



INVITATION TO TENDER to produce the 2016 – 2018 Local Implementation Plan for the European Structural and Investment Funds in Cheshire and Warrington.

1. Introduction

1.1 Background

Cheshire and Warrington Local Enterprise Partnership covers the Local Authority areas of Cheshire West and Chester, Cheshire East and Warrington. The LEP's ambition is to grow the economy of Cheshire and Warrington from a £19 bn to a £35 bn economy by 2030. The LEP has identified three main strategic priorities: Science Corridor; Atlantic Gateway; and Crewe High Growth City and it is also looking at Energy as a future fourth priority. The competitiveness of local business will be a key driver in achieving this growth.

The Cheshire and Warrington ESIF Strategy provides an important opportunity to drive forward our economic vision in a way that recognises existing strengths and opportunities as well as addressing those issues that are constraining growth. In developing our ESIF strategy, we have been clear that it should be consistent with the vision outlined within our Strategic Economic Plan; to ensure that Structural and Investment Funds play a full part in achieving our overarching goal of improved productivity, by harnessing smart specialisation opportunities, supporting growth sectors across our SME base and providing employment opportunities for all by creating a workforce which meets the current and future needs of business.

Our strategy has been developed in collaboration with all of our key partners to make sure that it is grounded in 'place' and framed by a strong understanding of our economy to ensure that investment is used in the most appropriate way for Cheshire and Warrington. It is rightly ambitious, recognising the relative strengths of our economy, whilst also looking to address the challenges that we face in terms of slowing growth rates and market restructuring within certain sectors and individual places within our economy. The delivery of this strategy will allow us to build upon these recognised strengths and create new opportunities to drive forward growth in a way that is sustainable and inclusive, thereby generating economic, social and environmental benefits.

1.2 Summary of Requirements

The Cheshire and Warrington Local Enterprise Partnership is inviting submissions for the LEP ESIF Local Implementation Plan (LIP) which will set out how the LEP and Local ESIF Sub-Committee wishes to manage the strategic focus, scale and scope of ESIF activity through opt-ins (co-financing with the Department for Work and



Pensions, the Skills Funding Agency and Big Lottery), calls for projects and the associated financial allocations and deliverables.

The LIP will be both a planning and a programme management tool. Later activity in 2017-2018 will focus on the planning aspect (drawing heavily from the Cheshire and Warrington ESIF strategy and Strategic Economic Plan as it is refreshed). Proposed activity in 2016 will have an increased emphasis on proposed calls for projects and expected outputs as the programme rolls out and it becomes possible to supplement the Plan with data drawn from project applications, approvals and actual performance in 2015 to chart the delivery of the ESIF. It will also be important to show how ESIF delivery contributes to the delivery of the Strategic Economic Plan for Cheshire and Warrington and the National Operational Programmes for ERDF (European Regional Development Fund), ESF (European Social) Fund and EAFRD (European Agricultural Fund for Rural Development). To do this it will be necessary to make a limited number of updates to the Cheshire and Warrington ESIF including the re-introduction of priority axis 2 (ICT and Broadband) and the re-allocation of outputs attributed to the Cheshire and Warrington ESIF by Government.

The LIP aims to guide European Structural and Investment Funds investment in Cheshire and Warrington over the full period from 2015 to 2020+. Over this period, changes will inevitably occur in the economy and the ESIF will be updated and will include a LIP setting out current opportunities and challenges for Cheshire and Warrington and proposed key interventions to the mid-term review in 2018. However, it is anticipated that the themes of this document will remain consistent, allowing Cheshire and Warrington to focus on exploiting its strengths and addressing weaknesses, creating a stronger economy that excels not only in a Northern Power house context but also across the national LEP peer group and provides opportunities for all.

2. REQUIREMENTS

2.1 Overview

The LEP Cheshire and Warrington LEP is seeking to appoint a suitably experienced and qualified partner to develop a LIP that sets out how the ESIF will be delivered to meet our SEP priorities.

The Plan will be a three year plan primarily capturing information from activity in 2015, information provided by Government, partners and the LEP and a forward plan of activities, financial profiles, charts and outputs. This will include updating the ESIF Strategy primarily through updating the terminology to align the ESIF with the National European Operational Programmes and reintroducing broadband activity, updated Government targets and specifying certain rural activity.



The LIP should set out priority projects, interventions and future calls for the ESIF programme during 2015-2018, and be updated as and when required to reflect updates to the ESIF such that the LIP and ESIF Strategy support each other and establish a clear alignment with the SEP.

2.2 Specification

The LIP should cover activity over the first half of the programme that will be brought into the programme through calls opened during 2015, 2016, 2017 and 2018 bringing the ESIF strategy up to the midterm review including allocations made to opt-in organisations (The Department for Work and Pensions, Skills Funding Agency and Big Lottery).

The LIP should:

- Identify whether programme activities would be through opt-in provision or calls for projects.
- Identify the revised amount of ESIF the Local Sub Committee wishes to allocate to stated priorities and the source of ESIF funds as set out in the ESIF, unless otherwise specified, taking exchange rate fluctuations into account.
- Update and confirm, as required, the revised ESIF deliverables or outcomes expected from activity (skills, business assists, new products to market or new products to the business) as set out by Government.
- Feature a high level risk analysis for LIP implementation, identifying key risks and dependencies, essentially reflecting on and building on the LEPs own risk management analysis.
- Incorporate and build on LEP Project Call Programme (available on request) summarising the key milestones of programme delivery. (See <http://www.871candwep.co.uk/library/> for current documents).
- For each of the Priority themes against each Axis, provide details¹ of the type of investments the LEP and local ESIF sub-committee have or would like to bring into the programme pipeline through calls issued in 2015, 2016, 2017 and 2018 and opt-in provision agreed in 2015-2018.
- Describe how investments would be brought forward in a structured and sequential manner, meeting LEP expectations that calls provide a clear indication of the investments sought and how these meet the LEP requirements in terms of outputs and align with previous calls.
- Define key programme milestones and provide approximate timescales for key activities, meetings, events e.g. when calls will be launched and closed and when local sub-committees will be held to review outline applications for prioritisation / ranking and when applications should be submitted.

¹ It would be expected that there will be greater detail provided for investments scheduled for earlier in the programme with a clear fit demonstrated with delivery of the SEP.



- Provide an overview of a recommended Governance and decision making processes to oversee the delivery of the Local Implementation Plan and the ESIF Strategy.
- Set out the suggested priority areas for investment under the Financial Instruments building on evidence from analysis of delivery of the North West Fund in Cheshire and Warrington and recommend any further work required to support these recommendations. (See: <http://www.thenorthwestfund.co.uk/>)

2.3 Delivery Approach

The Appointed Consultants will be expected to:

- Engage with the LEP Executive, DCLG and ESIF Committee in delivering the specification and adhering to the proposed call time table and performance management arrangements.
- Have cognisance of previous LEP / Government commissioned studies and documents including²:
 - Operational Programmes for England (2015) ESF/ERDF/EAFRD
 - Opt-In Agreements / MOUs / e.g. SFA, BLF / DWP.
 - ESF ITTs
 - European Structural and Investment Fund Strategy (2014 / 2015)
 - LEP Proposed calls and projects under development (2015)
 - Draft work undertaken to identify Financial Instrument investment priorities
 - Strategic Economic Plan (2013 and updates)
 - 2006-2013 ERDF Programme – Local Projects (e.g. Connecting Cheshire).
 - Cheshire and Warrington Skills Strategy
 - LEP Risk and Gantt charts etc.
- Provide output charts electronically in the form of excel charts to enable the updating of future relevant outputs.

See: <http://www.871candwep.co.uk/library/page/2/>
<https://www.gov.uk/european-structural-investment-funds>
<https://www.gov.uk/government/policies/european-funds>



2.4 Programme Management Arrangements

Day to day project management will be provided by Francis Lee, the LEP's Head of EU Programmes. The successful consultant will be expected to attend regular (fortnightly) progress meetings during the course of the commission and liaison via telephone and e-mail with officers and key stakeholders as necessary.

Any clarifications to information contained in this document must be submitted by email to Francis no later than 9 October 2015. Any additional information provided will be made available to all potential Tenderers via the LEP website after this date www.871candwep.co.uk.

Email: francis.lee@871candwep.co.uk

2.5 Timescales

The key dates for this procurement (**Timetable**) are currently anticipated to be as follows:

Event	Date
Deadline for receipt of clarifications	08:30 A.M. 9 October 2015
Deadline for receipt of Tenders	08:30 A.M. 20 October 2015
Evaluation of Tenders	23 October 2015
Approvals and Contract Agreement	30 October 2015
Contract start date	2 November 2015
Interim Report	11 December 2015
Final Report	29 January 2016

3 RESPONDING TO THIS SPECIFICATION

Tenders must address all the requirements and be in the format requested below. Tenders not in this format **will not be considered**. Tenderers are requested to provide core information in summary form with detail in appendices.



The following must be supplied:

3.1 General

- i. Organisation identity including name, address, telephone number, e-mail address, company registration number, VAT registration number and website address (if applicable).
- ii. Details of the main point of contact within the organisation for this tender.
- iii. Name, address, telephone number and e-mail address of any third parties involved in this tender.
- iv. Response to Schedule 1
- v. Completed and signed Schedule 2

3.2 Pricing

The cost associated with delivering the work programme. All prices must be fixed and firm, quoted in pounds sterling and exclusive of VAT. Tenderers should detail any ancillary costs and expenses included in the price. Note that the budget for this work is in the range £20k-£30k (plus VAT if applicable).

3.3 Submission Instructions

The LEP will only accept tender submissions made via e-mail to francis.lee@871candwep.co.uk. The **deadline for submission of completed tenders is 08:30 A.M. 20 October 2015**. The completed tender submission must be submitted by no later than the time and date specified above. Bidders are advised to allow adequate time for uploading documents and to dispatch the electronic response well in advance of the closing time to avoid any last minute problems. Failure to submit the tender submission as required will result in the relevant Bidder being excluded from any further participation in this procurement. Any tender submitted and or received after the time specified above will not be considered and the Bidder will be advised of this. Please note that submissions not received via the means identified in the ITT will not be accepted or considered.



Bidders are also welcome to provide hard copies of their tender following submission of their bid in accordance with above. Any hard copies should be addressed as follows:

Name: **Francis Lee**
Address: **Cheshire and Warrington LE P**
Richmond House, Gadbrook Business Park, Rudheath,
Northwich, CW9 7TN

4 EXAMINATION AND EVALUATION OF TENDERS

4.1 Award Criteria

Tenders will be assessed initially by reference to the following pass / fail criteria:

- (i) Completeness of proposals and tender documentation as specified in Section 3 (Responding to this Specification);
- (ii) Stated ability of the Tenderer to meet all of the requirements specified in Section 2 of this document;

The Bidder which passes the pass/fail criteria above and is awarded the highest combined mark in the 'Price' and 'Quality' sections will be awarded the contract.

In the Price section, the LEP is evaluating how the Bidder cost compares against the cost of other submitted tenders. There are 10 points available for Price and the lowest cost bid will be awarded 100% of these with the other bids receiving a proportion based on the following formula:

Bid's Score = $10 \times (\text{lowest total cost} / \text{bid cost})$

In the Quality section, the LEP is evaluating how the Bidder will ensure it delivers the services in a way which complies with the LEP's requirements in relation to the Specification (Section 2.2) and the Delivery Approach (Section 2.3). Schedule 1 sets out [six] questions which explore these aspects and the responses will be scored using the pre-determined scoring system set out below.

Excellent	76-100%	A comprehensive response which provides information that is highly relevant and fully answers the question.
Good	51-75%	A detailed response which provides information that is relevant and substantially answers the question.



Satisfactory	26-50%	A response which provides information that is generally relevant and answers the majority of the question.
Poor	1-25%	A response which provides information which is only partially relevant and/ or answers only a small proportion of the question.
Unsatisfactory	0%	A response which does not provide information which is relevant and does not answer the question or no response is provided.

There are 90 points available for Quality with these being allocated as follows:

Question	Maximum Points Available
1	35
2	25
3	10
4	10
5	5
6	5
Total	90

4.2 Clarification

During the evaluation period clarification may be sought via e-mail from Tenderers. Responses to requests for clarification may not materially change any of the elements of the tenders submitted.

[The LEP may choose to invite bidders to make presentations on their proposals for the purpose of elaboration, clarification and / or aiding mutual understanding.

Presentations would be held on [x] 2015.

5 GENERAL INFORMATION

5.1 Financial Arrangements

Payments for services covered by this invitation to tender will be on submission of appropriate invoices, subject to Cheshire and Warrington LEP's standard payment terms, and which will be based on agreed deliverables. Invoicing arrangements will be agreed with the successful provider, following the award of contract.

5.2 Contract



A contract will be awarded to the Tenderer whose proposal is deemed to be the most economically advantageous subject to agreement on conditions of that contract.

Please note that the LEP reserves the right to cancel the Tender process at any time prior to a contract being entered into.

The LEP is not bound to accept the lowest price, or any tender submitted.



Schedule 1 – Information Requirements
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1. Please set out your experience of undertaking economic analyses of relevance to this assignment, detailing the nature of the commissions and identifying the personnel involved and their roles. (45)
2. Please provide the names and CVs of the team that you would deploy on this assignment along with a description of their respective roles and particularly highlighting their specific experience of EU funding programmes and processes. (20)
3. Please describe your experience and knowledge of EU financial engineering instruments.
4. Please provide a project delivery plan with supporting narrative that explains how the requirements of this brief will be delivered and project managed.
5. Please provide a risk register that features your assessment of the key risks associated with the delivery and maintenance of the LIP as well as appropriate management and mitigation steps.
6. Please describe how you will quality will be assured in the delivery of your work.



Schedule 2 - Declaration

I/We the undersigned, hereby quote to supply the goods / service / products detailed in this tender, at the respective prices quoted. (Prices must not include VAT).

I certify that as far as I know, the information I have supplied is accurate.

I/We agree that this tender shall remain open to be accepted or not by the LEP for a period of six months from the closing date for the receipt of tenders.

I/We agree that the LEP may discontinue the tendering arrangements at any time before a tender has been accepted.

I/We accept the specification and terms and conditions accompanying the request for tender and undertake to be bound by them if my/our tender is accepted by the LEP.

I/We certify that I/we have not now or will in the future, canvassed or solicited any representative or employee of the LEP and any other companies in the group of which the LEP forms part, in connection with this tender and that to the best of our knowledge and belief no person employed by me/us or acting on my/our behalf has done such an act.

I/We understand that the LEP is not bound to accept any tender and will not be liable under any circumstances whatsoever for the costs I/we have incurred in preparing the tender.

The tender submitted herewith is a bona fide tender intended to be competitive.

We have not fixed or adjusted the amount of the tender by or under or in accordance with any collusive agreement or arrangement with any other person.

NAME OF CONTACT:	
DESIGNATION:	
COMPANY NAME:	
ADDRESS (including postcode)	
TELEPHONE:	
FAX:	
EMAIL:	
SIGNATURE:	
DATE:	