



## **INVITATION TO TENDER - BUILDING LEGACIES TRAINING & EVENTS PROGRAMME (Multi-disciplinary)**

### **1. Introduction**

This document outlines the requirements of the 'Building Legacies' programme, which is being delivered by East London Business Place (ELBP) in partnership with Newham College's Apprenticeships, Partnerships and Innovation Department (API), and which provides tailored support solutions for London-based Small, Medium and Micro Enterprises (SMMEs) seeking competitive business advantage.

Part-funded by the European Regional Development Fund (ERDF), the purpose of this initiative is to deliver a sustained support programme tackling gaps in SMMEs' growth, innovation, contract-readiness and knowledge of procurement and supply-chain requirements until December 2021.

Target market and sectors (predominantly but not exclusively)

- Digital/Creative
- Care
- Construction

Targets and KPIs

- 350 x 12 hour SME supports (min 12 hours)
- 85 x 'new to the firm' product introductions
- 45 x new enterprises supported
- 52 x jobs created

The Building Legacies training and events programme will provide robust business support and networking opportunities to its clients via the usage of external expert consultants and trainers. The main focus for Building Legacies is to differentiate its approach, proposition and focus by offering a variety of events which focus on business growth in key areas and also provide hands on practical outcomes and takeaways.

Building Legacies has undertaken extensive client research via diagnostics, 1-2-1 engagements and focus groups to better understand the training needs of its clients. The outcome of this research has effectively dictated the proposed training programme which will ensure that clients have access to the training required to help grow their business.

The training programme is planned to be delivered through a series of training workshops and (where applicable) associated 1-2-1 activity between August 2019 and April 2020.

## **2. Requirements**

- To create and deliver a consistent programme of training in one or more of the above areas as outlined and defined in table A.
- To deliver workshop topics as detailed in table A, whilst being flexible and innovative where Building Legacies business requirements and programme need dictate required topic and content amendments (this may include training sessions specifically for the Building Legacies Business Growth Management Team).
- To provide either half day workshop sessions (typically from 09:00am – 13:00pm or 13:00pm to 17:00pm) or a series of smaller 2 hour workshops, either in the morning, afternoon or evening.
- To facilitate and run the training sessions at venues across London (Building Legacies will be responsible for all venue arrangement and liaison).
- To provide and supply relevant training material and visual aids which are of a high standard and approved in advance by the Building Legacies event management team.
- To print and supply ALL physical handouts and material for ALL delegates at every training workshop and 1-2-1 engagement.
- To provide workshop content, marketing information, trainer/consultant biographies and presentation slides at least 4 weeks in advance of each workshop, to assure optimum marketing and promotional opportunities (and recruitment of workshop-relevant SME clients) by Building Legacies
- To develop and deliver content that delegates find useful, so they are able to come away from the session with a clear understanding of what they should practically do next, as opposed to just an overview of subject theory.
- To assist with workshop promotion and awareness-raising of the Building Legacies brand, through social and other appropriate media, including at least one written article on the subject area for marketing purposes/distribution pre, during or post event.
- To have clear tangible outcomes by the end of each workshop (e.g. reports/strategies/customisable templates etc), to facilitate further support by Building Legacies' Business Growth Managers, or 1-2-1 engagements where and if appropriate.
- Workshops should be comprised of the following as a minimum:
  - Introduction and networking
  - Information packs for delegates, relative to the workshop delivered

- Presentations that can be distributed or shared online with workshop attendees
  - Interaction with the delegates in the form of group discussion
  - Practical exercises leading to one of Building Legacies stated outcomes wherever practicable
  - Useable subject matter 'take-away' for all attendees
  - Question and answer session
  - Digitally inclusive content and interaction
- Workshops should not:
    - Be delivered as lectures
    - Be "data-dumps"
    - Contain excessive volumes of presentation slides (50 maximum, unless required due to subject material, and explicitly agreed in advance by Building Legacies)
    - Be self-promoting
- One-to-one consultancy should adhere to the following principles as a minimum :
    - The 4 hours support should be comprised of face-to-face meetings, telephone calling, online-video calling, emails and research, as appropriate to the needs of the client and engagement.
    - The trainer/consultant is responsible for agreeing with the SME client the venue and timing of the 1-2-1 engagement.
    - Building Legacies are not responsible for securing venues for 1-2-1 engagements.
    - The engagement should achieve the specific outcome/s set out by the Building Legacies team, subject to extenuating circumstances.
    - The trainer/consultant must provide full documentary evidence of the support provided, via a full written summary on standard Building Legacies client meeting documentation, which must be agreed as factual and signed by the client.
    - All original copies of said evidence must be sent/provided to the Building Legacies team, together with a further minimum one-page company letter-headed report (and any other relevant attachments) outlining further supporting details.
    - To provide and complete all 1-2-1 consultancy engagements within a reasonable time-frame (maximum of 2-3 weeks following engagement of the trainer/consultant by Building Legacies), subject to extenuating circumstances, which must be agreed by Building Legacies in advance.

All submissions should consist of detailed plans for a range of high quality workshops for the programme, covering (but not strictly limited to) those subjects and associated areas as outlined in table A below.

You are therefore invited to submit a proposal to provide one of more of the lots shown below.

**Table A**

| <b>Title</b>  | <b>Topic Examples</b>   | <b>Expected Workshop Outcomes Examples</b>  |
|---|---|---|
| <b>Lot 1 – Procurement &amp; Tendering</b><br><br>(Maximum of 5 x workshops and 8 x 1-2-1 sessions)   | <ul style="list-style-type: none"> <li>• PQQ &amp; ITT</li> <li>• Public &amp; Private sector procurement</li> <li>• Care sector procurement</li> <li>• Policies, accreditations and e-portals</li> <li>• Tender Writing</li> <li>• Understanding social Value, section 106 &amp; CSR</li> </ul>                                    | <ul style="list-style-type: none"> <li>• Completing a procurement action plan</li> <li>• Completing PQQ / ITT</li> <li>• New policies</li> </ul>  |
| <b>Lot 2 – Care sector including capacity building for DOM care and CARE homes</b><br><br>(Maximum of 5 x workshops and 8 x 1-2-1 sessions) | <ul style="list-style-type: none"> <li>• GDPR (care specific)</li> <li>• Digital – Smartcare / AI</li> <li>• Policies review (to meet statutory requirements and get procurement ready)</li> <li>• People (customers, staff and the voluntary sector)</li> <li>• Funding and contracts for CQC and non-CQC organisations</li> </ul> | <ul style="list-style-type: none"> <li>• Specific action plans completed</li> <li>• New or revised specific policies</li> <li>• New communications, recruitment or marketing process</li> <li>• New service identified</li> <li>• New e-portals joined</li> <li>• Potential contract wins identified</li> <li>• Networking opportunities</li> </ul> |
| <b>Lot 3 – Mobile Content Development for Video</b><br><br>(Maximum of 3 x workshops and 4 x 1-2-1 sessions)                                | <ul style="list-style-type: none"> <li>• Youtube vlogging from your phone</li> <li>• Video campaigns – pitching and confidence building</li> <li>• Content building from your phone</li> </ul>  | <ul style="list-style-type: none"> <li>• Producing a short video</li> <li>• Video strategy</li> <li>• Making a digital case study</li> <li>• Setting up a new account</li> <li>• New service</li> </ul>   |

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| <p>Lot 4 – Mobile Content Development for Photos</p> <p>(Maximum of 3 x workshops and 4 x 1-2-1 sessions)</p> | <ul style="list-style-type: none"> <li>• Creating Product photos from your phone for website and social media use</li> <li>• How to create events and scenery images</li> <li>• How to create professional profile and business photos</li> </ul>  | <ul style="list-style-type: none"> <li>• Producing images for online use</li> <li>• Producing a digital strategy/plan</li> <li>• Setting up a new account</li> <li>• New service</li> </ul>   |
| <p>Lot 5 – Marketing for the digital future</p> <p>(Maximum of 5 x workshops and 8 x 1-2-1 sessions)</p>      | <ul style="list-style-type: none"> <li>• Research for quality content building</li> <li>• Branding – development, creation and implementation</li> <li>• Website Development – evaluate/grow</li> <li>• Website Creation - build/create using tools like WordPress</li> <li>• Online Marketing – social media, SEO</li> <li>• marketing campaigns</li> <li>• PR to grow your business</li> </ul> | <ul style="list-style-type: none"> <li>• Introducing a marketing/business plan or strategy</li> <li>• Compiling new content</li> <li>• Updating website</li> <li>• Creating new content</li> <li>• Introducing a CRM system</li> <li>• New service</li> </ul>   |
| <p>Lot 6 – Sales &amp; Pitching and Presenting</p> <p>(Maximum of 5 x workshops and 8 x 1-2-1 sessions)</p>   | <ul style="list-style-type: none"> <li>• E-mail Sales Campaign – creating online interest</li> <li>• Digital Sales Tools such as CRM systems</li> <li>• Selling to larger organisations</li> <li>• Lead Generation</li> <li>• Cold Calling</li> <li>• Developing your proposition</li> <li>• Sales forecasting</li> <li>• Social Value</li> </ul>  | <ul style="list-style-type: none"> <li>• GDPR action plan</li> <li>• New policies</li> <li>• Strategy</li> <li>• Terms &amp; Conditions</li> <li>• Legal documents</li> <li>• Introducing a plan or strategy</li> <li>• Introducing a CRM system or sales tracking system</li> <li>• New service</li> </ul> |
| <p>Lot 7 – Attracting Investor Interest</p> <p>(Maximum of 5 x workshops and 8 x 1-2-1 sessions)</p>          | <ul style="list-style-type: none"> <li>• What are the different fundraising options?</li> <li>• Explore borrowing options</li> <li>• Grants and R&amp;D credits</li> <li>• Pitch decks</li> <li>• Equity finance and crowd funding</li> <li>• Preparing a pitch (practice opportunity identifying a winner on</li> </ul>   | <ul style="list-style-type: none"> <li>• Specific action plans completed</li> <li>• Signing up to new portals</li> <li>• Preparing / delivering first investor pitch</li> <li>• Grant / R&amp;D applications</li> <li>• SEIS / EIS applications</li> </ul>  |

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|  | the day) <ul style="list-style-type: none"> <li>• SEIS, IES</li> <li>• Going to market / market testing</li> <li>• Intellectual property</li> <li>• Sales forecasting</li> <li>• Hints &amp; Tips</li> <li>• Social Value</li> </ul> | <ul style="list-style-type: none"> <li>• Preparing a pitch deck / business plan</li> </ul> |
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### **1-2-1 Consultancy**

In addition, your submission should also include associated post-workshop (and, where required, 'stand-alone') 1-2-1 consultancy which is designed to provide more intense client-specific sessions, with defined outcomes as dictated by the Building Legacies team.

Said sessions should typically be for a half-day (4 hour) duration, although 2 hour sessions may be permitted where suggested as appropriate to client need by the trainer/consultant, and agreed by Building Legacies in advance.

### **3. Proposal Submission**

Organisations are invited to submit their proposal/s, which should each be submitted separately and be no more than 6 pages per lot, including any web-links and attachments (copies of policies and insurance cover must be provided, but can be in addition to the maximum 6 pages).

Organisations are therefore requested to supply a full proposal which responds directly to the requirements outlined in this tender document and includes:

- Professional capacity and expertise – i.e. company/individual profile highlighting experience of delivering similar workshops and training sessions
- Evidence of previous client feedback, testimonies, case studies etc.
- Knowledge and experience in the proposed business discipline/s
- A brief outlining how the requirements of this tender are going to be addressed, the proposed/likely content of each workshop, based (as a minimum) on the topic examples detailed in Table A above
- Any additional benefits/value added features which will be provided
- Costs for both half-day workshop / seminars or two hour sessions as requested by the Building Legacies team. (Your proposal should be based on a maximum of £500 inclusive of all travelling/ancillary expenses and VAT per half day session, or pro-rata for two hours session, and an assumed maximum equivalent to the outlined sessions for each Lot)
- Costs for 1-2-1 consultancy based on a half day or pro-rata hourly rate (based on a maximum £500 inclusive of all travelling/ancillary expenses and VAT per

half-day, and an assumed maximum equivalent to the outlined sessions for each Lot)

- Details of any assumptions that have been made
- Provision of relevant policies and insurance cover
- Provision of evidence to demonstrate organisational GDPR compliance, including but not strictly limited to those controls which would protect Building Legacies and Building Legacies' clients from any loss of data and/or viruses and cyber-attacks
- Ability to adhere to the timescale detailed in section 6 below
- Confirmation that no conflicts of interest would arise in managing this brief
- A point of contact for correspondence

#### **4. Contract Value**

The contract value is up to £6,500 including VAT **per lot** for Lots 1, 2, 5, 6 and 7 above for the period of this engagement i.e. August 2019 to April 2020.

The contract value for lots 3 and 4 above is up to £3,500 including VAT **per lot** for the period of this engagement i.e. August 2019 to April 2020.

Please note – VAT. If you cannot recover VAT for the project you should include VAT within your project costs. If you are able to recover VAT it should be excluded. In the event of your bid being accepted you will not be able to charge VAT on top of project costs. You are responsible for determining your own VAT recovery position and should submit cost proposals accordingly.

If successful, the above does not constitute the awarding of anything further than a minimum one x half-day's workshop or 1-2-1 training provision. The proposed programme may be subject to change and will be at the total discretion of Building Legacies, according to the requirements of the business and programme need.

#### **5. Evaluation Criteria**

**Contract will be awarded based on:**

- Value for money: cost and value added to the Building Legacies programme (40%)
- Suitability, knowledge and experience in the field (50%)
- Availability (10%)

## **6. Timescale**

**Proposals no longer than 6 sides of A4 per lot must be submitted by 12.00pm on 7<sup>th</sup> June 2019 by e-mail to [ELBP.procurement@CanaryWharf.com](mailto:ELBP.procurement@CanaryWharf.com)**

Please note, no other method of submission will be accepted and any received after this time and date will not be considered.

*Shortlisted organisations may be invited to make a presentation to a selection panel, and will be notified if this is required.*

*The successful organisation/s will be expected to attend a \*mandatory group session on the afternoon of 15<sup>th</sup> July where all successful trainers/consultants, venue providers and the Building Legacies team will be present to discuss the forthcoming programme, synergy areas across all providers and all mandatory process, outcome and reporting requirements.*

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| Invitation to tender sent out                 | 24 <sup>th</sup> May 2019                 |
| Submission deadline                           | 7 <sup>th</sup> June 2019<br>(12.00 Noon) |
| Presentation to selection panel (if required) | 17 <sup>th</sup> June 2019                |
| Estimated notification of outcome             | 28 <sup>th</sup> June 2019<br>(17.30)     |
| *Mandatory group session for providers        | 15 <sup>th</sup> July 2019<br>(p.m.)      |
| Contract delivery to commence                 | 12 <sup>th</sup> August 2019              |
| Contract completion                           | 30 <sup>th</sup> April 2020               |

Building Legacies is not bound to accept the lowest priced Quotation or indeed any Quotation. Building Legacies also reserves the right to accept all or any part of a Quotation. A final decision on the award of contracts will be subject to the satisfactory outcome of any negotiations, or any outstanding issues being resolved. Documentation received in response to this invitation to tender shall be treated as private and confidential except where the disclosure is required by law.

The successful applicant will be offered a contract with Building Legacies based on the tender submitted and will be expected to deliver the activities and outputs specified. All expenditure and activity must be completed by the date stated in the tender specification.

Payments will be based on a structured invoicing schedule supported by evidenced delivery of the agreed targets and outcomes.