**Invitation to Tender**

# Business Investment for Growth (BIG) Productivity

**Programme Evaluation and Summative Assessment**

**Cornwall Development Company**

**TEN473**

# 1. About Cornwall Development Company

Cornwall Development Company (CDC) is the economic development service

of Cornwall Council (CC) and is part of the Corserv Group of companies.

On behalf of CC, Cornwall & the Isles of Scilly Local Enterprise Partnership (LEP) and a range of stakeholders, CDC provides a bespoke, business facing service which helps deliver the economic vision and strategy for Cornwall. We achieve this through the expertise and professional commitment of our staff covering a wide range of economic development activities.

# 2. Background and Context

The Cornwall and Isles of Scilly (C&IOS) Growth Programme is the European economic regeneration programme for the region. Running until 2020, it will contribute to the EU ambition to deliver smart, sustainable and inclusive growth.

Under this programme, European Structural Investment Funds (ESIF) and specifically the European Regional Development Fund (ERDF) has been allocated to promote the improvement of the competitiveness of SMEs by increasing the capacity and capability of SMEs and promoting entrepreneurship under Priority Axis 3d:

Supporting the capacity of small and medium sized enterprises to grow in regional, national and international markets and to engage in innovation processes. The support provided through this specific objective will help businesses to develop their internal capability in order to improve their productivity, grow and create jobs.

The rationale for promoting investment in SMEs:

* Of the estimated 5.2 million private sector businesses in the United Kingdom at the start of 2014, 4.6 million (88 per cent) were in England. SMEs make up nearly 99.9 per cent of these businesses.
* In the United Kingdom as whole SMEs are responsible for 60.1 per cent of private sector employment (15.2 million jobs) and 48.6 per cent of private sector turnover at the start of 2014.

However, SMEs face key challenges

* productivity is low compared with large firms
* Growth in SMEs is below potential. While a large proportion of SME employers (68 per cent) say they want to grow in the next two to three years, most will not actually show growth in any given year.

More details on European Structural Investment Funds (ESIF) and the European Regional Development Fund (ERDF) can be found via the links below:

[European Structural Investment Funds](https://www.gov.uk/european-structural-investment-funds)

[European Regional Development Fund](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/682699/European_Regional_Development_Fund_OP_Nov_2017.pdf)

**3. The BIG Productivity programme**

BIG Productivity programme will support the transformation of the Cornish economy through co-investments in long term and sustainable business growth. BIG Productivity will build upon the strengths of the previous BIG and BIG 2 projects, whilst also offering a more targeted and innovative approach towards enhancing the capabilities and growth of local SMEs to raise productivity, collaboration and competitiveness regionally and nationally.

The programme has attracted £4.1M of ERDF funding and was approved in November 2019 and finishes in June 2022 and.

Specifically, the BIG Productivity programme aims to:

* invest in growth projects brought forward by innovative, ambitious and well-managed Cornish based businesses;
* work in collaboration with partner institutions to enable local SMEs gain access to national and global markets;
* provide a targeted advisory service tailored to support service to work across key sectors and support enterprises with potential to grow. The advisory service will allow the recipients to adopt and utilise new technologies much quicker, expand their regional and national coverage and increase their overall productivity.

The main objectives and outputs of BIG Productivity programme are to

• support a total of 175 businesses;

• offer a tailored investment package to meet the needs of new and established Cornish SMEs. The investments will be in the range from £2,500 to £150,000 and be awarded at a maximum of 45% for small size companies and a maximum of 35% for medium size companies. The lower level investments tend to lead to increases in turnover and ongoing investment in future growth. Similarly higher level investments lead to increase in productivity, competitiveness and operations. Approximately 80% of the investments will be capex in nature;

* Disperse £3.15M of grants and attract a minimum of £3.85M of private SME match funding
* create at least 175 new jobs (40 of which are level 4 or above as defined by the Regulated Qualifications Framework (RQF) or the Framework for Higher Education Qualifications (FHEQ)

• provide a non-financial advisory support to 30 businesses to access new markets, improve their processes and thus significantly improve their productivity;

* support the introduction of 30 new to the firm and 10 new to market products.

The BIG Productivity programme is being delivered by a programme manager (part time), 2 business coordinators and an administrator. Further support to this team is provided by CDC’s experienced Programme and Fund Services (PFS) and Finance, Claims & Audit (F&C) teams.

The BIG Productivity team works as part of the SME business support landscape in Cornwall and hence the team works collaboratively with a range of other programmes such as Cornwall Trade and Industry, Community Led Locally Development, Cornwall and Isles of Scilly Investment Fund, Access 2 Finance, Cornwall and the Isles of Scilly Growth Hub, Cornwall Chamber of Commerce and South West Manufacturing Advisory Service as well as several commercial referral partners

BIG Productivity has both a private sector led Investment Panel (which approves all investments of £25,000 and above) and a Steering Group which ensures that the programme remains relevant to the needs of the local business community and provides guidance on decision making and relationships with both the funders and the local business community.

# 4. Tender objectives

CDC is seeking to commission an experienced supplier to undertake a robust assessment of the BIG Productivity programme against its objectives, outputs and outcome targets.

The evaluation will consist of three phases with separate reporting requirements and will require prior experience of evaluating programmes:

* 1. **An interim evaluation** – Completed by 31 July 2020 (draft by 17 July 2020)

The aim of the first interim evaluation is to evaluate the processes involved in delivering the Programme and to create a Summative Assessment Plan by no later than 13 March 2020 – see guidance via link [ERDF Summative Assessment guidance](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/642135/ESIF-GN-1-033_ERDF_Summative_Assessment_Guidance_v1_updated.pdf)

* 1. **A second interim evaluation** – completed by 30 June 2021(draft by 16 June 2021)

The aim of the second interim evaluation is to evaluate the processes involved in delivering the programme and report progress against the Summative Assessment Plan. The second interim evaluation should include the outputs achieved.

* 1. **Final evaluation** – Delivered by 30 June 2022 (draft by 9 June 2022)

The final evaluation should evaluate the achievement of outputs and outcomes of the programme. It should provide evidence for and delivery of the Summative Assessment Report and assess the potential legacy of the programme.

# 5. Tender requirements

The successful tenderer will be expected to undertake the following activities:

**5.1 Interim evaluation I**

The first interim evaluation will primarily be concerned with process and delivery as opposed to programme outcomes although it should evaluate the achievements of the programme outputs to date and identify any emerging added value provided by the programme. The evaluation should examine how productivity is being assessed, measured and captured by the full application process from initial enquiry to claim and output reporting. Additionally, it should also evaluate the effectiveness of the website application process and its integration with CDC’s CRM system in delivering the client’s application process.

5.1.1 Deliverables

1. A Summative Assessment Plan – no later than 13 March 2020
2. An interim report and executive summary. This should include a table outlining programme achievements to date in addition to implications and recommendations for future programme delivery. July 2020

**5.2 Interim evaluation II**

The second interim evaluation will primarily be concerned with delivery and programme outcomes. The aim will be to evaluate the effectiveness of delivery.

* + 1. Consultations with Key Stakeholders**.**

This could include capturing the views of steering and investment group members and other key partners and stakeholders.

* + 1. Consultations with Programme Staff.

We envisage that the evaluators will capture the views of CDC staff, with a particular focus on programme delivery.

* + 1. Beneficiary Feedback.

Although feedback will be gathered and made available as part of the Final Reports there may be a case for collecting more in-depth qualitative information from beneficiaries and we would welcome suggestions as to how best this could be done to minimise research fatigue.

5.2.4 Relevancy and consistency of the programme

This should assess any changes in policy or economic circumstances during its delivery period and appropriateness of programme design

5.2.5 Progress of the programme against contractual targets

This should address any reasons for under / over-performance and expected lifetime results

5.2.6 Assessment of how the programme has been delivered and managed and lessons emerging from this

5.2.7 Initial assessment of the economic impact of the programme

This should include both intended and actual outcomes and impact

5.2.8 Initial assessment of value for money

This should encompass the cost-effectiveness of the programme in light of its intended and unintended outcomes and consequential impact on its value for money.

5.2.9 The work of the Investment and Steering groups

Assess how both groups are contributing to the successful delivery of the programme

5.2.10 Conclusions and lessons learnt

Overall conclusions based on analysis of above areas and should recommend future improvements for the final part of the programme

5.2.11 Deliverables

A second interim report and executive summary by June 2020. This should include a table outlining programme achievement to date in addition to implications and recommendations for future programme delivery.

5.2.12 Methodology for interim evaluations

Cornwall Development Company is open to suggestions as to the best methodology to employ in order to achieve the two interim evaluation objectives as described above. We would also expect to discuss the approach in more depth with the successful tenderer at an inception meeting, to be organised after the award of the contract.

* 1. **Final evaluation Report**

The focus of the final evaluation will be on the overall impact of the programme on its beneficiaries and stakeholders. This will include an assessment of the extent to which the programme has met the output and outcome targets set out in Enclosure 1 as well as an appraisal of the strategic added value of the programme and its impact in relation to the cross-cutting themes. The report should follow the following structure but also include an executive summary with a table outlining programme delivery against both outputs and outcomes and a presentation outlining the key findings, lessons learned and implications for programme legacy.

5.3.1 Section 1: Programme context: Design, Relevancy and consistency

The report will need to consider the economic and policy context in which the programme was designed, including the nature of the market failure, the programme objectives and the rationale for the delivery approach. This section should include critical analysis about the appropriateness of the programme’s design given its objectives.

It should consider whether there has been a change in this context and whether it has any implications for the practical delivery of the programme 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:

1. What was the programme seeking to do?
2. What was the economic and policy context at the time that the programme was designed?
3. What were the specific market failures that the programme was seeking to address? Was there a strong rationale for the programme?
4. Was it appropriately designed to achieve its objectives? Was the delivery model appropriate?
5. Were the targets set for the programme realistic and achievable?
6. How did the context change as the programme was delivered and did this exert any particular pressures on programme delivery?
7. Bearing in mind any changes in context or weaknesses in the programme design / logic model, can the programme reasonably be expected to perform well against its targets?
   * 1. Section 2: Programme progress

This section should consider the progress with the implementation of the programme, 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 (equality and diversity, sustainability etc. as defined by ESIF) and any explicit targets which were set should also be considered.

The key questions here are:

1. Has the programme delivered what it expected to in terms of spend and outputs?
2. What are the factors which explain this performance?
3. When the programme draws to a close, is it expected to have achieved what it set out to?

The summative assessment will need to forecast the expected lifetime outturn for the programme and the assumptions which underpin the analysis. 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 forecasts, the estimation method will need to be clearly explained.

* + 1. Section 3: Programme delivery and management

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

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

1. Was the programme well managed? Were the right governance and management structures in place and did they operate in the way they were expected to?
2. Has the programme delivered its intended activities to a high standard?
3. Could the delivery of the programme have been improved in any way?
4. Did the programme engage with and select the right beneficiaries? Were the right procedures and criteria in place to ensure the programme focused on the right beneficiaries?
5. How are programme activities perceived by stakeholders and beneficiaries? What are their perceptions of the quality of activities / delivery?

f. To what extent have the horizontal principles (e.g. equality & diversity, sustainability etc. as defined by ESIF) been integrated into and shaped delivery?

5.3.4Section 4: Programme outcomes and impact

The analysis here will need to set out the progress that the programme has made towards outcomes and impacts. This section should also provide conclusions about the contribution that the programme has made to any ERDF programme result indicators which are identified as relevant to the programme.

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

1. What progress has the programme made towards achieving the outcome and impacts (both qualitative & quantitative)?
2. To what extent are the changes in relevant impact and outcome indicators attributable to programme activities?
3. What are the additional economic, social and environmental benefits of the programme (where relevant and applicable to programme activities)?

d. What are the main sources of Strategic Added Value that the programme has created?

5.3.5 Section 5: Programme value formoney

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 programme has provided. This may be benchmarked against other similar interventions where appropriate / relevant.

5.3.6 Section 6: Conclusions and lessonslearnt

As per the characteristics and 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 programme. They should also highlight specific lessons for the following audiences:

1. Cornwall Development Company
2. Those designing and implementing similar interventions
3. Policy makers

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

5.3.7 Other Specific Insights required

5.3.7.1 Effectiveness of Processes and Programme Administration

Although the systems utilised were largely at the discretion of BIG Productivity, certain rules include those laid out by the ESIF and MHCLG. We are interested to know if they affected the performance of the Project

1. Processes by which the programme is marketed and promoted.
2. Effectiveness and accuracy of data collection and recording.
3. Steering Group composition - how effective was the Group given its remit and was it reflective of businesses and stakeholders?
4. Clarity of and changes to rules – if applicable, how effectively were these communicated and implemented on the Project?
5. Ineffective or bureaucratic rules – analysis of what rules or procedures were in themselves a barrier to achievement.
6. Support – were BIG Productivity staff readily available to provide advice, guidance and interpretation of rules and procedures?
7. Applicants – how effective were applicants in working with BIG Productivity team including in responding to requests and deadlines?

5.3.7.2 User perception and involvement

This relates to the end-user – the recipient of BIG Productivity investment funding – and their perception not only of the Programme and what they felt it was trying to achieve but also identifying the quality of their submissions. The latter seeks to understand whether the process was perceived as difficult or user friendly based on the way the Programme was designed and the quality of bids put forward by the applicants:

1. Applicants – did the applicant businesses clearly meet the eligibility criteria and were capable of increasing their productivity?
2. Applications – what was the standard of bids from applicants and did they require extra support to meet a minimum standard?
3. Application process – was it perceived as user friendly or a hindrance to awarding investments?
4. Procurement – linked to the above, was the procurement process and guidance clear and did it impede progress?
5. Decision making process – were decisions reached in a timely fashion? In particular, was the opportunity to present applications (those seeking more than £25,000) to the Investment Panel seen as a positive introduction?

5.3.7.3 Outcomes and reach by sector and area

a. Geography – the Programme covers all of Cornwall. How effective was the Programme in its geographical coverage and were the benefits felt evenly across the County?

b. “Reach” of the investments – how effective was the programme in investing in businesses that might not have applied for funding before? Did the programme take action to ensure that its “reach” went beyond those that have sought and secured grants previously?

c. Businesses Sectors – to assess the range of businesses in receipt of investments with a particular focus on the different sectors that benefitted.

5.3.7.4 Lessons for the future

Comment on BIG Programme’s work as well as that of the Investment Panel and Steering Group - recording any innovations that were introduced. For example, if any procedures were simplified to make it easier for participants:

1. Response to suggestions - did the programme evolve and develop as a result of suggestions for improvement from stakeholders and applicants? Was there a culture of continuous improvement?
2. Investment Panel – composition and appropriateness of its membership, frequency of meetings, and record keeping (minutes) for decisions.
3. Presentation of projects – did it help or hinder decision making to have applicants present their programme applications to the Investment Panel and did it benefit and strengthen the businesses in question as a result of the experience?
4. Steering Group – composition of its membership, frequency of meetings and how effectively it “steered” the Programme and gave advice to BIG Productivity team.
5. Structure – was the way that the programme was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?
6. Recording – including accuracy of figures and efficiency of procedures.
7. Reporting procedures – including effectiveness and user friendliness.
8. Help and support – accessibility, readiness and helpfulness of BIG Productivity staff. Did applicants feel that they had a nominated contact at BIG Productivity to speak to when there were queries?
9. Interaction – how effective was the co-ordination between BIG Productivity and other relevant CDC departments
10. Publicity and marketing – assessing achievements, frequency, quality and level of co-ordination.
11. Cross cutting themes – progress made in relation to Equality and Diversity and Sustainability as part of the application process and how this was reflected in the information gathered and reports submitted.

5.3.7.5 Effectiveness of programme administration

Comment on BIG Productivity’s work as well as that of the Investment Panel and Steering Group - recording any innovations that were introduced. For example, if any procedures were simplified to make it easier for participants:

Investment Panel – composition and appropriateness of its membership, frequency of meetings, and record keeping (minutes) for decisions.

1. Presentation of projects – did it help or hinder decision making to have applicants present their programme applications to the Investment Panel and did it benefit and strengthen the businesses in question as a result of the experience?
2. Steering Group – composition of its membership, frequency of meetings and how effectively it “steered” the Programme and gave advice to BIG Productivity
3. Structure – was the way that the Programme was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?
4. Recording – including accuracy of figures and efficiency of procedures.
5. Reporting procedures – including effectiveness and user friendliness.
6. Help and support – accessibility, readiness and helpfulness of BIG Productivity staff. Did applicants feel that they had a nominated contact at BIG Productivity to speak to when there were queries?
7. Interaction – how effective was the co-ordination between BIG Productivity and other relevant CDC department’s publicity and marketing

5.3.7.6 Cross cutting themes

Progress made in relation to Equality and Diversity and Sustainability as part of the application process and how this was reflected in the information gathered and reports submitted.

**5.4 Methodology**

CDC would envisage that the final evaluation would follow a similar approach to that of the interim evaluations, including a desk-based review of existing data, consultations with stakeholders and staff. This report should capture if recommendations from the previous reports have been actioned.

The final evaluation should, however, collect more in-depth information on beneficiary impacts. This could be in the form of feedback questionnaires, surveys or interviews and should include:

1. A review of the process of measuring economic impacts which have taken place during the lifetime of the programme or are anticipated in the future. While a full assessment of the economic impact of the programme will not take place until 2020, we would expect the evaluator to support the collection of economic outcome data from participatory businesses.
2. The collection and analysis of more in-depth data on the impact of the programme on beneficiaries to provide some contextual information around the economic impact analysis. This should include a consideration of strategic added value and any unexpected impacts the programme may have had on the businesses.

**5.5 Adherence to European Regional Development Fund Publicity Guidance**

This programme is partly funded through ERDF and to raise awareness of the opportunities it offers, the European Commission requires all European funded projects to actively promote and publicise that they have received investment and to acknowledge it on any publicity materials or programme documentation relating to the funded activity.

These requirements are set out in formal regulations and failure to comply with them may result in projects having to repay grant. Therefore, any material produced under this contract must comply with the EU Publicity regulations which can be found at this link contained in the ERDF National Publicity Guidelines at Enclosure 2. All material will normally require the use of the ERDF, HM Government, CDC and Big Productivity logo/brand.

**5.6 ERDF Cross-Cutting Themes**

As detailed above, this programme is partly funded through ERDF and Projects qualifying for funding support must incorporate the Cross-Cutting Themes which are essential for the achievement of a well-balanced, sustainable and innovative economy. There are two themes:

* + 1. Sustainability:

Sustainable development is about achieving an appropriate balance between environmental, social and economic objectives. This means a programme needs to demonstrate how any potential negative environmental impacts associated with their programme will be minimised, or mitigated, and how potential positive impacts will be maximised.

* + 1. Equality and diversity:

Equality is about respect and not treating an individual or group of people unfairly. It is about giving people equality of opportunity to access services and to fulfil their potential. Equality is therefore based on the idea of fairness while recognising everyone is different.

Diversity is about all the ways in which people differ and about recognising that differences are a natural part of society. No two people are the same and this means that many different elements make up our local community – something which should be celebrated. Diversity is about treating people as individuals and making them feel respected and valued

See also Corporate Requirements in section 9 below.

**6. Budget**

The total maximum budget available for this commission is £24,000 (exc VAT) but inclusive of all expenses.

**Tenders that exceed the total budget will not be considered.**

The budget will be reviewed as part of the tender evaluation detailed in Section 11 and will reflect the degree to which there is a saving on the maximum budget

# 7. Tender and commission timetable

The timescale of the programme is from the date of signing the contract until the acceptance by CDC of the final evaluation report due June 2022. The anticipated timetable for submission of the Tender, completion of the programme and interim tendering/contract process milestones, are set out below.

|  |  |
| --- | --- |
| **Milestone** | **Date** |
| Publication of ITT | 13/01/2020 |
| Final date for receipt of clarifications | 24/01/2020 |
| Final date for response to clarifications | 31/01/2020 |
| **Deadline to return the Tender to CDC** | **17:00 on 07/02/2020** |
| Evaluation of Tender by CDC - commencement | 10/02/2020 |
| Successful and unsuccessful tenderers notified | 12/02/2020 |
| Programme inception meeting | 14/02/2020 |
| Summative Assessment Plan | 13/03/2020 |
| Draft Interim evaluation I | 17/07/2020 |
| Interim evaluation I | 31/07/2020 |
| Draft Interim evaluation II | 16/06/2021 |
| Interim evaluation II | 30/06/2021 |
| Draft Final evaluation | 09/06/2022 |
| Final evaluation | 30/06/2022 |

# 8. Tender submission requirements

Please include the following information in your Tender submission.

* 1. Covering letter (two sides of A4 maximum) to include:

1. A single point of contact for all contact between the tenderer and CDC during the tender selection process, and for further correspondence.
2. Confirmation that the tenderer has the resources available to meet the requirements outlined in this brief and its timelines
3. Confirmation that the tenderer accepts all the Terms and Conditions of the Contract attached (Enclosure 3)
4. Confirmation that the tenderer will be able to meet the Corporate Requirements (see Section 9) to include confirmation that Equality and Diversity, Environmental and Data Protections policies are in place and, if successful, supporting documentation will be provided as evidence
5. Confirmation that the tenderer holds current valid insurance policies as set out below and, if successful, supporting documentation will be provided as evidence
6. Conflict of interest statement

8.2 Evidence of expertise in evaluating programmes.

8.2.1 Programme Evaluation and Summative Assessment: relevant experience of the staff who would carry out the work based directly on the nature of the work specified within this project

8.2.2 Programme Evaluation and Summative Assessment: three examples of other relevant commissions held by your organisation with contact details of referees, approximate costs and outcomes and details of the similarities between the example and the work being tendered for

8.3 Programme proposal to a methodology outlining how you will approach / deliver the project.

Organisations should prepare a proposal of no more than 20 pages setting out:

1. your understanding of the outlined evaluation requirements, and specific summative assessment guidelines
2. the approach to meet those requirements and guidelines
3. programme risks and mitigations
4. breakdown of research tasks, the number of days allocated to each, who will do them and a timeline
   1. Budget

Provide a breakdown of costs for the following elements:-

1. A **fixed fee** for this work, to exclude VAT but include all travel and other expenses
2. A schedule of day rates for any additional work that may be required

**9. Corporate requirements**

CDC wishes to ensure that its contractors, suppliers and advisers comply with its corporate requirements when facilitating the delivery of its services. It is therefore necessary to ensure that the contractor can evidence their ability to meet these requirements when providing the services under this commission.

All Tender returns must include evidence of the following as pre-requisite if the Tender return is to be considered.

**9.1 Equality and Diversity**

CDC is committed to providing services in a way that promotes equality of opportunity. It is expected that the successful tenderer will be equally committed to equality and diversity in its service provision and will ensure compliance with all anti-discrimination legislation. The tenderer will be required to provide a copy of their Equality and Diversity Policies/Practices if successful in securing this contract.

**9.2 Environmental Policy**

CDC is committed to sustainable development and the promotion of good environmental management. It is expected that the successful tenderer will be committed to a process of improvement with regard to environmental issues. The tenderer will be required to provide a copy of their Environmental Policies/Practices if successful in securing this contract.

**9.3 Indemnity and Insurance**

The contractor must effect and maintain with reputable insurers such policy or policies of insurance as may be necessary to cover the contractor’s obligations and liabilities under this contract, including but not limited to:

* Professional indemnity insurance with a limit of liability of not less than£1 million;
* Public liability insurance with a limit of liability of not less than £2 million;
* Employers liability insurance with a limit if liability of not less than £2 million

All insurances shall cover for any one occurrence or series of occurrences arising out of any one event during the performance of this contract. The tenderer will be required to provide a copy of their insurance policies if successful in securing this contract.

In addition, the contract will be subject to the following legislation.

**9.4 Data Protection**

The contractor will comply with its obligations under Data Protection Legislation (DPL), being the UK Data Protection Legislation and the General Data Protection Regulation (GDPR) and any other directly applicable European Union legislation relating to privacy.

The tenderer will be required to provide a copy of their Data Protection policy and privacy statement if successful in securing this contract.

**9.5 Freedom of Information Legislation**

CDC may be obliged to disclose information provided by bidders in response to this tender under the Freedom of Information Act 2000 and all subordinate legislation made under this Act and the Environmental Information Regulations 2004 (Freedom of Information Legislation). Tenderers should therefore be aware that the information they provide could be disclosed in response to a request under the Freedom of Information Legislation. CDC will proceed on the basis of disclosure unless an appropriate exemption applies. Tenderers should be aware that despite the availability of some exemptions, information may still be disclosed if it is in the public interest.

**9.6 Prevention of Bribery**

Tenderers are hereby notified that CDC is subject to the regulations of the Bribery Act 2010 and therefore has a duty to ensure that all tenderers will comply with applicable laws, regulations, codes and sanctions relating to anti-bribery and anti-corruption including, but not limited to, this legislation.

**9.7 Health and Safety**

The Consultant must at all times comply with the requirements of the Health and Safety at Work Act 1974, the Management of Health and Safety at Work Regulations 1992 and all other statutory and regulatory requirements.

**9.8 Exclusion**

CDC shall exclude the tenderer from participation in this procurement procedure where they have established or are otherwise aware that the organisation, to include administrative, management or supervisory staff that have powers of representation, decision or control of the applicant’s company, has been the subject of a conviction by final judgment of one of the following reasons:

* Participation in a criminal organisation
* Corruption
* Fraud
* Terrorist offences or offences linked to terrorist activities
* Money laundering or terrorist financing
* Child labour and other forms of trafficking in human beings

**9.9 Publicity**

In order to comply with the necessary publicity regulations that accompany ESIF funds all promotional material, meeting invites, questionnaires and reports must at all times comply with the latest guidelines. The Secretary of State has published the National European Structural and Investment Fund Publicity Guidance to assist grant recipients to comply with the Regulations referred to in the paragraph above. The chosen contractor will be required to agree all programme paperwork design with the programme manager at the start of the contract to ensure that the necessary conditions have been met. The appointed contractor must comply with the publicity requirements in all activities, events, and literature developed as part of this contract. The link to the ERDF publicity requirements can be found at Enclosure 2.

**9.10 Sub-contracting**

Tenderers should note that a consortia can submit a tender but the sub-contracting of aspects of this commission after appointment will only be allowed by prior agreement with CDC.

**9.11 Content ownership**

By submitting a tender application, the tenderer acknowledges that the copyright to all material produced during the programme will be the property of CDC.

**9.12 Document Retention**

All documentation (electronic and hard copy) produced as part of this contract will need to be returned to CDC at the end of the contract so that we can retain them for future reference/audit. The contractor will not be expected to store these documents for future reference.

**9.13 Conflicts of Interest**

Tenderers must provide a clear statement with regard to potential conflicts of interests. Therefore, **please confirm within your tender submission** whether, to the best of your knowledge, there is any conflict of interest between your organisation and CDC or its programme team that is likely to influence the outcome of this procurement either directly or indirectly through financial, economic or other personal interest which might be perceived to compromise the impartiality and independence of any party in the context of this procurement procedure.

Receipt of this statement will permit CDC to ensure that, in the event of a conflict of interest being notified or noticed, appropriate steps are taken to ensure that the evaluation of any submission will be undertaken by an independent and impartial panel.

# 10. Tender clarifications

Any clarification queries arising from this Invitation to Tender which may have a bearing on the offer should be raised by email to:

[**Graham.Woodworth@cornwalldevelopmentcompany.co.uk**](mailto:lyn.newby@cornwalldevelopmentcompany.co.uk)in accordance with the Tender and Commission Timetable in section 7.

Responses to clarifications will be anonymised and uploaded by CDC to Contracts Finder and will be viewable to all tenderers.

No representation by way of explanation or otherwise to persons or corporations tendering or desirous of tendering as to the meaning of the tender, contract or other tender documents or as to any other matter or thing to be done under the proposed contract shall bind CDC unless such representation is in writing and duly signed by a Director/Partner of the tenderer. All such correspondence shall be returned with the Tender Documents and shall form part of the contract.

# 11. Tender evaluation methodology

Each Tender will be checked for completeness and compliance with all requirements of the ITT. Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the award criteria.

**Tender returns will be assessed on the basis of the following tender award criteria**

|  |  |
| --- | --- |
| Ref 8.1 Covering Letter |  |
| Acceptable covering letter including confirmation of the requirements detailed at 8.1 | Pass/ Fail |
| Ref 8.2 Track Record | 30 |
| 8.2.1 Programme Evaluation: relevant experience of the staff  8.2.2 Programme Evaluation: examples of other relevant commissions | 15  15 |
| Ref 8.3 Methodology | 50 |
| Programme proposal to a methodology outlining how you will approach and deliver the project. |  |
| Ref 8.4 Budget | 20 |
| A **fixed fee** for this work (exc VAT) including travel and other expenses  The lowest bid will be awarded the full 20 marks. Other bids will be awarded a mark that is proportionate to the level of their bid in comparison to the lowest bid i.e. Marks awarded = 20 x lowest bid / bid |  |

**12. Assessment of the Tender**

The reviewer will award the marks depending upon their assessment of the applicant’s tender submission using the following scoring to assess the response:

|  |  |  |
| --- | --- | --- |
| **Scoring Matrix for Award Criteria** | | |
| Score | Judgement | Interpretation |
| 100% | Excellent | Exceptional demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services. Full evidence provided where required to support the response. |
| 80% | Good | Above average demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services. Majority evidence provided to support the response. |
| 60% | Acceptable | Demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with some evidence to support the response. |
| 40% | Minor Reservations | Some minor reservations of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response. |
| 20% | Serious Reservations | Considerable reservations of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response. |
| 0% | Unacceptable | Does not comply and/or insufficient information provided to demonstrate that there is the ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response. |

During the tender assessment period, CDC reserves the right to seek clarification in writing from the tenderers, to assist it in its consideration of the tender. Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the award criteria weightings in the table above.

CDC is not bound to accept the lowest price or any tender. CDC will not reimburse any expense incurred in preparing tender responses. Any contract award will be conditional on the Contract being approved in accordance with CDC’s internal procedures and CDC being able to proceed.

**13. Tender Award**

Any contract awarded as a result of this tender process will be in accordance with the attached CDC standard terms and conditions (see Enclosure 3).

# 14. Tender returns

Please submit the Tender document by email or post or in person by 17:00 on 07 February 2020.

If submitting electronically, please send by email to

[tenders@cornwalldevelopmentcompany.co.uk](mailto:tenders@cornwalldevelopmentcompany.co.uk) with the following wording in

the subject box: “Tender TEN473 Strictly Confidential BIG Productivity Programme Evaluation and Summative Assessment”

Tenderers are advised to request an acknowledgement of receipt when submitting by email.

If submitting by post or in person, the Tender must be enclosed in a sealed envelope, only marked as follows:

“Tender TEN473 Strictly Confidential BIG Productivity Programme Evaluation

and Summative Assessment”

Nicky Pooley

Head of Corporate Services

Cornwall Development Company Bickford House

Station Road Pool

Redruth

Cornwall TR15 3QG

The envelope should not give any indication to the tenderer’s identity. Marking by the carrier will not disqualify the tender.

# 14. Disclaimer

The issue of this documentation does not commit CDC to award any contract pursuant to the tender process or enter into a contractual relationship with any provider of the service. Nothing in the documentation or in any other communications made between CDC or its agents and any other party, or any part thereof, shall be taken as constituting a contract, agreement or representation between CDC and any other party (save for a formal award of contract made in writing by or on behalf of CDC).

Tenderers must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their tender responses. Information supplied to the tenderers by CDC or any information contained in CDC’s publications is supplied only for general guidance in the preparation of the tender response. Tenderers must satisfy themselves by their own investigations as to the accuracy of any such information and no responsibility is accepted by CDC for any loss or damage of whatever kind and howsoever caused arising from the use by tenderers of such information.

CDC reserves the right to vary or change all or any part of the basis of the procedures for the procurement process at any time or not to proceed with the proposed procurement at all.

Cancellation of the procurement process (at any time) under any circumstances will not render CDC liable for any costs or expenses incurred by tenderers during the procurement process.

# 15. Enclosures

1. Details of BIG Productivity outputs and deliverables
2. ERDF and ESF Branding and Publicity Requirements ESIF-GN-1-005 Version 8 August 2019
3. Terms and Conditions of the Contract