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| CONTRACT TITLE | European Regional Development Fund (ERDF) Summative Assessment – Sustainable Supply Chain (SSC) Project, trading as The Supply Chain Network (TSCN) |
| CONTRACT PERIOD | March 2023 – May 2023 |
| DEADLINE FOR SUBMISSION | **5PM 27/3/2023** |

**REQUEST FOR QUOTATION**

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1. GENERAL

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| --- | --- |
| CONTRACT TITLE | ERDF Summative Assessment – SSC Project trading as TSCN |
| CONTRACT PERIOD | 22/3/2023 – 31/5/2023 |

* 1. You are invited to submit a competitive Quotation for the contract detailed above.
  2. It is essential to observe and comply with the following instructions in the preparation and submission of your Quotation. We reserve the right to reject a Quotation that does not fully comply with these instructions.
  3. Notwithstanding the fact that we have invited you to quote for the Contract or included you on any list of selected Economic Operators, we make no representations regarding your financial stability, technical competence or ability in any way to carry out the Contract.
  4. The Quotation must be completed in English.
  5. Terminology: Within the quotation documents “We, Our, Us” etc. refers to the Council. “You, Your” etc. refers to the Economic Operator.

1. SPECIFICATION / OVERVIEW OF REQUIREMENT
   1. **Introduction**
      1. East Riding of Yorkshire Council wish to commission a Summative Assessment of the Sustainable Supply Chain (SSC) project, to assess the impact the project has had, and identify lessons which can be learnt. The SSC project has received funding from the England European Regional Development Fund (ERDF) Programme 2019 to 2023, and assessment methods used must comply with the programme guidance[[1]](#footnote-1).

The Operational Programme recognised that there is an opportunity to use supply chains to build SME capacity and reputation and improve access to new markets. This proposal intended to use a tried and tested methodology, which has been highly successful in driving SME engagement and local supply chain growth in the offshore wind and wider renewables supply chain within Hull and East Riding through the Regional Growth Fund supported ‘Green Port Growth’ Business Support strand, and apply this model to the priority sectors for the YNYER LEP area, i.e. food manufacturing, agri-tech and bio-renewables and the supply chains of regional significance existing alongside these specialist sectors, including energy and construction. The Green Port Growth model, which had supported local SME’s to achieve in excess of £210m worth of supply chain contracts over the last 5 years, delivered all elements of activity identified within the call specification local priorities, and had experience of working closely with the Growth Hubs and other manufacturing support programmes to avoid duplication and ensure SMEs were directed to the most appropriate provider of support for their specific needs.

* + 1. The Sustainable Supply Chain (SSC) project will assist SMEs within the York, North Yorkshire and East Riding LEP area to enhance their competitiveness by:

• Identifying and strengthening knowledge and intelligence of supply chain opportunities, standards and specifications across the region; and

• Identifying, informing and supporting regional businesses to be supply chain ready to access opportunities.

The SSC will offer a combination of information, advice and specialist support to help regional SMEs enhance their competitiveness by recognising and embracing potential opportunities and win as much potential supply chain spend as possible, supporting work to be retained in the local economy.

* + 1. The project has been led, managed and administered by East Riding of Yorkshire Council and delivered by a range of partners ensuring delivery across the YNYER LEP area. The partners are York, North Yorkshire and East Riding Local Enterprise Partnership Growth Hub, Hambleton District Council, and Richmondshire District Council.

The project’s aims in more detail are:

* Making Opportunities Visible: by fully engaging and stimulating the business community by providing them with clear and detailed visibility of both direct and indirect future opportunities and prospects open to the region in a timely manner.
* Making Opportunities Accessible: by enabling businesses from relevant sectors to undergo mentoring, training and intervention support to develop accredited systems, facilities and management capabilities and where appropriate to gain “approved supplier status”. This will include identification of supply chain requirements, identification of e-tendering and e-commerce requirements, identification of financial performance requirements, and acquiring accredited management systems in areas such as quality, environment and health and safety.
* Making Opportunities Winnable: by providing a range of business support to enable businesses to develop strategic plans including the formation of consortium/collaborative teams with other approved suppliers to successfully win and deliver contracts. This aspect will help develop customer facing skills and systems, develop the business management environment and capabilities to develop consortiums etc. It will include sales and marketing development, presentation/bid writing and project management development.
* Enabling Business Growth: by health checking businesses for signs of stagnation and assist/mentor individual business owners/management teams to create bespoke interventions to remove hidden barriers to growth and stimulate business prosperity. Specifically, support will help identify hidden barriers to growth, change the culture and confidence in the business area, identify the businesses’ vision, goals and plans, improve leadership and management, improve business systems and infrastructure, and raise awareness of how to access finance and other appropriate support.

Specific activities:

1. Promotion and development of a Supplier Directory, incorporating identification of key supply chain opportunities through mapping
2. Access to market intelligence / ongoing information on supply chain opportunities – through sector news roundup, e-mail alerts etc.
3. Registration – Information, Diagnostic and Brokerage Support
4. Full Company Review
5. Access to Workshops / Events Programme
6. Access to Grants / Financial Assistance

The scheme is expected to support a minimum of 120 SMEs, including 2 new enterprises, lever in £337,500 private sector investment and support the creation of 50 new jobs.

The project will ultimately enable businesses in the region to:

• Increase productivity

• Increase efficiency

• Grow sales

• Access new markets

• Develop new products and services

• Increase employment

• Become more resilient

• Be more innovative

**3 Contract Requirements**

3.1.1 The supplier will be expected to undertake a programme evaluation and provide a final Summative Assessment report together with a summary in line with the requirements of the ERDF Summative Assessment guidance.

<https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/896857/ESIF-GN-1-033_ERDF_Summative_Assessment_Guidance_v4.pdf>

As noted in the milestones, a draft report will need to be provided by 8th of May 2023, and the final report by 31st of May 2023.

The supplier will undertake the following work:

1. Review the Sustainable Supply Chain logic model.

2. Undertake an Assessment that meets the requirements of the England European Regional Development Fund Programme 2019 to 2023 which covers the following themes:

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

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

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

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

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

3. Data collection, analysis and reporting on the evidence for the project’s required ERDF programme outputs around the support provided to businesses.

3.1.2 Suppliers are encouraged to propose a range of methods in their tender to evaluate the programme in line with Scope of works noted above and the ERDF guidance. The supplier must engage with the project team and stakeholders. The supplier should allow for:

• 1 x Project Initiation meeting with the project team

• 1 x Assessment Review meeting on submission of the draft report

• Other meetings/consultations/site visits required to meet the duties of the contract.

3.1.3 The supplier is encouraged to meet with project stakeholders and deliverers.

All printed materials must comply with European Regional Development Fund and European Social Fund Branding and Publicity Requirements[[2]](#footnote-2)

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

The supplier will need to comply with the requirements of the ERDF Summative Assessment guidance and the Data Protection Act (and GDPR 2018 as applicable) in relation to Confidentiality and use of business and personal data. The supplier will be expected to work with the council to ensure compliance with GDPR.

1. Required Outputs

4.1.1 The supplier should deliver the following outputs:

* An agreed Assessment Plan
* Draft report, supplied in a digital format for approval
* Final report, 2 paper copies and a digital copy

**5 Timescales**

|  |  |
| --- | --- |
| **Milestones** |  |
| Understanding the project brief and review of logic model | March 2023 |
| Assessment Plan agreed by project manager | March 2023 |
| Data collection | April 2023 |
| Draft report | 8th May 2023 |
| Final report | 31st May 2023 |

**6 Management of the Contract**

The contract will be managed by the following key stakeholders:

|  |  |
| --- | --- |
| **Key stakeholders** | **Activity** |
| Katheryn Gregory | Project Manager |
|  |  |

7 QUOTATION

7.1 Bidders must submit answers to the questions stated in 3.2 (a), which must be no more than 5 pages A4 in length), detailing how you would deliver the project and providing evidence of relevant skills, knowledge and experience. At least three relevant references must also be provided.

7.2 Please submit answers to the questions below to quote for this piece of work. Please note that each sub-question for question 2 is equally weighted.

1. **Method Statements**
2. **SKILLS AND RELEVANT EXPERIENCE (40%)**
   1. **Please provide details of the relevant expertise, experience and qualifications of the person or persons you propose to work on this project that will be responsible for the undertaking the project activities**
3. **TECHNICAL MERIT (60%)**
   1. **Please provide an outline structure of the Assessment Plan**
   2. **Please provide details of your approach to identifying what data is going to be collected, how it is going to be collected and how it going to be analysed**
   3. **Please provide a statement setting out why your methodology will ensure a robust and credible** **evaluation of the project**
4. **Pricing**

Please provide details of your price to deliver the requirements as specified in Section 2 of this document. Please provide a breakdown of costs referring your project methodology and achievement the required project outputs.

**Costs must be inclusive of all activity relating to the project, including expenses and must not exceed £20,000.**

Please refer to the Section 2: Specification for further details of the supplies/services required under this contract.

8 SELECTION CRITERIA

* 1. AWARD CRITERIA  
       
     Predetermined criteria will be used to assess and evaluate all quotation responses. These criteria are set out below. Contracts will be awarded based on the most economically advantageous quotation assessed from our point of view.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Criteria** | **Weighting** | **Scoring Criteria** | | | | |
| **Quality** | **60%** |  |  |  | |  |
| **Skills and relevant experience** - relevant expertise, experience and qualifications of person responsible for the activity including references from up to 3 other clients | **40%** | Fully demonstrated that personnel have relevant qualifications and/or relevant experience and have carried out more than one Summative Assessment of ERDF funded project (10 to 8 points) | Partially demonstrated that personnel have relevant qualifications and/or relevant experience and have carried out comprehensive evaluation of ERDF funded projects (7.5 to 5 points) | Minimal experience of evaluating of ERDF funded projects (4 to 2 points) | | Criteria not met at all (1 to 0 points) |
| **Technical Merit** – understanding of the key issues of relevance to the role and quality of approach/methodology and how this will address the objectives set out in the brief | **60%** | Presents a robust and creditable methodology that fully addresses the project requirements and meets all required project outputs within stated timescale (10 to 8 points) | A well-reasoned and acceptable methodology that adequately addresses the project requirements and meets project outputs within stated timescale 7.5 to 5 points)) | An adequate methodology that addresses the project requirements to meet the required outputs (4 to 2 points) | | Criteria not met at all (1 to 0 points) |
| **Price** | **40%** |  | | | | |
| **Cost - Value for money** – providing good value for money for the work required | **100%** | The lowest overall bid will receive full marks. All other offers will be scored a comparative mark, by calculating the percentage difference between them and the offer which achieved the highest mark and deducting this from the highest available mark.  e.g. Company A price = £1000 (40 points)  Company B price = £1250  Score for company B will be calculated as:  40 – (((1250 – 1000) / 1000)\*40) = 30 points | | | | |
| **TOTAL** | **100** |  | |  |  |  |

* 1. PROPOSED QUOTATION TIMETABLE

1. We propose the following outline timetable for the procurement of this service

|  |  |
| --- | --- |
| Activity | Date |
| Last Date and time for quotation clarifications | 22/3/23 |
| Deadline for return of Quotation Documents | 27/3/23 |
| Confirmation of contract award | 30/3/23 |
| Contract commences | 3/4/23 |

We reserve the right to change the above timetable.

1. QUOTATION QUERIES
   * 1. All queries, discrepancies or points of clarification regarding the quotation documentation which may have a bearing on the offer to be made must be raised no later than 7 calendar days before the deadline for submission. They must be raised in writing to Katheryn.gregory@eastriding.gov.uk.
     2. If relevant, responses to Quotation queries will be circulated to all Economic Operators.
2. QUALIFIED QUOTATIONS
   * 1. Quotations must not be qualified and must be submitted strictly in accordance with the Quotation Documentation. Quotations must not be accompanied by statements that could be construed as rendering the Quotation equivocal and/or placing it on a different footing from other Quotations. Only Quotations submitted without qualification strictly in accordance with the Quotation Documentation as issued (or subsequently amended by us) will be accepted for consideration. Our decision on whether or not a Quotation is acceptable will be final and you will not be consulted. Qualified quotations will be excluded from further consideration and the Economic Operator notified unless otherwise provided by law.
3. COMPLETING & SUBMITTING YOUR QUOTATION RESPONSE
   * 1. You must complete your quotation and submit this to Cheryl.McDougal@eastriding.gov.uk. Attachments may include (but are not limited to): Copies of Accounts; Schedule of Prices; Specification Checklist; Declarations; Method Statement, references etc.
     2. It is your responsibility to check that where responses to questions (including attachments) are required, these are fully complete, accurate and where necessary signed before submission.

* + 1. **The closing date for the submission of your Quotation Response and any supporting documentation is 17:00:00 on [ 27/3/23 ].**

* + 1. Where you are required to upload supporting documents as attachments, the document title should clearly reference the question or section that it refers to and your name.
    2. Attachments should be scanned to PDF file format before uploading. All other documents must be completed and submitted in the same format as it was published. For example: an MS Excel spreadsheet will need to be returned as an MS Excel spreadsheet and not as any other file format.
    3. The quotation documentation must not be amended in any other way than to respond, complete or sign submissions as indicated. Any other amendments or alterations in any way, will invalidate your submission.

1. ACCEPTANCE PERIOD
   * 1. The Quotation will be deemed to remain open for acceptance or non-acceptance for not less than 60 days from the quotation deadline date. We may accept the Quotation at any time within this prescribed period. We shall, however, not be bound to accept the lowest, most economically advantageous or any Quotation.
2. SUFFICIENCY AND ACCURACY OF QUOTATIONS
   * 1. You will be deemed to have examined all the quotation documents and by your own independent observations and enquiries will be held to have fully informed yourselves as to all matters relating to the scope of the work to be carried out in your resulting Quotation Response.
     2. It is your responsibility to ensure the accuracy and completeness of your Quotation Response prior to submission, failure to include all documentation requested will exclude your submission from the quotation process (except where the PQQ or ITT documentation specifically states otherwise).
     3. If we suspect that there has been an arithmetical error in the pricing contained within your Quotation Response, we reserve the right to seek such clarification as we consider necessary from you.
     4. It is your responsibility to ensure you familiarise yourselves with all regulations, laws, byelaws, and all other factors that may have a bearing on your Quotation submission.
3. CONFIDENTIALITY
   1. You shall treat the Quotation Documentation as private and confidential.
   2. You shall not disclose either:
      1. the fact that you have been invited to quotation or release details of the Contract; or
      2. details of your Quotation in whole or in part prior to the award of the Contract by us or on receipt of notification that the Quotation has not been accepted as the case may be, other than on an “in confidence” basis to those who have a legitimate need to know or whom you need to consult for the purpose of preparing the Quotation.
4. INCURRED EXPENSES
   1. We shall not be responsible for or pay any losses or expenses which may be incurred by you in the preparation and submission of your Quotation, including (but not limited to) the attendance at any pre or post quotation meetings, the delivery of any presentations by you to us in relation to your proposal, site visits or other negotiations.
   2. We will not accept claims for additional charges relating to the work made by you after acceptance of the Quotation if, in our reasonable opinion, such additional charges should have been established by proper inspection of the Quotation Documentation prior to quoting.
5. THIRD PARTY ISSUES
   1. You should provide any potential third parties you appoint to assist with the Contract with all necessary technical and commercial information to enable such third parties to accurately quote to you.
   2. It is our policy not to respond to any direct approach from such potential third parties seeking details about a particular ITT.
   3. You must declare the share of any contract you intend to sub-contract and list any proposed third parties in your Quotation Response.
6. PRICING AND PAYMENT
   1. Pricing

You should complete your Quotation Response noting the following:

* + 1. The currency in which all prices, costs or rates stated in the Schedule of Prices document must be quoted in Pounds Sterling and whole pence (i.e. to two decimal places).
    2. All prices quoted should be exclusive of VAT.
    3. Our standard payment terms are 30 days from the date on which the invoice is regarded as valid and undisputed.

1. COMPETITION
   1. You shall not fix the amount of the Quotation (or the rate and prices quoted) by agreement with any person and shall not communicate to anyone other than us the amount or approximate amount or terms of your proposed quotation (other than in strict confidence in order to obtain quotations, professional advice or insurance necessary for the preparation of the quotation).
   2. Your attention is drawn to the provisions of Chapter 1, Part 1 of the Competition Act 1998.
   3. If we consider that a cover price (i.e. a bid that is not intended to be considered seriously) has been submitted or you do not observe paragraph 18.1 we will reject the quotation and may decide not to invite you to quotation for future work.
2. PUBLICITY
   1. No publicity or other information relating to this project is to be released by you without the prior written approval of us.
   2. All publicity should be compliant with the England 2014 to 2020 European Structural and Investment Funds Growth Programme requirements.[[3]](#footnote-3)
3. DISCLOSURE OF INFORMATION UNDER THE FREEDOM OF INFORMATION ACT 2000 / THE GOVERNMENT TRANSPARENCY AGENDA
   1. Freedom of Information Act 2000 (FOIA) gives a right of access by any person (including companies) to information held by us, which could include information relating to or submitted as part of a quotation process. Certain information may be exempt on the grounds of confidentiality or commercial sensitivity
   2. We encourage all Economic Operators to visit the Information Commissioners website at www.informationcommissioner.gov.uk for further information on the FOIA and its effect on public authorities, Economic Operators and service providers in relation to the disclosure of information in respect of public sector quoting and contracts and specifically to access Awareness Guidance Document No. 2 (Confidential Information) and Awareness Guidance Document No. 5 (Commercial Interests) on the application of the exemptions from disclosure under the FOIA.
   3. You should indicate, with supporting reasons, the parts of your quotation submission and contract which you consider are commercially sensitive under Section 43 of the FOIA and/or confidential under Section 41 of the FOIA should a Freedom of Information (FOI) request be received by the us, in writing.
4. WHISTLEBLOWING
   1. We are committed to the highest possible standards of openness, probity and accountability and will take all steps possible to prevent and eliminate fraud and corruption whether it is attempted on the Council or from within it.
   2. In line with that commitment, you or any of your employees, servants, sub-contractors, suppliers or agents or anyone acting on your behalf with any concerns about any aspect of our work is required to come forward and voice those concerns.
   3. We have in place a whistle blowing policy, enabling anyone with concerns to report confidentially something that:

Is unlawful; or

Is against our Constitution or policies; or

Falls below established standards or practice; or

Amounts to improper conduct.

* 1. Examples of malpractice in this context may include concerns about possible corruption, financial irregularities, bias within the quotation process, bribery or health and safety breaches.
  2. This whistle blowing policy can be found on our website:

[http://www.eastriding.gov.uk/council/governance-and-spending/fraud-and-corruption/whistle-blowing/?locale=en](http://www2.eastriding.gov.uk/council/governance-and-spending/fraud-and-corruption/whistle-blowing/?locale=en)

* 1. Concerns can be reported in writing or by telephone to the Audit and Technical Manager on 01482 394105, the Director of Corporate Resources or Chief Executive. We also have a confidential whistle blowing telephone facility, where information can be left anonymously if required – telephone 01482 394123 or email [whistleblower@eastriding.gov.uk](mailto:whistleblower@eastriding.gov.uk). Alternatively the Audit Commission (an independent body) may be contacted via a special telephone line on - 0845 052 2646.
  2. There is an expectation and requirement that all individuals and organisations associated with us in whatever way will act with integrity, and that our staff at all levels will lead by example in these areas.
  3. You can expect to be dealt with by us in an open, fair and transparent manner, in accordance with our contract procedure rules which can be found in our Constitution available on the website.

1. EXCLUSION
   1. We are not committed to any course of action as a result of issuing the quotation documentation. In particular you should note that we:
   2. May not accept any proposal; and
   3. Do not commit to accepting the lowest price, most economically advantageous, or any bid.
2. TENDERER’S WARRANTIES
   1. In submitting your quotation, you represent and undertakes to us that:
   2. All information, representations and other matters of fact you, your staff or agents communicate (whether in writing or otherwise) to us, in connection with or arising out of the quotation are true, complete and accurate in all respects, both as at the date communicated and as at the date of submission of the quotation response.
   3. You have the full power and authority to enter into the contract and perform the obligations specified in our Contract Terms and Conditions and will, if requested, produce evidence of such to us.
   4. You are of sound financial standing and have and will have sufficient working capital, skilled staff, equipment and other resources available to you to perform the obligations specified in the quotation documentation.

1. https://www.gov.uk/government/publications/european-structural-and-investment-funds-programme-guidance [↑](#footnote-ref-1)
2. https://www.gov.uk/government/publications/european-structural-and-investment-funds-programme-guidance [↑](#footnote-ref-2)
3. <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/735917/ESIF-GN-1-005_ESIF_Branding_and_Publicity_Requirements_v7.docx>.  [↑](#footnote-ref-3)