

Commercial in Confidence

Invitation to quote for 2018 Business West Skills West project

Background

GWE Business West Ltd (Business West) is a key player in delivering support solutions to businesses in the South West and is seeking bids from suitable organisations to conduct a telephone survey and appointment setting campaign for the Skills West project.

You are invited to submit a quote for the provision of both of the elements below:

1. A telephone research campaign to achieve the required survey outputs
2. Generation of appointments for Skills West business advisers

Skills West is funded through the European Social Fund and Education & Skills Funding Agency and commissioned by the West of England Local Enterprise Partnership. Skills West helps businesses to identify and tackle skills gaps whilst connecting them with local and national training providers to ensure they get the most relevant, quality training.

One of the key targets for this project is the completion of a Business Skills and Training Survey. The objective of the survey is to gather intelligence to feed into the overall West of England Skills strategy. It will gather information on skills shortages, recruitment and workforce development across West of England businesses. The results will be analysed to produce Local Sector Skills Statements which will be used to inform local businesses of skills strategies and will also help training providers to develop future training provision.

The other key objective of this project is the provision of business skills advice by a Skills West adviser. Skills West offers businesses free impartial skills advice and support to source training relevant to their business – this can be anything from short training courses through to apprenticeship courses. We can also provide advice on apprenticeship funding – which can now be used for existing and new members of staff, this is something that businesses are not often aware of so is another source of support for their business growth plans.

Target audience:

- Businesses based in the West of England area (encompassing the areas of Bristol, Bath & North East Somerset, North Somerset and South Gloucestershire).
- For the survey we will primarily target SMEs with 3-250 employees, however we may wish to approach a number of businesses below and above this band.
- For the appointment setting campaign, businesses must be SME status (under 250 employees).
- The primary industry sectors for the project are Creative and Digital, Professional Services, Advanced Engineering and Aerospace, High-tech, Health and Life Sciences, Low Carbon and

Construction. However we will accept survey responses and appointments from businesses across all sectors.

- Relevant job role will be dependent on the size of the business, where there is an HR function the HR/training manager is the appropriate contact, in smaller businesses it will be the Managing Director/Owner.

1.0 Telephone research campaign

- As part of the Skills West project we have already completed a Business Skills and Training survey between July and December 2017. Therefore this part of the project will contain two elements:
 - I. Completion of new 2018 survey by new customers.**
 - The new 2018 survey has been piloted in a telephone campaign during January 2018.
 - There are 5 sections:
 - a. About the business
 - b. Recruitment
 - c. Skills and Training – this section is split between sector specific questions and a general set of questions
 - d. Apprenticeships
 - e. Working with Education and Training Providers
 - There is routing built into the survey which means the survey can take differing amounts of time. We estimate that the survey will take between 8-15 minutes to complete.
 - II. Re-approach businesses that took 2017 survey to take a shorter 2018 version.**
 - This survey is shorter and the objective is to find out how business' skills needs and priorities have changed since taking the first survey.
 - It has a maximum of 12 questions (dependent on routing) and we anticipate should take between 3 – 6 minutes to complete.
- Pdfs of the draft surveys are provided.

Requirements

- We require between 800 - 1000 completed surveys by 30 June 2018, to be split by approximately 70% new 2018 surveys and 30% retake surveys.
- Return the completed surveys by telephoning key business contacts and completing the survey on their behalf. If this is not possible, gain permission and send them an email with a link to an online version of the survey to complete in their own time.
- Provide a draft call script which demonstrates understanding of the Skills West survey proposition, to be agreed with Business West.

- Work with Business West to ensure a clear and simple process is agreed to record clients who do not complete the survey over the phone but sent the survey link by email, to allow Business West to monitor/follow-up on these as appropriate.
- Only one survey per organisation can be counted.
- We will expect excel spreadsheets of completed survey results to be returned twice a week. We would also expect individual pdfs of the full completed surveys, in an agreed format, to be returned on a weekly basis.

Data

For the new 2018 survey, Business West will provide a limited amount of data from its CRM system, this will be of varying degrees of data quality. We will require new data to be purchased, please provide costings for this.

For the retake survey, Business West will provide the data of individuals who have previously taken the 2017 survey.

Supporting information

- As an incentive, each business which completes the survey will go into a draw to win either a £200, £75 or £50 Amazon or Cabot Circus voucher. Every person who completes the survey will also receive a final report of the findings.
- Whilst the telephone will be the primary channel for capturing survey responses, the survey will continue to be promoted via various social media and digital channels. It will also be promoted by a range of partners to their business networks. Therefore Business West will provide a daily report of new survey respondents to ensure there is no duplication.

2.0 Appointment setting campaign

You are invited to submit a proposal for the provision of telemarketing services to generate adviser appointments for the Skills West programme.

Requirements

The project started in 2017 and whilst we have a number of companies in our pipeline there is a need to increase this figure in order to achieve outputs. Currently we've a barrier in generating appointments in our skills adviser's diaries. To overcome this we are looking for help to improve business engagement and hope to do this through a targeted telemarketing campaign.

We anticipate that during the call it would be identified through answers to the survey if the business had a skills need and therefore could be converted into an appointment for a skills adviser.

We would like the campaign to generate a minimum of 100 appointments.

Appointments can be made for advisers through various channels; face-to-face, skype, telephone or during a skills advice clinic (dates of these will be provided). Appointments must be set for businesses within a reasonable geographical travel distance.

We will provide you with access to the adviser's diaries so these can be booked directly into their calendars.

Timescale

The closing date for receipt of tenders is strictly 5pm on Monday 5th March 2018.

The contract will be awarded as soon as possible after this date and we are looking for the work to commence 12th March 2018 and to end no later than 30 June 2018.

Price

We ask that you provide a price per each of the sections of the project below:

1. A telephone research campaign to achieve the required outputs

- Please provide a price per survey completion for the new 2018 survey.
- Please provide a price per survey completion for the re-approach to businesses that have taken the 2017 survey.
- Please provide an expected number of survey completions split between new 2018 and shorter retake survey.

2. Generation of appointments for Skills West business advisers

- Please provide a price per telephone conversion which results in an appointment set in a skills adviser's diary.
- Please provide the number of expected total appointments.

The total price of this contract is not expected to exceed £23,000 (twenty-three thousand pounds) exclusive of VAT and this must include any associated set up costs. Your quote should include the cost proposed (exclusive of VAT), payment terms and a profile of invoicing over the term of the contract.

Process

Within your quote we ask that you briefly explain your planned approach and your Project Management process.

Quote Requirements

Applicants are required to provide evidence of the following in respect of the scope of work defined:

1. Experience and understanding of Skills programmes and issues.

2. 3 recent examples (within the last two years) to demonstrate a successful track record of working with similar business support organisations.

Please submit a copy of your policies:

1. Equality and diversity
2. Health and safety
3. Data protection
4. Sustainability

Please could you also provide an explanation about how you will approach the project in relation to the changes in GDPR.

Quote Evaluation

Your quote will be evaluated upon the following criteria:

- knowledge of the subject matter (experience and understanding Skills programmes and issues)
- capability and capacity to deliver the quantity of responses (planned approach, project management process)
- experience of previous assignments (successful track record of working on similar assignments)
- value for money

Clarification Questions

Any questions relating to the clarification of any aspect of this invitation to quote must be made in writing via email to: nicky.williams@businesswest.co.uk

Deadline for Quotes

Please email your quote to procurement@businesswest.co.uk entitled:

Quote for Skills West 2018 Project: name of your company

The closing date for receipt of quotes is 5pm Monday 5th March 2018.

Contract award

The contract is expected to be awarded by Friday 9th March 2018.

Terms and Conditions

The contract will be awarded subject to Business West's standard terms and conditions.