flexibility
	+ Communication
	+ Compliance
	+ Quality of Monitoring

The Authority reserves the right not to enter into an agreement with the Preferred Tenderer should any of the references prove unsatisfactory.

**Additional Information**

The Authority reserves the right to issue supplementary documentation and information at any time during the tender process to clarify any issue. All such further information issued during the tender process shall be deemed to form part of this process and, where applicable, shall supersede any information provided to the extent indicated in the supplementary documentation.

The Authority may at its absolute discretion reject any Tender submission which does not provide **all** the information required and requested by the Authority, in the form requested. If a bidder fails to complete all of the requested pricing information in the format specified such that it is not possible to evaluate the submitted price, then the bid will be deemed to be non-compliant and will not be evaluated.

The Authority does not bind itself to accept the lowest or any tender and reserves the right to accept the whole or part of any tender. Each party shall be responsible for its own costs in submitting this tender.

If at award stage the Preferred Tenderer chooses not to accept the offer to enter in to an agreement, The Authority reserves the right to award to the next highest scoring tenderer and so on.

If your Tender is successful, you will be expected to provide the services in accordance with the Authority's terms and conditions and specific requirements detailed in this Invitation to Tender.

Neither party will disclose to any third party, except where there is a reasonable requirement to make such a disclosure for legal purposes, any information acquired during the tender process nor whilst performing the work / service during the contract period, without the other parties written consent.