**Client:** **Council of the Isles of Scilly (CIOS) – Voucher Scheme Programme (VS)**

**Date: 11th March 2022**

**Area: Invitation to tender for Summative Assessment Project Evaluation Services**

1. **Introduction, background IOSVS in business context**

The Council of the Isles of Scilly is the Accountable Body for the European Regional Development Fund (“ERDF”) funded Isles of Scilly Voucher Scheme Extension Programme (“IOSVS”). This was an extension to the first Isles of Scilly Voucher Scheme.

The IOSVS programme is financed by the Cornwall & Isles of Scilly European Regional Development Fund (ERDF), part of the European Structural Investment Fund (ESIF) portfolio 2015 to 2020. The Department for Levelling Up Housing and Communities (formerly MHCLG) is the managing authority for the fund, which was established by the European Commission to help improve the competitiveness of SMEs by increasing their capacity and capability and promoting entrepreneurship to strengthen the pipeline of high growth business across England.

The IOSVS programme supports new and existing businesses to achieve growth through delivery of the programme outputs. The programme works close with IOS Island Futures board to ensure strategic fit with local priorities. The contract period for this programme was initially January 2019 – December 2021. This has been further extended until 31 December 2022.

The IOSVS programme has been designed to deliver ERDF PA3 under the following priorities

* ERDF 3a – promoting entrepreneurship/ in particular by facilitating the economic exploitation of new ideas and fostering the creation of new firms, including through business incubators
* ERDF 3c – Supporting the creation and the extension of advanced capacities for product and service development
* ERDF 3d – Supporting the capacity of SMEs to grow in regional/ national and international markets/ and to engage in innovation processes

Potential beneficiaries are defined as either:

* An individual who wants to become self-employed/company/partnership and start trading
* An existing business (SME) who has an idea, which leads the business to growth

The Voucher Scheme programme aims to:

* Provide investments to island-based SMEs leading to long term, sustainable business growth.
* Support businesses to implement and realise their growth ambitions in line with the OP EUSIF and Islands Futures plan
* Grow GVA and create additional jobs in supported businesses

The programme also offers support to all applicants by referral to Cornwall & Isles of Scilly Growth Hub for ongoing business support and recommendations to other available funds.

Entry to the programme is by submitting an expression of interest form from [vouchersheme@scilly.gov.uk](mailto:vouchersheme@scilly.gov.uk)

1. **ERDF Summative Assessment Objectives**

The ERDF grant funding agreement places a requirement on grant recipients (COIS) to undertake a summative assessment of the funded programme. The summative assessments are intended to provide insights into programme performance, in order to:

* Enhance their implementation
* Provide reliable evidence of their efficiency, effectiveness and value for money
* Provide insights into what interventions work, reasons and lessons for the future

The summative assessments will help to understand the difference the programmes have made in the local economy, communities and beneficiary groups. In addition, they will improve the effectiveness of measures in relation to economic growth in the future.

In line with latest ERDF guidance published in July 2020 (as noted below), COIS VS are now seeking quotations from highly experienced and qualified suppliers for the provision of a summative assessment for the VS programme.

ERDF Guidance

ERDF has recently published updated guidance on the project evaluation summative assessments which all suppliers must comply with – see links below for latest guidance:

* ESIF GN-1-033 - ERDF Summative Assessment Guidance -  <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/896857/ESIF-GN-1-033_ERDF_Summative_Assessment_Guidance_v4.pdf>
* ESIF GN 1-034 - ERDF Summative Assessment Guidance –
* <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/915448/ESIF-GN-1-034_ERDF_Summative_Assessment_Guidance_Appendices_v4_updated.pdf>
* *ESIF Form 1-014 – Summative Assessment Report Summary – attached Appendix 1*
* *ESIF- Form 1-012 ERDF Summative Assessment Plan Form 1- attached Appendix 1- please note that Voucher scheme has previously submitted SA plan, which can be amended in Finalisation of methodology phase.*
* ***Updated versions will be made available as soon as possible***

The supplier will be expected to undertake a summative assessment and provide a full report together with a final summary in line with the requirements of this quotation document and above ERDF guidance.

*(NB above guidance subject to change – suppliers are expected to check and comply with latest ERDF guidance as amended.)*

1. **IOSVS Programme Overview**

IOS Voucher Scheme is a 36 months(before extension) £2,15 Million programme (£1.32m ERDF) to deliver funding in support of ERDF 03 Priority Axis – Enhancing the Competitiveness of small and medium enterprise (SMEs).

The programme is contracted to deliver following outputs:

* ER/C/O/01- Number of enterprises receiving support-**55**
* ER/C/O/02- Number of enterprises receiving grants-**55**
* ER/C/O/05- Number of new enterprises supported- **10**
* ER/C/O/06- Private investment matching public support to enterprises(grants)-£**829,686**
* ER/C/O/08 – Employment increase in supported enterprises- **12\***
* ER/C/O/28- Number of enterprises supported to introduce new to the market products-**1**
* ER/C/O/29- Number of enterprises supported to introduce new to the firm products- **35**
* ER/P/O/02- Public or Commercial building build or renovated- **500m2**

\*decreased from 22 following PCR after Covid-19

The programme is administered by Council of the Isles of Scilly, which are active members of the LEP, ITI Board, Employment and Skills Board and the Growth Hub.

The ultimate project goal is to aid transformation of the Isles of Scilly economy by offering investments of between £1,000 and £100,000 to SMEs located on the Isles of Scilly through a Council led managed Voucher Scheme. This will support business growth and higher paid jobs on the Islands. With project/asset/capital costs averaging 40% more on the islands due to freight and limited access to services, many commercial and business ambitions are unacted upon. Vouchers will lead to long term, sustainable business growth including higher value job creation and an increase in GVA by addressing the additional costs island businesses face delivering projects on the island.

Investments have been made in the following (non-exhaustive) activities:

• Access to new markets,

• Technology and product design,

• Environmental measures,

• Research and development activities,

• Workspace,

• Equipment,

• IT solutions,

Business growth is delivered by a wide range of outputs evidenced and recorded by the monitoring process.

1. **Programme Objectives & Impacts-**

**The objectives of the project are to:-**

• Deliver a fully compliant voucher scheme offing to SMEs on the Isles of Scilly match funding up to £100,000 to support eligible projects which increase productivity, promote entrepreneurship activity, assist in the exploitation of new ideas and innovative processes, and assist the capacity of island businesses to grow in region, national and international markets.

• Work alongside the Growth Hub and guide applicants to access other business support to enable the creation of a bespoke, credible growth strategy assisting businesses on an effective journey towards growth.

• Make certain that businesses recognise the importance of sustainable development for the future of the islands and incorporate the aims of the Cornwall and Isles of Scilly Local Enterprise Partnership’s European Structural and Investment Funds Strategy.

• Ensure the scheme is fully publicised offering all businesses an equal opportunity to apply

• Offer businesses an efficient, professional and well managed project, to ensure the support provided is accurate, compliant and beneficial to the business.

• Support a predicted 55 applicants across all islands throughout the lifetime of the project, minimising risk.

• Allocate ERDF investment to drive growth and productivity in a geographically isolated location in a less developed region.

The project is continually monitored and evaluated at quarterly intervals by the Island Futures Board with regard to performance, outputs, spend, business applications, successful applications, cross cutting themes and type of business supported. The continual monitoring and review will allow for the successful, efficient and inclusive delivery of the project by highlighting the need for improvement in performance, gaps in delivery and where training is required.

**The programme aims are:**

* Provide investments to island based SMEs leading to long term, sustainable business growth.
* Support businesses to implement and realise their growth ambitions in line with the OP EUSIF and Islands Futures plan
* Grow GVA and create additional jobs in supported businesses
* Promote and deliver a compliant voucher scheme on the Isles of Scilly including but not limited to, the creation of all systems and proportionate paperwork, State aid management, processing and cash flowing of voucher payments and evaluating the impact of the voucher

**Intended impacts the programme is hoping to achieve (direct result from delivery of the contracted outputs for the programme):**

* To increase the level of goods and services on offer on IOS
* To increase entrepreneurial ambition within IOS
* To embed a thriving and sustainable start-up and growth culture in IOS
* To increase the total GVA in the regional economy (IOS)
* To increase the number of sustainable jobs available in the regional economy (IOS)
* To increase sustainability, viability and environmental protection in IOS business economy
* To increase local collaboration and local production on IOS to help minimise import of goods and in turn minimising the carbon footprint of IOS as a whole

Applicants to the Voucher Scheme need to evidence in their application that:

* There is a specific opportunity or demand that the voucher will fulfil
* The voucher benefits the IOS as a whole
* Commitment to growth through

a) a clear plan for the future post voucher

b) a commitment to recruit candidates most able to help in growing the enterprise (including advertising jobs in the local area and recruiting objective)

c) a commitment from the applicant to the day-to-day running of the enterprise

* The rationale provided is strong and supports the creation/expansion of the enterprise
* The business will be enhanced or improved (not maintained)
* Improvements in productivity/create a highly productive business
* "Creation of quality, skilled jobs/apprenticeships, or
* Jobs in line with the needs of the area, or
* Self-employment with a demonstrable plan for future full-time employment"

The Voucher Scheme will not support applications that:

* Provide no opportunities or potential for growth or have no demand
* Displace existing provision
* Relocation without increases in economic activities and jobs
* Don’t demonstrate increases in productivity
* Are "Business as Usual"

In the initial stages of planning IOSVS has drawn up a plan of potential project number, project amounts and intervention rate applicable to be able to reach the contracted 61.53% ERDF intervention rate.

Where possible and unless a project brings benefits above and beyond the programme contracted outputs IOSVS has followed the plan and has awarded financial support in the ranges from the table below.



1. **Stakeholders**

Stakeholders that may need to be consulted with during the evaluation process include:

* IOSVS- delivery teams and staff
* Island Future Board
* Direct beneficiaries
* Access to Finance
* Managing Authority (LUHC),

1. **Scope of Assessment**

The supplier will be expected to undertake a programme evaluation and provide a final summative assessment report together with a summary report in line with the requirements of the ERDF summative assessment guidance and further requirements noted within quotation document. As noted in the timeline (section 14) – a draft report will need to be provided by **15th September 2022**, and the final report by **30th October 2022**.

Primarily, the summative assessment is about understanding the experience of implementing the ERDF project, the impact the project has had, whether it has provided value for money, and the lessons which can be learnt from the experience.

While the approach to collecting information and the type of analysis within each summative assessment may vary depending on the scale and nature of each ERDF project, all assessments need to cover the following themes:

**1.** **Relevance and consistency:** the summative assessments must explore the continued relevance and consistency of the project, in light of any changes in policy or economic circumstances during its delivery period**.**

**2.** **Progress:** the summative assessments will set out the progress of the project against contractual targets, any reasons for under or over performance, and the expected lifetime results

**3.** **Delivery and management:** the summative assessment must explore the experience of implementing and managing the project and any lessons which have emerged from this

**4.** **Impacts:** the summative assessment, where possible, must show the economic impact attributable to the project, including both the intended and actual outcomes and impact

**5.** **Assessing value for money:** the summative assessments must analyse the cost-effectiveness of the project in light of its intended and unintended outcomes and impacts, and hence its value for money.

As noted in ERDF Programme Summative Assessment Guidance ESIF-GN-1-034 – Appendix F, the final summative assessment report will need to cover each of the above themes. From this guidance, IOSVS have listed herewith (Sections 1 – 5) the key areas and questions relevant to our programme together with specific insights which must form part of this assessment.

Suppliers are encouraged to be innovative in their proposals and design of the assessment to reflect the nature of the programme, suggesting any additional insights and added value they may be able to provide.

1. **Summative assessment final report structure**

**Introduction**

This section should provide an overview of the project including timescales, overarching objective(s) and who the main project partner(s) is(are).

It should also outline the research design and evaluation methodology of the summative assessment. The section should elaborate on why a particular methodology was chosen and the research questions used. It should then describe the method(s) used for collecting data and how this data/evidence was analysed against the research questions. The section should also include a critical discussion on how appropriate the evaluation methodology was overall to the particular project and any challenges encountered in the research process.

**Section 1: Project context**

* 1. This section needs to consider the economic and policy context in which the project was designed, including the nature of the market failure, the project objectives and the rationale for the delivery approach. This section should be based around the project logic model and include critical analysis about the appropriateness of the project delivery design given project objectives. This section should be based around the project logic model and include critical analysis about the appropriateness of the project’s design given its objectives.
  2. Drawing on the available evidence, this section should discuss whether there has been a change in this context and whether it has any implications for the practical delivery of the project and the benefits which could be realised for beneficiaries and the local economy as a whole. The key questions that need to be explored here are:

• What was the project seeking to do?

• What was the economic and policy context at the time that the project was designed?

• What were the specific market failures that the project was seeking to address? Was there a strong rationale for the project?

• Was it appropriately designed to achieve its objectives? Was the delivery model appropriate?

• Were the targets set for the project realistic and achievable?

• How did the context change as the project was delivered and did this exert any particular pressures on project delivery?

• Bearing in mind any changes in context or weaknesses in the project design / logic model, can the project reasonably be expected to perform well against its targets?

**Section 2: Project progress**

2.1 This section should consider the progress with the implementation of the project, drawing in particular on annual and lifetime performance against the expenditure, activity and output targets. Variations from the targets should be carefully explained and supported by the available evidence. Progress against any horizontal principals and any explicit targets which were set should also be considered.

2.2 The key questions here are:

• Has the project delivered what it expected to in terms of spend and outputs?

• What are the factors which explain this performance?

• When the project draws to a close, is it expected to have achieved what it set out to?

2.3 As the summative assessment may be conducted prior to the completion of the project, it would be appropriate in these instances to forecast the expected lifetime outturn for the project and the assumptions which underpin the analysis. If this is the case, it is important that there is a clear distinction between the outcomes and impacts which have actually been realised and those which are predicted to arise in future years. For quantitative forecasting, the estimation method will need to be clearly explained.

2.4 This section of the report must include a Spend and Output table (Table F.1) using all of the relevant indicators for the project. This table format must not be adjusted in any way as it forms the basis of the Summary Template (ref ESIF-Form-1-014).

**Section 3: Programme delivery and management**

3.1 This section of the summative assessment will need to provide a more qualitative analysis of the implementation of the project. This should include procurement, selection procedures, delivery performance, governance and management. It needs to consider the elements of project delivery which have gone well and, if necessary, the elements which have gone less well.

3.2 The key questions that the summative assessment will need to explore here include:

• Was the project well managed? Were the right governance and management structures in place and did they operate in the way they were expected to?

• Has the project delivered its intended activities to a high standard?

• Could the delivery of the project have been improved in any way?

• For projects with direct beneficiaries: did the project engage with and select the right beneficiaries? Were the right procedures and criteria in place to ensure the project focused on the right beneficiaries?

• How are project activities perceived by stakeholders and beneficiaries? What are their perceptions of the quality of activities / delivery?

• To what extent have the horizontal principles been integrated into and shaped delivery?

**Section 4: Programme outcomes and impact**

4.1 The analysis here will need to set out the progress that the project has made towards outcomes and impacts set out in the project logic model. It will need to provide an analysis of the gross and net additional economic impacts (see Appendix C). It will be particularly important here to ensure that the analysis provides forecasts of lifetime outturns. This section should also provide conclusions about the contribution that the project has made to any ERDF programme result indicators which are identified as relevant to the project.

4.2 The overarching question that this section will need to explore is whether or not the project has made a difference. In answering this critical question, projects will need to consider:

• What progress has the project made towards achieving the outcome and impacts set out in its logic model?

• To what extent are the changes in relevant impact and outcome indicators attributable to project activities?

• What are the gross and net additional economic, social and environmental benefits of the project (where relevant and applicable to project activities)?

• Can these benefits be quantified and attributed to the project in a statistically robust way?

• To what extent has / will the project contribute to the achievement of ERDF programme result indicators?

• What are the main sources of Strategic Added Value that the project has created?

4.3 The summative assessments should try to use the type standard table format illustrated below for reporting the total aggregate gross and net additional impacts achieved, clearly specifying the time period covered and the impacts areas used. Additional columns and rows can be added for additional impact areas and indicators, as appropriate. A similar format can be used for predicting any expected future impacts if this is appropriate, although the basis for these estimates will need to be clearly stated, including the period over which impacts or outcomes are expected to occur and the reliability of the estimates.

**Section 5: Programme value for money**

5.1 Drawing upon the analysis in the impact assessment section, this section of the summative assessment report will need to provide a clear analysis of the value for money that the project has provided. The summative assessments should also come to a conclusion on whether the project presents good value for money or not. This will need to be benchmarked against other similar interventions if reliable comparable data is available.

5.2 Various methods can be used to assess benefits and costs of an intervention from the perspective of society or government which has helped to fund the activity. The Green Book provides a fuller explanation of these methods.

5.3 As a minimum, summative assessments should provide cost per output analysis. Where appropriate this can also be supplemented by benefit cost ratio analysis to provide additional insight. The value for money analysis should be produced based on multiple cost bases (i.e. total public sector costs, ERDF grant, total project costs) to increase its usefulness for different audiences. The weight that can be placed on the findings relative to the robustness of the approach should also be clear in the summative assessment.

**Section 6: Conclusions and lessons learnt**

6.1 It is difficult to be prescriptive about the content of the conclusions section of the report as these are naturally driven by the characteristics of particular projects, the priorities of grant recipients and the analysis contained within the rest of the summative assessment report. It is suggested that the conclusions are structured around identifying the strengths and weaknesses of the project. They should also highlight specific lessons for the following audiences:

• The grant recipient / project delivery body

• Those designing and implementing similar interventions

• Policy makers

6.2 The conclusions must be objective and constructive and wholly evidenced by the analysis within the summative assessment report. **Approach**

Suppliers are encouraged to propose a range of methods in their quote to evaluate the programme in line with **6. Scope of Assessment** noted above and the ERDF guidance. Methods must be in line with industry recommended best practise for this nature of assessment such as theory-based and/or counterfactual impact evaluation (CIE) or other industry-recognised or innovative methods. Suppliers are expected to include a degree of programme beneficiary interviews and case studies to ensure meaningful and relevant information and conclusions.

Suppliers will need to justify their proposed approaches, being particularly mindful of feasibility. For instance, the scope and timings of the programme may pose challenges to the use of comparison groups. Suppliers should consider whether comparison groups could be identified and how this would be done.

Within the proposal, suppliers will also need to demonstrate that they have taken into account:

* The scope and nature of the programme
* The characteristics and support of local economy
* The timings of the programme and summative assessment deadline and resources

**IOSVS will provide the evaluator with the following information for the formal evaluation**:

* IOSVS application for funding, Funding agreement and details of material changes
* All relevant monitoring and project progress information
* A full list of SME beneficiaries of the project, including details of what business support they received.
* Staff involved with project set up delivery
* Summative Assessment Logic model- complete in the start of the Extension programme
* Summative Assessment Data Monitoring Form – up to date
* Summative Assessment Plan -complete in the start of the Extension programme

1. **Accounts Management**

The supplier relationship will be managed by key members of the IOSVS programme.

Due to the short timescales, the supplier will be expected to provide regular progress updates every 2 weeks with the programme manager. Our preference would be for meetings to be incorporated at key points of the study; this should include initiation meetings in addition to regular progress updates as required.

The supplier should provide a dedicated supplier point of contact to oversee the summative assessment, with overall responsibility for any issues.

The supplier will be expected to provide a project plan and timeline as part of their tender response, outlining roles and any significant requirements from the IOSVS team, in order to initiate the summative assessment as soon as possible.

**10. Quality Assurance**

A minimum standard of quality and consistency must be achieved in line with industry best practise and ERDF summative assessment guidance.

Evaluators must be independent of the programme with appropriate expertise, qualifications and experience, including any subcontractors. Suppliers will need to demonstrate and ensure a professional code of conduct at all times, in particular in communications and surveys with beneficiaries and key stakeholders.

**11. Confidentiality**

Evaluators will be acting on behalf of CIOS and IOSVS as Data Processor and must demonstrate knowledge and adherence to latest Data Protection legislation which includes, crucially, returning and/or deleting personal data when the service ends.

The supplier will need to comply with the requirements of the ERDF summative assessment guidance and the Data Protection Act (and new GDPR 2018 as applicable) in relation to Confidentiality and use of business and personal data. The supplier will be expected to work with IOSVS to ensure compliance with DPA and GDPR. Key considerations the supplier will be expected to incorporate in their approach:

* Are there any constraints on data collection and they can be avoided?
* How will the data be stored and are there any data protection issues?
* Returning and/or deleting personal data when the service ends

Given the different stakeholders that will be interested in the findings of this assessment, the supplier will be expected to provide a method of ensuring anonymization of personal data, potentially providing 2 sets of reports and information, including an executive summary that could be used for different audiences.

**12. Budget**

The budget for the evaluations is up to a maximum of:

* Up to £21 000 plus VAT for IOSVS- Isles of Scilly Voucher Scheme (governed by ERDF Guidance as a fixed percentage of the VS budget).

**13. Contract and Invoice Requirements**

Winning quotation will be awarded through a services contract.

Please see the services contract attached in Appendix 2 to familiarise yourselves with contract & services requirements

**14. Timeline**

The Summative Assessments need to be provided no later than the 31 December 2022. Evaluators must therefore provide their findings and draft summative assessment report to IOSVS by the end of November in accordance with the below schedule. Suppliers are also required to present an interim progress report by the end of September in addition to fortnightly progress updates:

* Initial advert : **Friday 11th March 2022**
* Tender close date: **Monday 28th March 2022 17.30**
* Notification of successful supplier and issue of contract: **Monday 4th April 2022**
* Contract start and Initiation Meeting: Week commencing **4th April 2022**
* Finalisation of methodology: by 3rd May 2022
* Draft report:  **15th September 2022**
* Final Report & Summary - ready for submission to DLUHC: **no later than 30th October 2022**

**15. How to respond to this brief**

Please indicate your interest in the tender by e-mailing the below contact to register your interest and ensure you receive a copy of any additional questions and answers to date.

All tenders for evaluation need to be submitted before **Monday 28th March 2022 17.30** by e-mail with title Tender for Summative Assessment Project Evaluation Services- Council of the Isles of Scilly (CIOS) – Voucher Scheme Programme (VS) to [procurement@scilly.gov.uk](mailto:procurement@scilly.gov.uk)

Please complete the Supplier Questionnaire and provide a Proposal as requested in Annex 1.

Any clarifications requests must be sent in writing by e-mail to the below contact.

**Contact Details: Senior Officer: Capital Development and Procurement**

**Email:** [**procurement@scilly.gov.uk**](mailto:procurement@scilly.gov.uk)

**Cc** [**Milena.Fallows@scilly.gov.uk**](mailto:Milena.Fallows@scilly.gov.uk)

**Address:**

IOS Voucher Scheme

PEC Porthmellon Enterprise Centre

St Mary’s, Isles if Scilly

TR21 0JY

**Suppliers must confirm their expression of interest in this quotation process by e-mailing the above contact to ensure you receive any further information and clarifications.**

# 16. Evaluation process-

Stage 1: Quote proposal stage

* In response to this Invitation to quote document, please complete the Supplier Questionnaire and provide a Quote Proposal as requested in Annex 1.
* Quotation submissions will be scored against the criteria on the next page.
* The contract will be awarded to the Most Economically Advantageous Tender (MEAT) on the basis of quality to price (75:25).

**Scoring**

Qualitative responses will be evaluated according to the following assessment criteria and weightings:

|  |  |  |
| --- | --- | --- |
| **Comment** | **Judgement** | **Marks available** |
| Meets the requirements fully | Excellent | 5 |
| Meets the requirements substantially but not completely | Good | 4 |
| Meets half or more of the requirements but not all. | Satisfactory | 3 |
| Meets some of the requirements but fails to meet more than half | Unsatisfactory | 2 |
| Substantially fails to meet the requirements but meets some or meets some in part | Poor | 1 |
| Does not meet the requirements at all | Failed | 0 |

|  |  |  |
| --- | --- | --- |
| **Criteria & Weightings** | **Score** | **Total Weighting (Max)** |
| **Section A: Supplier questionnaire** | Pass/Fail | N/A - Pass / Fail |
| **Section B** |  |  |
| **Experience, Staff Resources 17.50%** Outline staff experience and previous examples of similar activity. (1 side A4)  **Timescales and Project Management: 17.50%** Provide a detailed project plan necessary to deliver the project on time |  | 35% |
| **Methodology & Approach: 30%** - including Quality and Code of Conduct, Understanding of Context, Relevance to Programme, stakeholder management  **Confidentiality and Use of Personal Data- 10%** (Max 1 side A4), font size 12 |  | 40% |
|  |  |  |
| **Pricing 25%**: \*Price scoring will be based on total price for the contract in comparison to other tendered prices. Scoring will be based on standard relative methodology, whereby the lowest priced bid is divided by the score of the bid being evaluated, multiplied by the maximum weighting.  (Max 1 page, font size 12, excluding separately Excel Pricing spreadsheet) | Score - see notes\* | 25% |
| **Total** |  | 100% |

**Suppliers must adhere to the page limits set as indicated above and within Section B and tenders must be submitted in Font size 12. Any responses beyond the specified page limits will not be taken into account.**

CIOS VS have the right to withdraw from the quotation process at any time prior to signing the contract. CIOS VS will not be liable for any expenses incurred by suppliers during the quotation stage or for attendance of meetings / presentations during the quotation stage.

***(Annex 1 – Section A Supplier Questionnaire and Section B Quotation Proposal below)***

**Section A – Company Information:**

|  |  |
| --- | --- |
| Supplier Questionnaire – Company Information |  |
| 1. Full company name |  |
| 1. Registered Address (and local / branch address where applicable) | Registered Address:  Local address (if applicable): |
| 1. Contact details for this quote (name, role, telephone number and e-mail address) |  |
| 1. Company registration number   (NB CIOS will carry out a risk-based financial check on the company in line with latest procurement guidance. CIOS may request further financial information where required. CIOS may request additional financial information where required such as recent sets of accounts and further information as applicable) |  |
| 1. Date of company formation: |  |
| 1. VAT registration number: |  |
| 1. Public and professional liability insurance: Please provide a copy of your public and professional liability insurance. | Attached: Y/N |
| 1. Acceptance of CIOS Terms and Conditions: - Please confirm acceptance of our Terms and Conditions as attached (Appendix 2). |  |

**Section B**

**1. Staff Resources &Experience-17.5%**

Please confirm ability to meet the resource requirements specified within the brief, including attendance of any progress meetings (face to face and remote meetings where applicable).

Within your response, please detail the proposed staff resources and account management structure dedicated to the contract, confirming the roles and names of all staff involved in the project and any aspects of the service which may be provided or managed by third parties / subcontractors. Suppliers should confirm experience and qualifications of the staff involved in delivering the contract (CVs may be appended), including the project manager and all other staff.

Suppliers should confirm availability and capacity of the team to support the timescales required. *(Max Page Limit below).*

**2. Timescales and Project management: 17.5%**

Please provide a proposed timing and project management plan for the summative assessment to show activities, key milestones, personnel responsible and how you will and work with CIOS VS to undertake the summative assessment within the required timescales. Please confirm how you will ensure successful management of the project and identify any project risks that may impact timescales or assessment. Where possible, please also detail points where significant input is anticipated at this stage from key stakeholders. *(Max Page Limit below).*

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Questions 1 – 2: Max 10 Pages (total 10 pages to cover all 3 questions) - Font Size 12, excluding any CVS which may be appended separately.**

**3. Approach and Methodology -30%**

Please explain your approach and methodology, ensuring your proposal covers each of the areas of the summative assessment report as described in Section 8 – 9 of this brief, including:

* Section 1 - Programme context: Design, Relevancy and consistency
* Section 2 – Programme Progress
* Section 3 – Programme Delivery and Management
* Section 4 – Programme Outcomes and Impact
* Section 5 – Programme value for money
* Section 6 – Conclusions and lessons learnt
* Effectiveness of Processes and Activities
* SME Growth Journey and Engagement
* Lessons for the Future

Within your response, please also address the following areas:

* What methods might be appropriate to attribute change to the programme? What are the advantages and disadvantages of these approaches?
* What are the limitations of the evaluation design and potential caveats to be applied to the findings?
* Please provide a risk assessment for undertaking the evaluation and detail how you will manage the risks.
* Given the time constraints of the assessment, how will your approach measure the outcomes and impacts and timings over which these materialise?
* How will you ensure consistency and quality of data in your approaches?
* What range of data sources are you likely to employ?
* How many enterprises do you anticipate being contacted to ensure an adequate sample?
* Are there any wider direct and indirect impacts that may provide additional insights into the added value of the programme?
* Quality and Code of conduct – Please confirm your commitment to ensuring a professional code of conduct at all times, in particular with regard to communications and surveys with beneficiaries and key stakeholders undertaken by staff and third parties.

Within the response, suppliers must demonstrate understanding of the programme and context and propose relevant and feasible methodology as appropriate.

As noted in the brief, suppliers are encouraged to be innovative in their proposals and design of the assessment to reflect the nature of the programme, suggesting any additional insights and added value they may be able to provide. *(Max Page Limit below).*

**4. Confidentiality, Use of Data and Findings -10%**

Suppliers should provide a response to the requirements listed in Section 12 of the brief in relation to Confidentiality and Use of Personal data. Within your response, please also address the following questions and issues:

* Are there any constraints on data collection and they can be avoided?
* How will the data be stored and are there any data protection issues?
* How will you work with CIOS VS to ensure the requirements of data protection are met, bearing in mind the need for CIOS VS to share certain findings of the summative assessment with different stakeholders?
* Returning and/or deleting personal data when the service ends. *(Max Page Limit below).*

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Questions 4 – 5: Max 12 Pages (total 12 pages to cover both questions) - Font Size 12**

**5. Pricing-25% weighing**

Please provide total costs for provision of the Project Evaluation, including:

* Total cost for undertaking the evaluation and provision of the summative assessment final report and summaryincluding interim reports, progress meetings, expenses and all other costs
* Please provide a detailed breakdown of all costs including:
* Daily rates and number of days for all staff that may be assigned to the contract
* Any third-party costs (if applicable)
* Expenses, travel and any other costs

Please attach a detailed price breakdown in an Excel spreadsheet.

**Please note:**

* Financial pricing sheet and all other cost details must be enclosed in a separate closed & labelled envelope
* The maximum budget for the summative assessment is £22K for IOS VS plus VAT (including all expenses and associated costs) – any bids over this amount will be disqualified.
* Suppliers will be responsible for ensuring costs remain as agreed within their quotation response and final written contract and will need to work within the budget as specified – CIOS will not be liable for any additional costs / expenses unless included in the tender and agreed in writing.

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Question 7: Max 1 Page, Font Size 12, plus separately attached Excel Pricing spreadsheet.**

**Attachments to this document:**

* Appendix 1

ESIF Form 1-014 – Summative Assessment Report Summary

ESIF- Form 1-012 ERDF Summative Assessment Plan Form 1

* Appendix 2 – CIOS Services Contract Terms and Conditions
* Supplier Q&A clarifications and further information may be issued during the tendering period where applicable – all suppliers must register an expression of interest to receive this additional information as per instructions and contact details noted earlier.

*(End of document)*