Cornwall Development Company

Invitation to Tender (ITT)
Peer Network Project for
Cornwall & Isles of Scilly Growth Hub

TEN 520

October 2021

1. About Cornwall Development Company

Cornwall Development Company (CDC) is the arms-length economic development arm of Cornwall Council (CC) and 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.

We deliver economic development expertise for Cornwall Council as our shareholder, a responsive and authoritative service to business and, ultimately, jobs and prosperity and a low carbon future for Cornwall.

2. Background

The Cornwall and Isles of Scilly Growth Hub (CIOSGH) is part of Government's National Growth Hub network and provides a 'one stop shop' service for pre-start, start up and established SMEs to seek bespoke support to foster growth and enhance productivity across Cornwall and the Isles of Scilly (CIOS). It does this by providing a comprehensive support service consisting of;

- Business Connectors- Information, Diagnostic and Brokerage (IDB) service, client account management, support knowledge experts, networking and marketing
- Website- Comprehensive website to provide the 'Hub' and focus for businesses seeking to grow in CIOS, communication of 'Growth Ecosystem' advice on service, provide case studies/PR for client businesses, news, listings, events etc
- Data Management- Reporting, CRM Management, intelligence
- Communications- Comprehensive communications and PR function including marketing, website management and social media delivery to market and showcase service.

This project represents a continuation and enhancement of current activity delivered by the Cornwall and Isles of Scilly Growth Hub (CIOSGH). It reflects the experience of the current CIOSGH project, client feedback and intelligence from other Growth Hubs nationally. The CIOSGH works closely with other business support partners in Cornwall, the private sector support and national support to ensure pre-starts and SME businesses get the support and advice they need to grow.

3. Project Overview

Peer Networks is a national initiative that is delivered locally through the Local Enterprise Partnership (LEP) network and their respective Growth Hubs. The programme's longer-term aims are focused on reducing the UK productivity gap by helping business leaders find practical solutions to strategic and operational challenges. It also forms part of the UK Government response to the COVID-19 pandemic and the UK's exit from the EU, seeking to improve the resilience of SMEs, their capability to adapt their business models to the "new normal" and position themselves for future success, driving longer-term productivity gains.

The programme will see the creation of a series of peer networks (cohorts) through the Growth Hub network, with each group starting with **at least of 11 owners or managers** from the SME business community participating in each network.

Led by an experienced facilitator, these peer networks will typically meet fortnightly as part of delivering 18 hours of action learning through 2-3-hour sessions 3.5 hours of Individual one-to-one support (coaching, mentoring, or advice) will also be provided either directly by the programme, or from other existing schemes to help to implement and manage change.

Active involvement in the peer network will enhance the leadership capabilities, knowledge and confidence of business owners and entrepreneurs within a local region. It will help build regional connectivity and strength within the SME business community.

The Peer Networks Programme is funded by the Department for Business, Energy & Industrial Strategy (BEIS) in response to a commitment made in the 2019 Business Productivity Review. The programme is funded by BEIS through the CIOS LEP.

4. Context and Need

The UK has a longstanding productivity challenge; even before the financial crisis labour productivity was on average 13% higher in the rest of the G7 countries compared to the UK.1 This 'Productivity Gap' has since been exacerbated by the UK's unusually weak productivity growth since the financial crisis in 2007-2008.

The UK's overall future productivity growth will, in large part, be determined by the performance of individual businesses. Whilst the UK has some of the most productive businesses in the world, we also have many low productivity businesses. The current effects of the COVID-19 pandemic combined with the transition into a new trading environment with the EU has the potential to further disrupt UK productivity but also presents an opportunity as businesses adapt their business models, create new ways of working and access new markets.

The 2019 Business Productivity Review found that those businesses that adopt formal management practices are more likely to achieve higher turnover, employment levels and productivity growth. There is a broad base of evidence that suggests that businesses that seek external advice or undertake formal training are more likely to improve their overall business performance.

Whilst there is a large private sector market for advice and training, SMEs report issues with a lack of awareness of the help available and a lack of trust in the quality of provision. Affordability is also a challenge. The Business Productivity Review reported that businesses are most likely to look to trusted peers and professional networks for advice first, often leveraging their networks and existing relationships with intermediaries to signpost and help them to navigate the business support market. The Business Productivity Review found that numerous respondents echoed the complexity, fragmentation and size of the UK business support market and pointed out this complexity is found in both the public and private sector business support provision.

Evidence supplied to the review by the OECD2 supports this previous finding that businesses often prefer to take advice from trusted sources, and they look to their existing networks – such as their peers or their accountants – when taking advice. Businesses also usually take advice at trigger points, such as when faced with challenges requiring change, including both competitive pressures and opportunities.

In addition, there is robust evidence that demonstrates the importance of business managers learning from peers, particularly in their local area. Peer networks are integral for trusted advice. They help businesses navigate multiple stages in the business change cycle, can be called on by businesses time and again, and through structured conversations they can be focused to support the specific issues faced by businesses. The Business Productivity Review references the PLATO Networking programme operational in Belgium. The aim of the PLATO networking scheme is to provide intensive guidance to SME managers by organising structured meetings between SME managers. One study3 found that participation in the scheme was associated with 2.5% higher labour productivity, another study4 found that businesses participating in the network had 5% more assets and 7.4% higher value-added growth.

Building on these findings the UK Government, through the Department for Business, Energy & Industrial Strategy, has committed to strengthen local Peer-to-Peer networks focused on business improvement so that thousands of business leaders can share and benefit from expertise on leadership, business development and technology adoption. Whilst the long-term objective of this initiative is to drive up productivity and help close the gap with our competitors, this is exactly the support businesses need now to develop the skills to tackle issues they face in relation to COVID-19.

The Peer Networks programme is the mechanism through which the funding will be channelled, and peer networks developed and delivered locally through Growth Hubs.

5. Peer Networks and Action Learning

Action learning is an approach to problem solving and learning in groups to bring about change in individuals, teams, organisations and systems. It is based on the principle that the most effective learning takes place in the context in which people are working. A Peer Network is a private group of invited business leaders, formed to support its participants by working together to share challenges, solutions, knowledge, expertise and experience. Typically:

- Participants gather on a regular basis with the support of a facilitator to explore individual participants' challenge and to co-operate by sharing learning from each other's successes, setbacks and practices.
- The point is to realise opportunities, overcome challenges, develop themselves and their businesses.
- The conversation is structured and facilitated using action learning principles to ensure consistency, efficiency and effectiveness, leading to specific actions self-directed by participants.
- Participants reflect on the feedback and discussion and act on new thinking following the session, reporting the results back to their co-members the next time they meet. This helps everyone move forward on their challenges and learn from each other's progress. The fact that participants always report back to the group helps everyone hold each other to account for progressing with their issues and opportunities.
- The process is designed to deliver new insights for participant and result in tangible actions or solutions.

For the Peer Networks programme, participants will benefit from both access to a professional action learning facilitator and one-to-one support outside of the group sessions. Importantly, the content of the sessions is driven by the participants from a list of key themes (e.g. business development, marketing, people management, technology adoption, response to COVID-19, UK's exit from the EU) and can be tailored to focus on their specific needs, including wider issues that may be affecting their sector, locality or business model. Please see Enclosure 2 for details on the 'Architecture' of the programme.

6. Aims and Objectives

Peer Networks will form an important part of the Government's drive to improve productivity and deliver part of the economic response to the effect of COVID-19 on businesses. It will provide support to SMEs as they move into and through the Recovery phase of COVID-19 response. The aim is to improve SME's capability to adapt their business models to the "new normal", position themselves for future success and drive longer term productivity gains through improved leadership and management skills and tech adoption.

The national programme will aim to target 6,000 participants nationally in 2021-22. These will be spread across 38 LEPs in line with local demand and capacity to deliver.

Success will be measured by:

- Firm survival
- Growth in value added as an indicator of recovery from COVID-19
- Improvements in labour productivity
- Participant views on the resilience of their SME
- Participant views on their leadership and management skills
- The SME's ability to recruit and retain staff where appropriate
- The SME's ability to access cash to continue trading
- Changes in the SME's adoption of technology

7. Required Services

Commission;

The CDC via the CIOS Growth & Skills Hub is seeking to appoint providers to deliver key elements of the Peer Network Programme. This is expected to support the growth of at least a specified number of participants and SMEs, through the provisions of cohort groups, across the CIOS LEP area.

CDC will commission up to 12 (twelve) individual cohorts/peer networks (as defined in below). **Applications are invited by those who are seeking to deliver between one and all twelve cohorts**.

The provider(s) will need to clearly demonstrate in their tender response how they will meet the required deliverables within the available budget and timescales.

The programme will be supported by a Playbook – a user handbook to aid the successful roll-out and implementation of the programme (see Enclosure 5). It aims to provide a common resource to support local delivery partners and will help ensure there is a suitable level of national consistency in how the programme is delivered, whilst allowing for a degree of local flexibility as appropriate. The relevant information will be provided to the successful provider(s).

The provider(s) will be required to:

- Detail how they will deliver the programme virtually using video conference technologies
- Detail how they would deliver the programme face-to-face if Covid-19 restrictions permit
- Set out how suitable SMEs will be identified, recruited, and enrolled (providers will be responsible for cohort recruitment- but supported by the CIOSGH)
- Detail how many peer networks will be delivered across the duration of the contract period

- Detail how many participants (SMEs) will be supported across the duration of the contract period
- Set out how they will ensure optimal cohort mix and balance within a group
- Explain how the peer networks will be successfully managed, run and facilitated
- ensure that SME participants are representative businesses within the LEP/Growth Hub area (CIOS)
- Detail how the KPIs (see Enclosure 3 and 6) will be met, how evidence and record keeping requirements will be undertaken, and how the external evaluation process will be supported
- Provide detailed costing associated the service delivery to ensure that the budget is utilised effectively, provides good value for money and a strong economic return

See Section 12 for specific questions of which the above considerations should be included.

Critical to the success of this programme is the use of experienced facilitators deploying an action learning style to drive the peer network and deliver high-impact outcomes. The facilitator(s) should have the skills, experience and qualifications needed to successfully facilitate sessions with small business owners. The provider must be able to clearly demonstrate and evidence a track record in facilitation and show how the facilitator(s) they plan to deploy/meet the facilitator specification provided as part of the tender documentation.

In addition, the provider(s) must be also able to demonstrate the successful delivery of similar support to SME business owners, entrepreneurs, and managers. The provider(s) should be able to demonstrate an excellent understanding of the specific needs, characteristics and issues faced by SMEs with the local region, and a detailed understanding of the range of business issues associated with growth, productivity, innovation, strategy, people and skills, driving change, resilience, technology adoption – and how to address these.

Complementing the delivery of facilitated action learning sessions will be targeted one to one support for individual participants this will add value to the professional and personal growth achieved through the group sessions. This is therefore part of the programme.

One to-one support, which can come in the form of coaching, mentoring or advice, will need to be delivered by suitably qualified and experience individuals to SME business owners or senior leaders. This one-to-one support element will be specific to the individual needs of each participant, so the provision may need to address a wide range of areas across the one-to-one support spectrum. The provider(s) must be able to clearly demonstrate and evidence a track record in one-to-one support and show how the Individuals they plan to deploy meet the specification.

The provider(s) should provide an overview of the experience and skills of those providing one-to-one support, detailing the coaching, mentoring, or advice approaches deployed, what a typical one-to-one session resembles, and how the impact and outcome for the individual and the organisation would be measured in line with KPI and evaluation requirements.

The provider(s) will need to understand the business support landscape within the region to ensure that the service provided will complement and add value to the support currently available within the region to help SMEs.

Providers are expected to provide all platforms, equipment and materials required for the delivery of the programme.

The sessions will run virtually. The wider use of digital technologies to support the efficient, effective and timely administration and delivery of activities is encouraged, and providers are recommended to demonstrate how they can meet this requirement.

Responsibility for the pipeline of clients to the projects lies with the contracted organisation. The CIOS Growth Hub can support marketing activity- but not will not have dedicated resource. Systems should be put in place to monitor and report on the pipeline.

Contractors will also be required to introduce the services of the CIOS Growth and Skills Hub to participants and encourage them to seek a review for further support as required.

8. Delivery Model

The programme invites leaders and senior managers from the SME business community who meet the eligibility criteria below to participate in a local peer network that will meet regularly over several months.

The Peer Networks programme is targeted at companies which meet the criteria of the EU SME definition. Participants must be drawn from businesses that employ staff through PAYE. There is local discretion in recruiting and assembling the SME cohorts, but a preference should be given to SMEs fitting the profile shown below:

Essential criteria:

- In operation for 1 year+
- At least 5 employees*
- An aspiration to improve
- A turnover of at least £100,000

Desirable:

- Businesses that have the potential to scale up
- Businesses who already export, or who have the potential to become an exporter

*For creative industry businesses the minimum number of employees can include Associates.

The business will have a trading address within the CIoS LEP area.

Participants must be senior decision makers and can be drawn from almost any industry sector. The nature of the programme funding allows participants to be drawn from a wider range of organisations than are permitted by many business support programmes including, for example, the visitor economy, social enterprises, construction, hospitality and health and care – allowing engagement with a more diverse range of entrepreneurs, business owners and business leaders.

The provider(s) will need to carefully consider who is recruited to minimise participant drop out.

The provider(s) will be expected to deliver against the playbook. In summary, the delivery model is:

Target cohort size:	**11 business owners or senior decision makers per cohort.**
Number of sessions:	Led by an experienced facilitator using the action learning methodology, the number of sessions will be determined by local needs. **Each cohort must meet for a total of 18 hours**.
Frequency of sessions:	Typically, fortnightly (determined by local needs). **All sessions must be completed by 31 March 2022**.
Location:	Given the ongoing COVID-19 pandemic the sessions will ideally be delivered virtually. Providers can consider face-to-face delivery where there is a demand for this style and guidance allows.
Topic selection:	Topics could include but are not limited to: • Finance • HR • Sales and Marketing • Adjusting to social distancing • Business Model Innovation • Change Management • Embedding formal management processes and systems • Digital (including adoption and implementation of technology, cyber security) • Use of data to drive value in the business • EU transition • Net zero.
Methodology:	Each session must be facilitated according to action learning principals.

Added support:	Individual one-to-one support relevant to identified businesses needs must also be provided. This must be a minimum of 3.5 hours per SME. This support must also be completed by 31 March 2022.

Each of the sessions will be led by an experienced facilitator utilising the action learning methodology. This is a highly effective way of running peer networks and provides a common framework to ensure national consistency across all the local groups. The facilitator will lead and host the sessions (using video conference platforms such as MS Teams, WebEx, Zoom, etc.), and use principles of action learning to successful facilitate each one. Face to face may be possible if local restrictions allow.

Participants whose businesses are dealing with some or all of the following challenges will be particularly well suited to the programme and may benefit the most:

Their business is facing significant challenges or opportunities such as:

- Increased uncertainty and change because of COVID-19, the UK leaving the European Union and Net Zero
- Significant business growth with the need to quickly evaluate new opportunities
- A need to pivot its business model or working practices to remain competitive
- Is looking to find new ways to innovate products and services

Their business wants a more diverse sounding board and will benefit from broader perspectives:

- Their external sources of business advice are limited
- Their business does not currently have a management board
- Their business has a limited management board but does not have any non-executive directors

The participant:

- Has the autonomy to decide to join the programme and the licence to act
- Is interested in developing their leadership and management skills
- Is ambitious for their business
- Already attends less formal networking groups
- Values the opinions of others o Wants to contribute to the success of others

The action learning methodology requires that each participant must own a task, problem, or opportunity that they can present to the set and action within their business. It is also essential that each person takes part voluntarily, makes a commitment to attend all sessions, and to act and learn from the effects of that action. This means they cannot delegate responsibility to a colleague to attend on their behalf.

9. Deliverables

Cohort Mobilisation and Cohort Management

The key deliverable is to support the development and delivery of Peer Networks within the local LEP/Growth Hub area during the contract period using the defined facilitated peer network model and against the specified criteria if the provider is undertaking the recruitment of businesses.

Key regional deliverables for the Peer Networks Programme include (please see Enclosure 3 & 6 for details of metrics):

Management:

- A robust application process for recruiting appropriate businesses/participants
- A robust model for undertaking the 'change in attitudes' survey of businesses supported on the programme
- Meeting programme quality assurance requirements to be set out in a quality assurance framework
- Commitment to undertake monthly reporting, for upload onto a programme microsite for network KPI capture

Engagement:

- Pipeline numbers (including enquiry numbers)
- Number of participants entering the programme
- Number of cohorts built
- Number of participants receiving a minimum of 6 hours facilitation
- Number of participants receiving a minimum of 12 hours facilitation
- Number of participants receiving a minimum of 18 hours facilitation

Results:

- Number of cohorts completing 18 hours of action learning
- Number of individuals completing 18 hours of action learning
- Number of participants who have received a minimum of 3.5 hours one-to-one support through the programme
- Number of participants who have received a minimum of 3.5 hours one-to-one support outside the programme
- Number of participants who have received both – 18 hours of action learning sessions and a minimum of 3.5 hours one-to-one support
- Commitment to report a summary of participant support received, and signposting and referral details

Provision of Facilitators

Key deliverables for the Peer Network Programme include:

- Provision of experienced facilitators with the necessary levels of flexibility and availability that can deliver a minimum of 18 hours action learning facilitation per cohort, pre-cohort participant familiarisation, in-cohort insight gathering and reporting, and post-cohort review and handover activities
- Undertake programme orientation
- Meeting programme quality assurance requirements to be set out in a quality assurance framework to be based on the provider's existing QA processes and procedures; please confirm that as a deliverer that you have existing QA procedures in place.
- Percentage of participants remaining on programme
- Completion of the facilitator notes post session

In addition:

Provision of One-to-One Support

Key deliverables for the Peer Network Programme include:
- Provision of experienced coaches, mentors, or business advisors with the necessary levels of flexibility and availability that can deliver a minimum of 3.5 hours one-to-one support per participant, and provide post support handover
- Undertake programme orientation
- Meeting programme quality assurance requirements to be set out in a quality assurance framework
- Completion of the session/handover documentation

Template Pack

The Peer Network Programme is funded by the Department for Business, Energy and Industrial Strategy, who have produced a series of template documents that you should complete with participants:-

- Peer Network Programme – Participant Charter
    - Each participant must be provided with a copy of this

- Participant Action Card
    - To be completed by each participant at the end of every session

- Facilitators Notes Template
    - Completed by the facilitator after every session
    - The facilitator should use this to capture at a headline level the hot topics of discussion to report to the LEP and note what participants

learned from each other in the sessions and record any other outcomes and what best practice was created following this to help prepare for future sessions

- One-to-One Support Action Plan
    - To be completed with each participant during the One-to-One

- Participant Action Record – One-to-One
    - Summary of the One-to-One Support for the Participant

- Full Programme Dataset Template
    - To capture the Baseline, On-boarding, and Session Feedback

Documents will be provided to you when the signed Grant Award Letter has been returned.

Where you have existing programme forms, they may be used if suitable, but they should be adapted if they do not currently obtain the baseline information requirements for the Peer Networks programme.

It is recommended that you prepare and use a Registration Form for participants. This could include a self-declaration that the participant signs to confirm they meet the programme eligibility criteria. Subsidy declarations will also be required from participants (state aid).

10. Total budget

The budget allocated is a fixed price of £15,000 per cohort, excluding VAT.

For applicants looking to deliver more than one cohort, they should indicate the number of cohorts they are able to deliver in the contract period to 31st March 2022. **If the top scoring tender indicates they will deliver less than 12 cohorts- the next highest scoring tender will be offered the balance of the remaining cohorts until 12 cohorts are contracted out.**

The total value of the project is £180,000 for 12 cohorts.

Tenders should set out the 'blended' hourly rate across the team- *that is the average hourly rate across all team members included in the project* (exclusive of VAT but inclusive of all expenses).

Please split the fixed rate budget of £15k into headings per cohort of;
- Delivery of Cohorts
- Delivery of One to One Support
- Marketing

- Administration
- Co-ordination support
- Other

CDC will commission on a 'per cohort' basis.

Claiming;

Claims can be submitted using the supplied form and will be paid once the reporting information (see Enclosure 3 & 6) for the claim period has been provided.

Payments will be made on achievement milestones to be agreed at inception:-

- Cohort Recruited with Baseline & On-boarding Data provided
- 9 hours of Action Learning Sessions Delivered
  & Monthly Reporting completed
- 18 hours of Action Learning Sessions Delivered, 3.5 hours
  of 1:1, & Monthly Reporting completed

Deliverers will be required to report funds spent under the follow headings;

- Delivery of Cohorts
- Delivery of One to One Support
- Marketing
- Administration
- Co-ordination support
- Other

The total sum available for the provision of the Services is £15,000 **per cohort delivered**. This is subject to the Service Provider successfully providing the services to the Participants and achieving the KPIs as set out in the Metrics Pack during the term of this Agreement. Should the cohorts begin without on-boarding the prescribed minimum 11 participants, the Cornwall Development Company reserves the right to withhold funding.

11. Timescale

The contract will run to 31 March 2022

12. Tender submission requirements and evaluation methodology

Please include the following information in your Tender submission.

Covering letter (two pages maximum) to include:

- Contact name for further correspondence

- That the tenderer has the resources available to meet the requirements outlined in this brief and its timelines
- That the tenderer accepts all the Terms and Conditions of the Contract attached as an Enclosure 7
- Appropriate conflict of interest statement
- That the tenderer will be able to meet the Corporate Requirements below, to include confirmation that Equality and Diversity, Data Protection and Environmental policies are in place and, if successful, supporting documentation will be provided as evidence
- That the tenderer holds current valid insurance policies as set out below and, if successful, supporting documentation will be provided as evidence
- Confirm that you the provider have existing QA procedures and processes in place and if successful, supporting documentation will be provided as evidence
- Confirmation that the tenderer will work collaboratively with other parties appointed by CIOS Growth and Skills Hub

Please provide a document answering the following questions. Please refer to Enclosure 5- The Playbook for more details;

SECTION 1: PROGRAMME MOBILISATION AND PROGRAMME MANAGEMENT

Question 1: Please outline how you would undertake the requirements of the tender brief.

1000 words

Question 2: Please give specific details about your track record of recruiting and selecting participants onto a programme of this nature; and your involvement in this process to ensure a good mix and balance within each cohort.

500 words

Question 3: Please provide details on your capability, knowledge and resource capacity to demonstrate how you meet the requirements of the tender brief.

750 words

Question 4: Please give specific details about:

- your track record in the overall design and delivery of leadership and business growth programmes for the SME audience;
- what innovative approaches you may use in the design and delivery of this programme;
- how you will engage and brief suppliers/associates involved in the delivery of the programme.

750 words

Question 5: Please demonstrate your knowledge, understanding and experience of the local SME business environment and the challenges/opportunities for business growth.

500 words

Question 6: Please provide details of the team that you will use to deliver the services, including the relevant qualifications and experience of the specific staff who will support the activity, including any specific accreditations held (Enclosure 1 provides details).

500 words

Question 7: State your approach to the project management you will use to deliver this contract. Please include reporting of progress and approach to delays or obstacles within your answer.

500 words

SECTION 2: PROVISION OF FACILITATORS

Question 8: Please give specific details about your track record of supporting the development of SME Business Owners through leadership and business growth learning and development approaches and how you will manage the participant learning journey.

500 words

Question 9: Please give specific details about your track record of providing small group facilitation, especially at small/medium business owner levels.

500 words

Question 10: Please give specific details about your approach to action learning and the styles that you use, including your approach to the development of sustainable learning practices.

500 words

Question 11: Please provide details of facilitator(s) who are likely to be involved in this contract. Include any relevant qualifications and/or accreditations held by individuals, including whether they are fully employed or whether they have associate status.

500 words

SECTION 3: PROVISION OF ONE-TO-ONE SUPPORT

Question 12: Please give specific details about your track record of providing one-to-one coaching, mentoring or advice, especially at small/medium business owner levels.

500 words

Question 13: Please give specific details about the types of one-to-one methods and approaches that you use, including your approach to the development of embedded practices.

500 words

Question 14: How do you measure the impact of the one-to-one support you provide?

500 words

Question 15: How will you ensure participants receive high-quality one-to-one support experiences that reflect and draw from current best practice, whilst also accommodating their differing developmental needs, styles and levels of expertise? How will you support their immediate needs whilst helping them to develop independently over the longer term?

500 words

SECTION 4: REFERENCES

Question 16: Please provide details of up to three contracts/projects/assignments you have delivered within the last two years where you have provided similar services to those required by the CDC. These can be drawn from the public or private sector, or voluntary, charity or social enterprise (VCSE) that are relevant to our requirement. VCSEs may include samples of grant-funded work.

At final award stage, CDC may elect to contact any of the organisations for a reference and any references received (or declined) will be considered during the final evaluation. Your permission for CDC to seek a reference from the contacts provided above at any stage during the tender process is assumed. Please provide the following information for each reference

Please include;

Customer Name:

Contact Name:

Direct Telephone Number:

Email Address:

Contract Award Date:

Contract Duration:

Contract Valuation:

Brief Description of Contract (Project): (300 words)

Details of costs to deliver the contract (see section 10) including:

- Total cost (excluding vat) for delivery of the contract
- Details of the blended hourly rate for all staff involved in contract delivery (ie the average hourly rate or all staff working across the project).
- Confirmation of any sub-contractors to the tender and the activity they will carry out and associated costs.

13. Tender process

This tender is being issued through an Open Tender process and therefore we anticipate a significant interest.

14. Tender evaluation methodology

Evaluation of agencies will be selected on the following criteria.

Requirement	Score
Cover letter	Pass/Fail
See 12- Tender Submission Requirements Section 1: Programme mobilisation and programme management questions 1-7.	70
See 12- Tender Submission Requirements Section 2: Provision of facilitators questions 8-11.	40
See 12- Tender Submission Requirements Section 3: Provision of one-to-one support questions 12-15.	40
- See 12- Tender Submission Requirements Section 4: references 3 References/Examples	30

Details of costs to deliver the contract including:
• Total cost (excluding vat) for delivery of the contract split into the following headings;
  ○ Delivery of Cohorts
  ○ Delivery of One to One Support
  ○ Marketing
  ○ Administration
  ○ Co-ordination support
  ○ Other
• Details of the blended hourly rate for all staff involved in contract delivery (i.e. the average hour rate or all staff working across the project).
	20

• Confirmation of any sub-contractors to the tender and the activity they will carry out and associated costs. The lowest blended hourly rate 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	
Maximum available score	**200**

Please note that by submitting a Tender, the applicant must accept the terms and conditions of CDC as outlined in the contract at Enclosure 6

15. Tender timetable

Please submit the Tender document by email by Thursday 21th October 2021.

When submitting by email, tenders should be sent electronically to tenders@cornwalldevelopmentcompany.co.uk with the following message clearly noted in the Subject box;

'Tender 520- Strictly Confidential – CIOS Growth Hub Peer Networks

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

16. Tender assessment

Each Tender will be checked for completeness and compliance with all requirements.

During the evaluation 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 detailed in the criteria 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.

The reviewer will award a percentage of the marks depending upon their assessment of the tenderer's response. The following scoring, or graduations of such, will be used to assess the tenderer's response:

Scoring Matrix for Tender Criteria		
Score	**Judgement**	**Interpretation**
100%	Excellent	Exceptional demonstration of the relevant ability, understanding, experience, skills, and 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, and 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, and 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, and resource and/or quality measures required to provide the goods/works/services, with little or no evidence to support the response.
	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.

17 . 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 Stu Anderson, Growth & Skills Hub Operations Director Manager (stu@ciosgrowthhub.com) as soon as possible and strictly in accordance with the Tender & Commission Timetable below.

Responses to clarifications will be uploaded 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 Contractor. All such correspondence shall be returned with the Tender Documents and shall form part of the contract.

18. Point of contact

Tenderers must provide a single point of contact in their organisation for all contact between the Contractor and CDC during the tender selection process.

19. Tender and commission timetable

The anticipated timetable for submission of the Tender, shortlisted presentations, completion of the project and interim milestones, are set out below.

Milestone	Date
Dispatch of Tender Documents	07/10/2021
Deadline for receipt of clarifications	13/10/2021
Final date for response to clarifications on Contracts Finder	15/10/2021
Deadline to return the Tender to CDC	21/10/2021
Evaluation of Tender by CIOS Growth Hub	22-26/10/2021
Successful tenderer(s) notified	27/10/2021
Project inception meeting	01/11/2021
Project end	31/03/2022

20. 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.

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.

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.

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.

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

a. Professional indemnity insurance with a limit of liability of not less than £2 million;
b. Public liability insurance with a limit of liability of not less than £5 million;

c. Employers liability insurance with a limit if liability of not less than £5 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, this contract is subject to the following legislation.

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.

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.

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.

Conflicts of Interest
Tenderers must provide a clear statement with regard to potential conflicts of interests. Therefore, **please confirm** whether, to the best of your knowledge, there is any conflict of interest between your organisation and CDC or its project 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.

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

Publicity
Deliverers will be required to adhere to the Peer Networks Brand Guidelines (see Enclosure 4)

Sub-contracting
Tenderers should note that the sub-contracting of aspects of this commission after the contract is awarded is not permitted. Any sub-contractors should be clearly identified in the tender, including details of their delivery activity and associated costs.

Content ownership
By submitting a tender application, the tenderer acknowledges that the copyright to all material produced during the project will be the property of CIOS Growth Hub/Cornwall Development Company.

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.

21. 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

Enclosures

Enclosure 1- Peer Network Facilitator Profile & One-to-One Support Provider Profile (see below)

Enclosure 2- Peer Network Architecture (see below)

Enclosure 3- Monitoring and Reporting requirements (see below)

Enclosure 4- Brand Guidelines Document (attachment)

Enclosure 5- Peer Networks Playbook Document (attachment)

Enclosure 6- Peer Networks Metrics Pack (attachment)

Enclosure 7- T & Cs (attachment)

Enclosure 1

Peer Network Facilitator Profile & One-to-One Support Provider Profile

This section provides an ideal profile for a Peer Network Facilitator. It also provides a profile for a Peer Network One-to-One Support Provider where such support is provided directly as part of the programme.

Peer Network Facilitator

The Peer Networks programme will see the creation of series of peer networks in each LEP area, working in partnership with BEIS. Each will harness action learning to gain powerful results for the participants helping them to explore new thinking or opportunities, or find ways to overcome difficulties, or address other challenges.

The role of the facilitator is critical to the successful management and optimisation of an individual peer network – supporting the rapid building of trust and collaborative relationships between participants within the peer group (the cohort), providing strong leadership and direction, and driving the in-session action learning process to deliver tangible actions and solutions for each member of the group.

The facilitator has three main strands of responsibility:

- Management and direction of their individual peer network(s) and its successful facilitation using the principles of action learning
- Individual one-to-one communication with each participant to support reflection and provide signposting to the most appropriate local support
- The capture of Information, data, and insight to help inform contract manager and programme about frequent hot topics for delegates

The role

The main duties of the facilitator are to enable participants to get the most benefit from their cohort experience this should include encouraging participants to:

- Express and discuss their ideas, concerns and understanding of the business situation facing them

- Reflect on and learn from things that did not turn out as expected
- Take responsibility for their own decisions, plans and actions
- Work together to agree both group and personal objectives
- Undertake constructive exploratory discussions within the cohort and avoid conflict.
- Maximise opportunities within their existing business
- Review their progress and identify realistic and practical options to realise their goals
- Connect with other sources of information, advice or further support when appropriate

Working to action learning principles the group facilitator will have the ability to:

- Respect the needs of participants
- Listen and respond effectively and check understanding
- Keep their promises
- Empathise with a range of different feelings and experiences
- Build and maintain an effective relationship with their participants
- Manage group dynamics and deal with conflict
- Generate creative energy within the cohort
- Develop a resourceful state in others
- Handle and respond effectively to change
- Encourage the group to focus on the output
- Shift group and individual perspective
- Evaluate people and processes
- Ensure the people involved retain ownership of the solutions arrived at
- Challenge people to think

The requirements

Facilitation of the peer network;

- Facilitate and host a series of sessions (using video conference) that are inspirational and engaging
- Use the principles of action learning to successful facilitate each session
- Work with participants to develop a collaborative and open culture and supporting behaviours within the peer network cohort
- React and respond to the specific issues presented by participants within the sessions

- Focus the session topics on specific issues as directed by the cohort participants (possible themes and topics provided by BEIS)
- Champion the programme, its benefits and its impact on productivity
- Gather and capture learnings and good/best practice and feedback back insight, share best practice, and identify opportunities for improvements and new initiatives
- Work collaboratively with programme colleagues and other facilitators to ensure high quality service provision

During the course of the programme identify opportunities where participants could benefit from deeper support by referral into the Growth Hub and at the end of the action learning series the facilitator will hold a one-to-one review with each individual participant to help consolidate their experience into potential next steps.

- Undertake a structured one-to-one 'review and next steps' discussion (using video conference) to understand the challenges and opportunities they need to address, and develop a short action plan for follow-on support
- Identify opportunities for further business support and ensure effective signposting, referrals, and connections
- Link clients into further one-to-one support if not already connected (offered by the Peer Networks programme) and/or onto appropriate Growth Hub support, and liaise effectively to support relevant account management activities
- Undertake any necessary handover requirements

Supporting the programme more broadly

- Support relevant stakeholders to promote, engage, and sell the programme and its activities
- Be flexible and responsive to the needs of participants and the programme managers
- Participate in programme-specific training and orientation
- Maintain participant activity records and documents
- Conform with any other relevant contractual requirements, targets, outputs and reporting
- Comply with all aspects of the programme's Quality Assurance Framework
- Support in-programme and post-programme review and evaluation activities

Key skills and qualifications

Facilitators should have a range of competencies, enabling them to demonstrate their individual credibility to businesses in the network. All will have the following attributes:

- Strong facilitation capabilities and toolset – including the use of action learning principles
- Proven facilitation track record built through work performed with small-businesses, entrepreneurs, ambitious business owners and leaders
- Technical skills to run and manage groups virtually using video conference/collaboration tools
- Excellent understanding of the range of business issues associated with growth, productivity, innovation, strategy, people and skills, driving change, resilience, technology adoption
- Good understanding of the specific needs, characteristics and issues faced by SMEs with the local region
- Appreciation of the business/organisational/economic challenges posed by COVID-19

Key characteristics:

Essential

- Optimistic, enthusiastic and self-motivated, with an empathetic approach
- Engaging personal style, energetic personality
- Understanding and appreciation of smaller business – from micros to large SMEs
- Passionate about getting the best out of people, with a genuine interest in supporting others to excel
- Integrity, independence and patience
- Knowledge and application of facilitation methodologies and toolsets – including action learning styles
- Proven track record in high-impact facilitation in the SME space
- Strong interpersonal skills, with a robust but respectful and constructive approach to facilitation
- Able to offer constructive challenge

- Credibility, a strong business acumen, commercial mindset and excellent project management skills
- Able to interact comfortably at owner/MD/CEO/Board level, with great communication, collaboration and storytelling skills
- Flexible approach to solving business problems and the ability to articulate solutions
- High degree of personal ethics, able to understand and reflect LEP/GH/BESI strategy and values
- Ability to rapidly evaluate the needs of participants and suggest appropriate support based on their capacity, ability and motivation
- Practical understanding of the current landscape of publicly funded business support (local and national)
- Strong IT/technical skills, including an understanding of video conference platforms (e.g. Teams/ Zoom/Hangouts), computerised management information systems, diary management, and CRM databases
- Excellent stakeholder management and relationship management abilities

Desirable

- Experience of developing and leading peer-to-peer groups, peer boards, or peer networks
- Experience of operating in senior leadership positions within an SME
- Experience setting up, running, and growing an SME business
- Professional experience of managing and delivering business assessment, advice and development
- Ability to structure, analyse and present complex ideas and data, as well as resolve complex problems
- Relevant qualifications and accreditations

Peer Network One-to-One Support Provider – for the provision of one-to-one support

The Peer Network Programme provides additional one-to-one support for each participant. This begins once the formal peer network set is complete and can utilise highly competent business coaches or mentors, the regional advisor network, or existing local business support programmes.

When provided within the programme the role requires the provision of one-to-one follow-on business-focused coaching/mentoring/support to individual participants through a mixture of consultations and signposting.

The role

The main duties of the One-to-One Support Provider include:

- Analysing the specific difficulties posed to the business by the impact of COVID-19 and what actions should be taken by the SME participant to tackle those issues, in conjunction with their learning from the peer networks
- Agreeing with the SME participant ways to maximise opportunities within their existing business
- Encouraging the SME participant to express and discuss their ideas, concerns and understanding of the business situation facing them
- Supporting the SME participant in creating both business and personal objectives and goals
- Helping the SME participant to review their progress and set realistic and practical options to realise their goals
- Helping the SME participant to reflect on and learn from things that did not turn out as expected
- Signposting the SME participant to other sources of information, advice or further support when appropriate
- Encouraging the SME participant to take responsibility for their own decisions, plans and actions.

The requirements

One-to-one follow-on coaching/mentoring/support

- Work with the participant to understand their strategy, the challenges and opportunities they face, and agree a plan for follow-on advice which will address specific barriers to productivity and growth
- Deliver a series of structured one-to-one sessions (using video conference) to help address the identified challenges and opportunities
- Provide wide-ranging coaching, mentoring, support and direction tailored to individual participants
- Understand the local business support landscape to ensure effective signposting, referrals, and connections

- Refer clients back into (or onto) appropriate LEP/Growth Hub support and liaise effectively to support their account management activities

Supporting the programme more broadly

- Support relevant stakeholders to promote, engage, and sell the programme and its activities
- Be flexible and responsive to the needs of participants and the programme managers
- Participate in programme-specific training and orientation
- Maintain participant activity records and documents
- Conform with any other relevant contractual requirements, targets, outputs and reporting
- Comply with all aspects of the programme's Quality Assurance Framework
- Support in-programme and post-programme review and evaluation activities

Key characteristics:

Essential

- Optimistic, enthusiastic and self-motivated, with an empathetic approach
- Engaging personal style, energetic personality
- Understanding and appreciation of smaller business – from micros to large SMEs
- Passionate about getting the best out of people, with a genuine interest in supporting others to excel
- Integrity, independence and patience
- Knowledge and application of coaching/mentoring/consulting methodologies and toolsets
- Proven track record in high-impact coaching/mentoring/consulting, and SME business advice
- Strong interpersonal skills, able to offer constructive challenge
- Strong influencer, significant experience of coaching/mentoring/advising/supporting others through change
- Credibility, a strong business acumen, commercial mindset and excellent project management skills
- Able to interact comfortably at owner/MD/CEO/Board level, with great communication, collaboration and storytelling skills

- Flexible approach to solving business problems and the ability to articulate solutions
- High degree of personal ethics, able to understand and reflect LEP/GH/BESI strategy and values
- Ability to rapidly evaluate the needs of participants and suggest appropriate support based on their capacity, ability and motivation
- Practical understanding of the current landscape of publicly funded business support (local and national)
- Strong IT/technical skills, including an understanding of video conference platforms (e.g. Teams/ Zoom/Hangouts), computerised management information systems, diary management, and CRM databases
- Excellent stakeholder management and relationship management abilities

Desirable

- Experience of operating in senior leadership positions within an SME
- Experience setting up, running, and growing an SME business
- Professional experience of managing and delivering business assessment, advice and development
- Ability to structure, analyse and present complex ideas and data, as well as resolve complex problems
- Relevant qualifications and accreditations

Enclosure 2

Peer Network architecture

Support Materials
A series of templates have been produced to support the programme. These will be provided to Providers as part of the Playbook and include:

- Model registration form – to include GDPR requirements
- Peer Networks Programme – Participant Charter
- Participant Action Learning Session Record [Action Card]
- Facilitator Notes Template
- One-to-One Support Action Plan
- Participant Action Record – Summary of one-to-one support

Facilitator Onboarding
Facilitator onboarding will be supported by a central introductory webinar, delivered by the GC Business Growth Hub as national programme coordinator. There will be three live webinars scheduled, September and October 2020 (dates to be confirmed). The sessions will be recorded to enable local onboarding when facilitator/cohort starts do not line up with the three live sessions.

The training will assume they are a great facilitator and focus on:
- Programme orientation and standardisation
- Action Learning Methodology – refresher only
- Running virtual sessions – key skills
- Representing a LEP or Growth Hub

Branding
The Peer Networks programme has a distinct brand identity which will be supplied via a Marketing Toolkit of assets as part of the Playbook. Brand Guidelines are provided as part of this toolkit to guide the use of the Peer network logo in relevant existing materials in order to tailor to the provision and for the design of any further local assets, and should be referred to when developing any marketing materials, or content.

Cohort recruitment
Recruitment will be carried out by providers. There will not be any central national marketing campaign driven by BEIS, but BEIS will develop a comms plan to support local messaging at a national level. A series of

common marketing assets have been developed to support recruitment onto the programme. These include:

1. Common presentation slide deck template and content for internal use – with spec/benefits of involvement
2. Common presentation slide deck template for external use
3. Range of social comms assets
4. Overview marketing collateral / flyer / literature for digital and print use
5. Minimum common web content
6. Motion graphic / explainer style video (not geography specific) client-facing animation
7. Facilitator tool kit "Peer pack" including Action Cards

These can be jointly branded with local logos and used to promote and market the programme

In addition, recruitment will be assisted by referrals from the CIoS Growth Hub and via the national Peer Network website. Businesses referred into Providers do not have an automatic place within Cohorts.

Setting up cohorts

Providers will manage this process. Whilst the action learning methodology is designed to allow individuals to learn from others regardless of their business sector and specific experience, it is recommended that consideration is given to the following aspects of the cohort profile:

Sectors: there should be diversity in the structure of the cohorts in terms of types of business as this may generate more to share and will encourage cross sector fertilisation of ideas and knowledge.

Competitors: individuals from competing businesses should not be included in the same cohort due to likely conflict of interests. Whilst confidentiality should be paramount to the running of the set it is inevitable that sensitive information is both presented and discussed. The participating owner/managers will need to be comfortable that the cohort presents a safe environment for them to develop.

Diversity: where possible there should be a balance in terms of gender and all Equalities Act protected characteristic diversity criteria should be considered.

Personalities: the programme does not require formal testing of personality types as the facilitators should be experienced in managing the personalities within the room. However, any existing knowledge of individual personality types should be considered when creating cohorts to ensure they are optimised for team working.

Stage of Growth Journey: consideration should be given to where a company is on its growth journey. Whilst there are opportunities for more mature companies to learn from younger businesses that may be more agile or technologically advanced in an unbalanced group, more mature companies can find they are leant on disproportionately because of their experience. This can be mitigated by ensuring a balanced mix in terms of growth journey or creating cohorts for businesses at a similar stage.

The Peer Network participants' commitment

The Peer Networks programme provides an exciting opportunity to develop the individual skills of business owners and leaders and more broadly advance productivity in the SME community. To ensure maximum impact for the businesses involved – and the funders – participants must be able to commit to attending the full 18 hours of group sessions and access a minimum of 3.5 hours of one-to-one support.

Participants will need to actively engage with the action learning process which requires them to openly explore business opportunities and issues within a group environment and contribute to the success of others.

The Peer Networks programme requires that businesses provide information at entry and exit points.
A copy of the Peer Networks Programme Participant Charter will be provided in the Playbook.

Running a Programme of Virtual Sessions

The ongoing COVID-19 pandemic and its associated social distancing measures requires that the Peer Network programme be delivered via a virtual format initially. It is important to communicate to participants that the virtual format is not inferior – it offers the same benefits as face-to-face peer networks whilst providing efficiencies in terms of time commitment and reduced environmental impact. Research demonstrates that a virtual or audio working environment can bring its own unique benefits to the process. The virtual format can encourage sharpened listening skills, give participants time to reflect in greater depth and develop more advanced virtual leadership skills which are very important in the current business environment.

Technology Platforms

There are several prominent technology platforms that can be used to host a virtual Peer Networks session. As a minimum it is recommended that the chosen platform allows for:

- Flexible licensing to cater for large or small numbers of users
- Hosting for up to 3 hours without any forced break in the service
- Both computer and telephone dial in
- Multiple video streams of users
- Allocation of meeting roles-including 'Host', 'Presenter, and 'Participant'
- Live computer 'Desktop' sharing
- Live and interactive 'Whiteboard' for collaborative visuals and diagrams
- Enabled waiting room or lobby with 'admittance' controlled by the meeting host
- Meeting lock
- Recording functionality
- Live chat or comments stream
- Virtual 'hand raising'
- Security encryption

Platforms that offer the above functionality include:

- MS Teams
- Zoom Meetings
- WebEx
- GoToMeeting
- Google Meet

It is likely that a subscription level service will be required and anticipated that the technology will be hosted and provided by the local delivery provider. Technology provision should be negotiated and confirmed during local procurement activity.

Technology Support

Due to its virtual format the success of the Peer Networks programme is heavily dependent on the functioning of the underlying technology. Whilst the facilitators will be experienced in running online sessions – and the participants likely well versed in the complications of online meetings – stressful situations should be alleviated by developing clear protocols for common scenarios. This also protects the programme brand.

Delivery providers should provide a contact number for an appropriate person outside of the session who can be contacted if the participants or the host experience connectivity problems. This person can inform the host of individual problems or communicate group wide issues as necessary.

Administration and Scheduling

To give participants maximum foresight, all Peer Network sessions for a cohort should be scheduled at the outset with the optimal frequency considered to be fortnightly. Along with the schedule, the participant should be given information about the technology platform that will be used to host the sessions and how to download any necessary software. If not included in the initial schedule, joining instructions for sessions should be circulated no later than 48-hours before each session start.

Except in exceptional circumstances participant attendance should be considered mandatory at all sessions. Making a commitment to attend is central to the action learning ethos and should be encouraged.

One-to-one support can be arranged and scheduled separately as it will reflect the individual business needs and the timing of those.

Resource Requirement

In most instances the facilitator will be managing a virtual room of no more than 11 participants. It is assumed that sessions can be competently run by a single facilitator. Whilst 'set' management can be determined at a local level it should be noted that the introduction of a second facilitator or support person may change the dynamics of the set and the action learning methodology.

Consistency and Standardisation

The facilitator must ensure that each session is run according to action learning principles, using an action learning methodology. The programme assumes that facilitators have experience of the action learning format and will use their experience and great facilitation skills to lead participants on a journey of action, learning and development.

The programme will provide a short training session for facilitators to assist with programme orientation, but it will not teach the action learning methodology.

Flexibility in Session Structure
The facilitator can establish their own session structure for a session providing it adheres to action learning principles. The first session is likely to follow a different format to later sessions as the facilitator will need to establish the ground rules for the set and introduce the action learning format.

Common session elements could include:
- Informal catch up – 15 mins at the start of the session to allow for unstructured chat amongst participants
- Topic selection
- Allocating time
- Main discussion facilitated through action learning mechanisms
- Completing participant action records
- Reviewing overall performance of the cohort, reflecting on how well the group uphold the action learning methodology

Facilitators should use the Facilitator Notes template (Playbook) to keep a record of the issues brought to each meeting, the actions each presenter agrees to take and notes on any process issues occurring in the group

The BEIS Core Topics: a springboard to success
The Business Productivity Review found that one of the contributory factors to the UK's long-standing productivity puzzle was that businesses were not always aware that they suffered from productivity problems. To address the productivity issue as well as tackle other pressures associated with COVID-19 and EU transition, the facilitator will empower the group to decide which session topics they want to focus on that may be hindering productivity and business growth. Typical topics include but are not limited to:

General
- Finance
- HR
- Sales and Marketing
- Business Model Innovation
- Change Management
- Embedding formal management processes and systems
- Digital (including adoption and implementation of technology, cyber security)
- Use of data to drive value in the business

COVID-19
- Adjusting to social distancing and the impact on business, operational and finance models
- Its impact on organisational culture
- Management of staff on/off furlough
- Fear of second lockdown
- Redundancy – emotional, impact on cash and culture

The impact of net-zero carbon emissions on UK business
- Understand what net-zero carbon means
- How to calculate carbon footprints
- Reducing carbon through efficiencies, innovation and behaviour change
- Thinking creatively about carbon reduction activities that can make a difference

EU Transition
- Compliance with trade requirements and tariffs
- Changes in sources of funding
- Staff employment requirements
- Supply chain issues

The sessions should remain participant focused with groups selecting the issues that are most relevant to them. Experienced facilitators will use the high-level topics as springboards to focus on participants specific needs, including wider issues that may be affecting their sector, locality, or business model.

What should be provided to participants?
The programme does not provide a standard 'peer pack' that should be used to onboard participants. If desired, this should be created and disseminated locally. Useful information for delegates might include:
1. Programme introduction and overview
2. Introduction to the action learning methodology
3. The role of the participant – see the Action Learning in Practice section
4. Choosing and presenting a problem – see the Action Learning in Practice section
5. Asking insightful questions – see the Action Learning in Practice section

6. Session review sheet – the Participant Action Learning Session Record (Playbook Pack)

Given the virtual format of the programme paper-based assets should be carefully considered. Digital materials may be more accessible and environmentally friendly than hard copy.

Enclosure 3

Monitoring and Reporting requirements

The Peer Networks programme will run until the end of **March 2022**, with such a short and demanding delivery window it will be important to get the most out of the reporting process so the maximum amount of learning can be derived from the programme. This together with evaluation evidence will provide a sound foundation for future developments.

Data captured on individuals and their businesses will need to be stored by Providers on local CRM systems so the details of these individuals can be made available (exported) for monitoring and evaluation to the CIOSGH- this will include personal data.

Information contained within the national Peer Networks management information site will be accessed by Microsoft Power BI to deliver reporting functionality. The aggregated information will be presented through specific reports, typically this will produce:

- National level data
- South West Peninsula Cluster level data
- Individual LEP/Growth Hub level data
- Supporting narrative

Cohort Providers will be required to submit monthly KPI data to the CIOSGH and will be responsible for entering the data into a specific KPI portal which has been developed. KPIs and reporting for the national programme are highlighted in **Section 9**. Additionally, the following data steps need to be considered.

- Expressions of interest (EOI) submitted via www.peernetworks.co.uk or locally
- Baseline data (business and individual participant level data such as age/ethnicity/gender etc)
- Onboarding questions
- Session feedback and progress monitoring including dropout data.
- Exit survey

GDPR

For the purposes of this programme, suppliers will be required to comply with General Data Protection Regulations (GDPR) (EU) 2016/679 and the Data Protection Act 2018 along with the law relating to these regulations and the processing of Personal Data, this includes:

- Ensuring a Privacy Notice is in place where appropriate in accordance with GDPR
- Not transfer Personal Data outside of the EU unless the prior written consent has been obtained and a range of conditions have been met.

Impact Assessment & Evaluation

The programme will be evaluated by an external provider contracted directly by BEIS.

Cohort Providers will support the evaluation activity programme, ensuring participants complete a detailed survey at the start, midpoint, and end of the programme activity and after each session for local satisfaction monitoring. The survey format will be developed and provided by the evaluation company. It is anticipated that a quality measure will be included in these post-session surveys to identify immediate quality issues raised during programme delivery.

It is the responsibility of the Cohort Provider to ensure that feedback is acted upon in line with their own quality assurance processes.

Cohort Providers will keep a record of attendance at each network session.

The Cohort Provider will use the 'Facilitator Notes Template' to be provided in the Playbook to capture at a headline level the hot topics of discussion to report to the CIOSGH and note what participants learned from each other in the sessions and record any other outcomes and what best practice was created following this to help prepare for future sessions.

Observation

The action learning methodology is central to the integrity of the Peer Networks programme. Methods to monitor session quality must be established to ensure programme objectives are realised.
Providers are asked to organise recording of one virtual session per cohort to be reviewed by the CIOSGH observer offline. The purpose of the recording should be explained and detail what will happen with the

recording post-observation, to be deleted once reviewed, or one any feedback has been given to the facilitator about their performance.

Observation for the purpose of quality and training should be stated within local terms and conditions between the Providers and participants. Summary of baseline survey data collection topics.

The following are examples of the topic areas that may be asked about at baseline for evaluation purposes. These may be subject to change following prioritisation and input from the evaluation contractor.

Adapting to the economic impacts of COVID-19/other economic shocks

A key objective of the programme, since it has been repurposed for COVID-19, has been to enable businesses to adapt to the impacts of COVID-19. This involves both mitigating the negative impacts of the economic situation and exploiting any relevant opportunities, so we would like to measure whether the programme encourages businesses to do either.

Resilience

A key objective of the programme is to increase SME resilience. We will define resilience in line with the ERC definition: 'Resilience is a strategic objective intended to help an organisation survive and prosper. A highly resilient organisation is more adaptive, competitive, agile and robust than less resilient organisations and rebounds from adversity strengthened and more resourceful'. Questions will be based on the literature which includes an ERC literature review.

Leadership and management

This is one area that may be covered in Action Learning Sets, and therefore we would want to measure whether it has been improved by the programme. Leadership and management may be a priority topic, given the importance of management practices to firm-level productivity, as indicated by the Business Productivity Review. Questions to measure this are likely to be based on those in the Management and Expectations Survey (ONS).

Recruitment and retention of staff/HR

This is a topic that may be covered by Action Learning Sets, and therefore we would want to measure whether the programme has improved participants' abilities or intentions in this area.

Technology adoption

This is a topic that may be covered by Action Learning Sets, is considered to be important for productivity, and may have had an important role in adaptation to the impacts of COVID-19. Therefore, we would want to measure whether the programme has improved capability or influenced intentions in this area.

Networks

One of the programme objectives was to meet a latent demand from SMEs for high-quality peer networks. The programme is also targeting increased awareness of and engagement with business networks, and maintenance of the network after the programme.

We would aim to baseline business awareness of and engagement with networks, to determine whether the programme has had a role in changing this.

Growth ambition

This forms a good shorter-term proxy measure for growth and productivity, so we may wish to measure it to have an indicator of whether the programme will impact on these areas.

Business planning

This is a good indicator of business performance in the near future, so another potential proxy measure of growth and productivity. It also may be covered by the Action Learning Sets.

Use of data

This is a topic that may be covered by Action Learning Sets, and therefore we would want to measure whether the programme has improved participants' abilities in this area.

Change management

This is a topic that may be covered by Action Learning Sets, and therefore we would want to measure whether the programme has improved participants' abilities in this area.

Innovation
This may be an area to be targeted by the programme. It is connected to both the shorter-term objective of responding to the impacts of COVID-19 and the longer-term objective of eventually improving firm-level productivity.

Business confidence
COVID-19 has had a significant impact on business performance and the confidence of business leaders to date.

In providing immediate support to some or all of the above areas, the programme may improve overall business confidence, so we would capture this by measuring confidence at baseline and after the programme.