TENDER SPECIFICATION DOCUMENT

**Manufacturing Sector Specialist Advice & Support Services**

**Tender for the supply of Manufacturing sector advice and support services in Greater Lincolnshire**

Date: September 2023

East Midlands Business Ltd

Registered Office:

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Leicester

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# Introduction

* 1. East Midlands Business Ltd (EMB) is a private company which provides a range of business consultancy, research and programme management services to the public sector.
	2. EMB is seeking to procure an adviser to deliver specialist business advice to Manufacturing sector Small and Medium sized Enterprises (SMEs) in Greater Lincolnshire.

# Background

* 1. EMB is contracted by Lincolnshire County Council (LCC) to deliver the Growth Hub advice services under the Business Lincolnshire brand. The Business Lincolnshire programme is part funded by the UK Shared Prosperity Fund and delivered in partnership with various Lincolnshire local authorities. The programme provides support to small and medium sized enterprises (SMEs) located in the Greater Lincolnshire area to help their businesses to thrive and grow. You can find more information on Business Lincolnshire at [www.businesslincolnshire.co.uk](http://www.businesslincolnshire.co.uk)
	2. EMB employs a small team of generalist business advisers which are further supported by specialist advisers for key sectors such as agriculture, the visitor economy, low carbon and energy efficiency or critical subject areas such as digital adoption and marketing.

# Tender Specification

# EMB is seeking to appoint a Manufacturing sector specialist consultant, referred from this point onwards as the ‘Specialist Adviser’, to work alongside our generalist business advisors. The Specialist Adviser will deliver advice and support to manufacturing sector SMEs. The contract is envisaged to start in October 2023 and continue until the end of March 2025.

* 1. The Specialist Adviser will proactively engage SMEs within the Manufacturing sector in the Greater Lincolnshire area on behalf of the Business Lincolnshire Growth Hub.

# The role will include acting as the Account Manager for the manufacturing sector in Greater Lincolnshire, working alongside the existing team of generalist Growth Hub Advisers, to engage with manufacturing sector businesses, identifying those with growth potential and referring them into support and initiatives that will support them in their growth. This support includes programmes such as Made Smarter and GLEAM, Scale-Up, investment readiness, innovation support, exporting support and workforce development.

# The Specialist Adviser will identify and signpost eligible businesses to the wider Manufacturing Programme being delivered on behalf of the Growth Hub. This is an additional programme of support available for manufacturing SMEs to access and includes support delivered both one-to-one as well as via a workshop setting.

# The Manufacturing Sector Specialist role will principally include the following duties:

* Work with colleagues from Lincolnshire County Council to establish baseline data on manufacturers in Greater Lincolnshire and their levels of engagement with business support.
* Work with the Growth Hub Advisers to identify and re-engage with lapsed manufacturers (more than 12 months without contact with Growth Hub initiatives) and new to support manufacturers.
* Support Growth Hub Adviser colleagues that have existing relationships with manufacturing businesses with specialist knowledge and contacts.
* Handle enquiries by phone and email and attend meetings both physically and virtually using technology like Microsoft Teams and Zoom.
* Diagnose issues and opportunities to create a shared Action Plan. Where appropriate, the action plan will include referrals to national and local initiatives such as Made Smarter, Innovate Edge, the Department for Business and Trade Export Academy and ITA support, the Greater Lincolnshire Scale-Up Programme, and GLEAM.
* Provide coaching for manufacturing sector businesses with common issues such as recruitment, skills development, cash flow management, improving productivity, supply chain, and resource efficiency in addition to Lean Manufacturing / Industry 4.0 concepts such as Machine Learning, AR, AI, etc
* Act as the lead contact within the Growth Hub team for Made in Lincolnshire, engaging with existing featured businesses, and encouraging participation from new ones.
* Represent Business Lincolnshire at Manufacturing related events.
* Support Lincolnshire County Council with initiatives such as the bi-annual Manufacturing Conference and other manufacturing related projects, encouraging manufacturing businesses to sign up and take part.
* Support Lincolnshire County Council in the development of Manufacturing sector specific content for the Business Lincolnshire website and for use in the Business Lincolnshire communication channels such as the fortnightly newsletter, social media, etc. In particular, the Specialist Adviser will work with Lincolnshire County Council and a video editing supplier to deliver short online workshops aimed at Manufacturers.
	1. The Specialist Adviser will deliver advice and support to eligible SMEs ensuring that all required forms evidencing the support took place are completed and signed by the client.
	2. The Specialist Adviser will issue an invoice to EMB on a monthly basis for all work completed in any given month. This invoice should be accompanied by a copy of the weekly timesheets for the corresponding month detailing the activities delivered during the month, along with any supporting evidence and paperwork.
	3. All specialist advice services must be delivered under the Business Lincolnshire brand. The supplier’s own brand should not be used when delivering services under this framework contract. Successful suppliers will be asked to comply with some simple brand guidelines.

# Relevant Knowledge and Expertise

4.1. The supplier must have at least three years experience of working with SMEs in an account management or advisory capacity. They will be familiar with up to date manufacturing concepts as well as more traditional manufacturing methods and will have a good understanding of the issues facing SMEs and experience of signposting or referring them to sources of support and funding. Some soft sales skills that facilitate engagement and relationship building would be desirable.

# Key Performance Indicators

* Customer satisfaction with advice and support;
* Timely completion of programme paperwork evidencing support provided;
* Good engagement and team working with the generalist adviser team;
* Attendance at events and activities related to the ambassadorial elements of the role, to raise awareness of Business Lincolnshire and the Support available for Greater Lincolnshire Manufacturers

EMB reserves the right to assign additional output targets for achievement in the delivery of the role following consultation with Lincolnshire County Council, for example.

* New delegates for GLEAM and Made In Lincolnshire
* Successful referrals to manufacturing programmes
* Case Studies
* Content pieces for the Business Lincolnshire website

# Duration of Contract

* 1. The contract will start immediately on award and continue until 31st March 2025 or the available funding is exhausted, whichever occurs first.

#  The successful supplier will be required to attend a brief virtual kick off meeting with EMB and Business Lincolnshire to agree delivery parameters. The meeting will be used to introduce the contractor to the project and answer any questions about the process for delivery of the service required. Further contact will primarily be via email and telephone, with a mixture of virtual and face to face meetings potentially held monthly to discuss progress and performance.

#  Delivery Requirements

* 1. EMB is inviting tenders for from suitably qualified suppliers for the provision of Manufacturing sector advice and support services. Suppliers must be able to demonstrate a proven track record in delivering similar services to small and medium sized manufacturing sector businesses.
	2. Suppliers must be able to deliver throughout the Greater Lincolnshire geographic area. This includes the Local Authority areas of North East Lincolnshire and North Lincolnshire and Rutland, although there may be some geographic restrictions on eligibility for programmes
	3. Suppliers should possess and maintain public and professional indemnity insurance and employer’s liability insurance (if applicable). Evidence of current insurance policies and the limits of these policies must be provided as part of your tender submission.
	4. Suppliers may refer eligible SME clients into the programme, but only on the basis that the referred business will undertake a diagnostic with a Growth Hub Adviser before any specialist support is delivered.
	5. The above specification points are not an exhaustive list. The successful tenderer may therefore be requested to provide additional services. Such services will be agreed between the supplier and EMB.
	6. All specialist advice services must be delivered under the Business Lincolnshire brand. The supplier’s own brand should not be used when delivering services under this framework contract. Successful suppliers will be asked to comply with some simple brand guidelines.
	7. The contractor will be required to complete a weekly timesheet detailing any client activities delivered in any given week. This timesheet will then be used by the project administrator to update Tractivity, the CRM system used by Lincolnshire County Council.

# Payment

* 1. The maximum day rate payable is £300, exclusive of VAT. This is based on the contract being awarded outside the scope of IR35 Regulations. The successful contractor will be subject to the HMRC CEST tool to determine on or off-payroll status. If the successful tenderer is deemed to be on-payroll under IR35 Regulations, the day rate available will be adjusted to account for any Income Tax and National Insurance contributions that EMB is required to pay to HMRC.

# Travel and subsistence expenses will be paid in addition to the day rate at the HMRC agreed rate of £0.45 per mile.

* 1. The total budget for the contract period is £56,875.
	2. Suppliers should provide details of their proposed day rate when submitting their tender response. As per section 8.1 above, the determination of on or off-payroll will be undertaken through the completion of the HMRC CEST tool.
	3. The Manufacturing Sector Adviser will issue an invoice to EMB on a monthly basis for all work completed in any given month. This invoice should be accompanied by a summary of activities delivered during the month, along with any supporting evidence and paperwork.
	4. EMB’s normal payment terms for approved invoices is 30 days.

# Content of Tender Submission

* 1. A template for your response is attached at Appendix A. Potential suppliers are asked to provide the following within their submission:
* Your understanding of the requirements;
* The proposed methodology that you will use to deliver the specialist support and the expected outcomes from that support;
* Details of the key personnel who will be responsible for managing and undertaking the work, including their experience and professional qualifications;
* Copies of full accounts for the last two years;
* Evidence of current insurance policies and value of indemnity (as a minimum this should include public and professional indemnity and employers liability if applicable);
* Evidence of previous work relevant to this contract (including client details, approximate scale of work, and dates / confirmation of delivery);
* Names and contact details of two referees to whom you have provided a similar service in the last three years.
* Evidence of any membership of professional bodies that are relevant to this contract e.g. CIM Chartered Marketer status
	1. Potential Suppliers should note that answering ‘No’ to questions in sections 4-7 inclusively of the template will not preclude your bid from being considered. These are standard questions that we include in all our procurement exercises. If successful, you will be required to supply copies of any certificates for any standards identified in Sections 4 – 7 of the Response Template.

# Evaluation of Tenders

* 1. Tenders will be evaluated by a Panel, which will determine which submission provides most confidence that those suppliers have the relevant experience, personnel and capability to meet the requirement’s objectives.
	2. Scores will be agreed for each response in line with the Scoring Methodology and criteria set out below:

| *Criteria:* | *Assessment / Score:* | *Weighting:* | *Total possible:* |
| --- | --- | --- | --- |
| Tenderers financial stability | Pass / Fail |  |  |
| Understanding of the requirement | 0(unacceptable)-4 (excellent) | 5 | 20 |
| Methodology | 0(unacceptable)-4 (excellent) | 5 | 20 |
| Previous experience | 0(unacceptable)-4 (excellent) | 5 | 20 |
| Personnel | 0(unacceptable)-4 (excellent) | 5 | 20 |
| Price per day for consultancy/advice (max day rate £300) |  |  | 20 |
| Total score available | 100 |

* 1. Scores will be given based on the following assessment of responses:

|  |  |  |
| --- | --- | --- |
| **Score:** | **Assessment:** | **Description of assessment:** |
| 0 | Unacceptable | Nil or inadequate response. Fails to demonstrate an ability to meet the requirement. |
| 1 | Poor | Response is partially relevant and poor. The response addresses some elements of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be fulfilled. |
| 2 | Acceptable | Response is relevant and acceptable. The response addresses a broad understanding of the requirement but may lack details on how the requirement will be fulfilled in certain areas. |
| 3 | Good | Response is relevant and good. The response is sufficiently detailed to demonstrate a good understanding and provides details on how the requirements will be fulfilled. |
| 4 | Excellent | Response is completely relevant and excellent overall. The response is comprehensive, unambiguous and demonstrates a thorough understanding of the requirement and provides details of how the requirement will be met in full. |

# Instruction to Tenderers

* 1. Please submit your full tender submission by 12 noon on Monday 25th Septemberto: **tenders@embltd.co.uk**
	2. Submissions should be titled “**Tender for Manufacturing Sector Specialist Advice Services**”.
	3. Subject to the number of tenders received, tenderers may be invited to give a virtual online presentation which will form part of the final evaluation of the tenders. This would take place week commencing Wednesday 4th October 2023 and tenderers will be notified should they be required to attend and present.
	4. Tenderers should note that in the event that a bid is considered to be fundamentally unacceptable on a key issue, regardless of its other merits, that bid may be rejected.
	5. Tenders submitted after the stipulated time and date advised will be rejected.
	6. If you require further information concerning the tender process, or the nature of the proposed contract, in the first instance please contact tenders@embltd.co.uk with the subject line “*Tender for Manufacturing Sector Specialist Advice Services*”. No questions will be answered that provide a competitive advantage to any party tendering.
	7. Should questions arise during the tendering period, which in our judgment are of material significance, we will post additional information in the Business Lincolnshire section on <https://www.emb-group.co.uk/our-businesses/east-midlands-business/> to explain the nature of the question, and our formal reply. All tenderers should then take that reply into consideration when preparing their own bids, and we will evaluate bids on the assumption that they have done so.

# Conditions of Tender

* 1. Tenderers may contact EMB using the e-mail address tenders@embltd.co.uk to obtain any further information about the requirements of the contract or the tendering procedures if these are not evident or clear from the documents supplied to tenderers.
	2. For the avoidance of doubt, the tender specification document shall include all requirements explicit or implied within the invitation to tender.
	3. EMB reserves the right to withdraw this tender document and all funding contained within it without notice.
	4. No tender will be considered for acceptance if the tenderer has indulged or attempted to indulge in any corrupt practice or canvassed the tender with an officer of EMB. If a tenderer has indulged or attempted to indulge in such practices and the tender is accepted, then grounds shall exist for the termination of the contract and the claiming of damages from the successful tenderers.
	5. It is unlikely that any tender will be accepted which (a) is incomplete or inaccurately or inadequately completed or which purports to impose conditions other than those provided in the contract documents and (b) is delivered out of time or in a manner other than specified in the specification.

# Collusive Tendering

* 1. In submitting a tender against this contract, the tenderer confirms that he has not fixed or adjusted the amount of the tender by or under or in accordance with any agreement or arrangement with any other person.
	2. The tenderer also certifies that at no time, before or following the submission of the tender, has the tenderer carried out any of the following acts:
1. communicating to a person other than the person calling for the tenders the amount or approximate amount of the proposed tender, except where such disclosure is required for the purpose of obtaining insurance;
2. entering into any agreement or arrangement with any person that he shall refrain from tendering or as to the amount of any tender to be submitted;
3. offering or paying or giving or agreeing to give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or having caused to be done in relation to any other tender or proposed tender for the said work any act or thing of the sort described above. The context of this clause the word ‘person’ includes any persons and any body or association, corporate or unincorporated; and ‘any agreement or arrangement’ includes any such transaction, formal or informal, and whether legally binding or not.

# Timetable for Submission

# 14.1 The procurement timetable is as follows:

| **Date** | **Activity** |
| --- | --- |
| Monday 11th September 2023 | Invitation To Tender published |
| Monday 18th September 2023 | Deadline for queries |
| 12 noon on Monday 25th September 2023 | Tender submission deadline |
| 26th September – 28th September 2023 | Panel Tender scoring and review |
| Wednesday 4th October 2023 | Tender presentation meetings (if applicable) |
| Friday 6th October 2023 | Decision on selected supplier(s) and notification to unsuccessful bidders |
| Monday 9th October 2023 | Contract commencement |

* 1. Bidders should note that although the submission date is fixed, the remainder of this timetable may be subject to change.

# Appendix A: Template for Response

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| **Section 1** | **Applicant information** |
| **Question number** | **Question** | **Response** |
| 1.1(a) | Full name of the potential supplier submitting the information |  |
| 1.1(b) – (i) | Registered office address (if applicable) |  |
| 1.1(b) – (ii) | Registered website address (if applicable) |  |
| 1.1(c) | Trading status 1. public limited company
2. limited company
3. limited liability partnership
4. other partnership
5. sole trader
6. third sector
7. other (please specify your trading status)
 |  |
| 1.1(d) | Date of registration in country of origin |  |
| 1.1(e) | Company registration number (if applicable) |  |
| 1.1(h) | Registered VAT number (if applicable) |  |
| 1.1(i) | Are you a Small, Medium or Micro Enterprise (SME)[[1]](#footnote-1)? | **YES** [ ]  **NO** [ ]  |
| 1.1(j) | Details of immediate parent company (if applicable): - Full name of the immediate parent company- Registered office address- Registration number- Head office DUNS number- Head office VAT number(Please enter N/A if not applicable) |  |
| 1.1(k) | Details of ultimate parent company (if applicable):- Full name of the ultimate parent company- Registered office address - Registration number - Head office DUNS number - Head office VAT number(Please enter N/A if not applicable) |  |
| 1.1(l)  | Would the parent company be willing to provide a guarantee if necessary? | **YES** [ ]  **NO** [ ]  |

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| **Section 2** | **Previous experience and contract examples** |
| **2.1** | Please provide details of three different instances where you have provided similar support to that outlined in the specification during the past three years.The named customer contact should be willing to provide written evidence to confirm the accuracy of the information provided below which we reserve the right to verify. |

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| --- | --- | --- | --- |
|  | **Instance 1** | **Instance 2** | **Instance 3** |
| Name of customer organisation |  |  |  |
| Contact person in the organisation |  |  |  |
| Position in the organisation |  |  |  |
| E-mail address |  |  |  |
| Description of support and the impact it had. |  |  |  |
| Support start date |  |  |  |
| Support completion date |  |  |  |

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| **2.2** | If you cannot provide at least one example for question 2.1, in no more than 500 words please provide an explanation for this, e.g. your organisation is a new start-up  |
| **Response:** |  |

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| **Section 3** | **Financial and Economic Standing**Please indicate which of the following you have provided to demonstrate your economic/financial standing: |
| **3.1** | 1. Copies of your full accounts for the last two years
 | **YES** [ ]  **NO** [ ]  |
| 1. A statement of the turnover, Profit and Loss Account/Income Statement, Balance Sheet/Statement of Financial Position and Statement of Cash Flow for the most recent year of trading for this organisation.
 | **YES** [ ]  **NO** [ ]  |
| 1. A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position.
 | **YES** [ ]  **NO** [ ]  |

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| **Section 4** | **Quality** |
| Is your organisation assessed and certified to a recognised Quality Management Standard? (e.g. ISO 9001) | **YES**[ ]  | **NO**[ ]  |
| **If YES, please attach a copy of your current certificate with your submission and go to Section 5** |
| **If NO, please answer the following questions:** | **YES** | **NO** |
| Do you have a written Quality Policy? | [ ]  | [ ]  |
| Do you have a Quality Manual and/or Quality Procedure? | [ ]  | [ ]  |
| Is there a system which ensures control of Documents? | [ ]  | [ ]  |
| Is there a system for controlling non-conforming products? | [ ]  | [ ]  |
| Do you have a system for traceability and maintain records? | [ ]  | [ ]  |
| Do you monitor and audit your suppliers? | [ ]  | [ ]  |
| Is there a system for calibration of inspection, measuring and test equipment? | [ ]  | [ ]  |
| Do you regularly carry out internal audits of your Quality Management System? | [ ]  | [ ]  |
| Do you have a system in place for monitoring/resolving customer complaints? | [ ]  | [ ]  |

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| **Section 5** | **Environmental Management** |
| Is your organisation assessed and certified to a recognised Environmental Management Standard? (e.g. ISO 14001) | **YES**[ ]  | **NO**[ ]  |
| **If YES, please attach a copy of your current certificate with your submission and go to Section 6** |
| **If NO, please answer the following questions:** | **YES** | **NO** |
| Do you have a written Environmental Policy? | [ ]  | [ ]  |
| Have you identified and assessed the main environmental impacts of your business activities? | [ ]  | [ ]  |
| Do you carry out internal environmental audits? | [ ]  | [ ]  |
| Have you ever been prosecuted for breaches of environmental legislation? | [ ]  | [ ]  |
| Do you segregate/recycle any of your waste? | [ ]  | [ ]  |
| Do you have any energy reduction programmes in place? | [ ]  | [ ]  |

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| **Section 6** | **Health & Safety** |
| Is your organisation assessed and certified to a recognised Health & Safety Management Standard? (e.g. OHSAS 18001) | **YES**[ ]  | **NO**[ ]  |
| **If YES, please attach a copy of your current certificate with your submission and go to Section 7** |
| **If NO, please answer the following questions:** | **YES** | **NO** |
| Do you have a written Health & Safety Policy? | [ ]  | [ ]  |
| Do you have a Health and Safety at work management system in place? | [ ]  | [ ]  |
| Do you carry out Risk Assessments of your business activities/processes? | [ ]  | [ ]  |
| Do you regularly carry out internal audits of your Health & Safety Management System? | [ ]  | [ ]  |
| Are there controls in place for visitors and contractors attending your premises? | [ ]  | [ ]  |
| Do you have a system for reporting accidents and near miss incidents? | [ ]  | [ ]  |

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| **Section 7** | **Information Security** |
| Is your organisation assessed and certified to a recognised Information Security Standard? (e.g. ISO27001, Cyber Essentials Plus) | **YES**[ ]  | **NO**[ ]  |
| **If YES, please attach a copy of your current certificate with your submission and go to Section 8** |
| **If NO, please answer the following questions:** | **YES** | **NO** |
| Do you have an Information Management System? | [ ]  | [ ]  |
| Do you utilise an email and web filter? | [ ]  | [ ]  |
| Do you take regular back-ups and store copies off site? | [ ]  | [ ]  |
| Do you have information security systems in place i.e. up-to-date Anti-Virus Software, perimeter firewalls, regular patching of software and computer operating systems? | [ ]  | [ ]  |
| Do you have independent penetration testing of your networks and websites? | [ ]  | [ ]  |
| Have you experienced a cyber attack that has disrupted your business? | [ ]  | [ ]  |
| Do you have staff awareness training in place to raise awareness of cyber security risks? | [ ]  | [ ]  |

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| **Section 8** | **Data Protection** |
| Is your organisation registered with the Information Commissioner’s Office (ICO) under the Data Protection Act? | **YES**[ ]  | **NO**[ ]  |
| **If YES, please provide your registration number and then go to Section 9** |  |
| **If NO, please answer the following questions:** | **YES** | **NO** |
| Do you comply with the Data Protection Act (DPA) 2018? | [ ]  | [ ]  |
| Do you use personal information fairly and lawfully? | [ ]  | [ ]  |
| Do you collect only the information necessary for a specific purpose(s)? | [ ]  | [ ]  |
| Do you ensure it is relevant, accurate and up to date? | [ ]  | [ ]  |
| Do you only hold as much as you need, and only for as long as you need it? | [ ]  | [ ]  |
| Do you allow the subject of the information to see it on request? | [ ]  | [ ]  |
| Has your organisation experienced a data breach that has resulted in the loss or revealing of personal data? | [ ]  | [ ]  |

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| **Section 9** | **Requirement Specific Questions** |
| **9.1** | Please provide details of the key personnel who will be responsible for managing and undertaking the work, including their experience and relevant qualifications. Please identify one named Account Manager who will co-ordinate your services. |
| **Response:** |  |
| **9.2** | Please outline your understanding of our requirements and your proposed methodology for meeting our requirements. Please include details of likely outcomes of the support delivered. |
| **Response:** |  |
| **9.3** | Please provide details of your proposed delivery costs. |
| **Response:** |  |

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| **Section 10** | **Insurances** |
| Do you have Public Liability Insurance? | [ ]  **Yes**  | **Limit: £** | **[ ]  No** |
| Do you have Employers Indemnity Insurance? | [ ]  **Yes**  | **Limit: £** | **[ ]  No** |
| Do you have Product or Professional Indemnity Insurance? | [ ]  **Yes**  | **Limit: £** | **[ ]  No** |
| If yes, please attach evidence with your submission.  |

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| **Section 11** | **Contact Details and Declaration**I declare that to the best of my knowledge the answers submitted and information contained in this document are correct and accurate. I understand that the information will be used in the selection process to assess my organisation’s suitability to be invited to participate further in this procurement. I understand that the authority may reject this submission in its entirety if there is a failure to answer all the relevant questions fully, or if false/misleading information or content is provided in any section.I am aware of the consequences of serious misrepresentation. |
| Contact name: |  |
| Name of organisation: |  |
| Role in organisation: |  |
| Phone number: |  |
| E-mail address: |  |
| Postal address: |  |
| Signature (electronic is acceptable): |  |
| Date: |  |

1. See EU definition of SME <https://ec.europa.eu/growth/smes/business-friendly-environment/sme-definition_en> [↑](#footnote-ref-1)