



## Invitation to Tender – Summative Assessment & Legacy Summary of Access to Finance

### Annexe 1 – Supplier Questionnaire and Tender Proposal

#### Section A – Company Information:

| Supplier Questionnaire – Company Information  |   |
|---|---|
| 1. Full company name  |   |
| 2. Registered Address (and local / branch address where applicable)   | Registered Address:<br><br>Local address (if applicable): |
| 3. Contact details for this tender (name, role, telephone number and e-mail address)  |   |
| 4. Company registration number<br>(NB OIAS will carry out a risk-based financial check on the company in line with latest procurement legislation guidance. OIA may request further financial information where required) |   |
| 5. Date of company formation:   |   |
| 6. VAT registration number:   |   |
| 7. Public and product liability insurance: Please provide a copy of your public and product liability insurance.  | Attached: Y/N   |
| 8. Acceptance of OIS Terms and Conditions: Please confirm acceptance of our Terms and Conditions as attached (Appendix 2).  |   |



## **Section B - Tender Proposal**

### **1. Experience**

Please provide details of your previous experience of similar project evaluations or summative assessments. At least 3 detailed examples should be included with the tender. Please provide as much detail as possible including value of projects, contact details for potential references, dates and description of the contract and project where possible (*Max Page Limit below*).

### **2. Staff Resources**

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

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

Suppliers should confirm availability and capacity of the team to support the timescales required, particularly where suppliers are tendering for both this programme and the CBS programme evaluation. (*Max Page Limit below*).

### **3. Timescales and Project management:**

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

### **MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

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



#### 4. Approach and Methodology

Please explain your approach and methodology, ensuring your proposal covers each of the themes of the summative assessment report and additional objectives as described within the brief, including:

- Introduction
- Section 1 – Project context
- Section 2 – Project Progress
- Section 3 – Project Delivery and Management
- Section 4 – Project Outcomes and Impact
- Section 5 – Project value for money
- Section 6 – Conclusions and lessons learnt
- Specific Insights:
  - Effectiveness of Processes and Activities
  - SME Growth Journey and Engagement
  - Lessons for the Future
- Legacy Summary documentation

Within your response, please also address the following areas:

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

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

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



## 5. Confidentiality, Use of Data and Findings

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

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

### **MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

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

## 6. Added Value

Suppliers should list any other added value they can provide as part of the contract and unique selling points and services they may be able to provide.

Additional, creative pieces to deliver Legacy summary, detailing and highlighting the achievements and impact of the project, in a less formalised evaluation for various current and potential future stakeholders.

### **MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Question 6: Max 5 Pages, Font Size 12**

## 7. Pricing

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

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

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Please attach a detailed price breakdown in an Excel spreadsheet.

Please note:

- The maximum budget for the summative assessment is £25,000 plus VAT (including all expenses and associated costs) – any bids over this amount will be disqualified.
- Suppliers will be responsible for ensuring costs remain as agreed within their tender response and final written contract and will need to work within the budget as specified – OIA will not be liable for any additional costs / expenses unless included in the tender and agreed in writing.

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

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

*(End of document)*