



Invitation to Tender

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‘Finance Finder Portal’

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Provision of a service that allows businesses to search for suitable finance solutions

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TENDERS MUST BE SUBMITTED IN ACCORDANCE WITH THE FOLLOWING INSTRUCTIONS. TENDERS NOT COMPLYING WITH THESE INSTRUCTIONS MAY BE REJECTED BY GFIRST LEP WHOSE DECISION IN THIS MATTER SHALL BE FINAL. THIS INFORMATION AND INSTRUCTIONS ARE PROVIDED FOR THE ASSISTANCE OF TENDERERS BUT DO NOT FORM PART OF THE TENDER DOCUMENT.

SECTION A – BACKGROUND INFORMATION

1.0 Background

- 1.1 The Growth Hub opened in October 2014, as a very unique partnership between GFirst LEP and the University of Gloucestershire. We set out to help all growing Gloucestershire businesses accelerate their growth, boosting the economy and prosperity of the county. Further information can be found on our web site:

www.thegrowthhub.biz

2.0 The Requirement

Summary

- 2.1 In response to customer demand, The Growth Hub have identified that the provision of a solution that allows users to more easily access providers of business financing solutions would enhance their Digital Growth Hub offering.
- 2.2 This tool would be integrated into the existing Digital Growth Hub experience as much as possible so as to provide a seamless customer journey through use of the features and maintain an auditable record of the clients' interactions with the Growth Hub and use of this tool.
- 2.3 It is required that this new tool will be launched no later than 30 October 2018 and that the accompanying commercial arrangements ensure that there is adequate support and maintenance arrangements in place for the period to March 31st 2022.

Objective – Finance Finder Portal

- 2.4 The Growth Hub, by providing ambitious Gloucestershire SMEs with fully funded independent and impartial business support, aim to empower these businesses to grow the Gloucestershire economy and to increase the number of jobs in the county. The Finance Finder Portal supplier will be called be providing a solution that meets the need of the most requested type of support, that of where to find financing solutions. Therefore the Finance Finder Portal will need to be able to capture details of a company's situation, what their needs are and present, where applicable, a range of providers that could be able to address the company's needs.

Utilisation

- 2.5 The Finance Finder Portal tool will be accessed via the Growth Hub website (www.thegrowthhub.biz) and as such it should be possible to be integrated as seamlessly as possible with the existing customer experience of the Growth Hub website.
- 2.6 The Finance Finder Portal will also be required to capture data – anonymised where necessary - which is accessible by GFirst LEP employees and selected users to understand the financing needs of Growth Hub clients.

Specification

- 2.7 The expectation for this feature is that it enables a business to identify possible suitable providers of business finance solutions. Therefore key requirements for this feature are as follows:

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- (a) It must be possible for a user to enter key company financial data for matching against a database of business finance solution providers.
- (b) The solution provider must already have a broad database of up to date business finance organisations in the UK that serve the SME market.
- 2.8 This project seeks to, as closely as possible, seamlessly integrate a finance finder solution into the existing Growth Hub website user experience, therefore it must be possible for the solution to be branded in-line with the Growth Hub brand guidelines.
- 2.9 The product should be able to integrate with the Growth Hub CRM's API to facilitate the sharing of data to optimise the user experience and to align with the Growth Hub's data protection policies and processes.
- 2.10 The supplier should have controls and processes in place that ensure that user data is adequately secured to comply with GDPR regulation and to prevent unlawful disclosure of information.
- 2.11 The supplier should have controls and processes in place to ensure that the information held within their database remains up to date and relevant to ensure that solutions presented to clients are accurate.

3.0 Procurement Timetable

- 3.1 The anticipated procurement timetable for this opportunity is set out below; however no guarantee is implied by these dates.

Date	Activity
11 July 2018	Publish ITT document pack.
02 August 2018	Deadline for clarification queries.
09 August 2018	Deadline for submission of tenders – 17:00.
23 August 2018	Evaluation of tenders complete – supplier shortlist selected – maximum of 3 suppliers.
30 August 2018	Option for GFirst LEP to invite suppliers to interview by the evaluation panel. The interview will start with suppliers giving an overview of their proposals. The purpose of any interviews will be for GFirst LEP to clarify that they have understood the suppliers proposals and for the suppliers to clarify that they have understood GFirst LEP's requirements. This is not an opportunity for suppliers to score more marks by introducing new elements to their proposals. GFirst LEP reserves the right to adjust evaluation scores accordingly.
04 September 2018	Issue contract award notices and commencement of standstill period.
14 September 2018	Standstill period ends.
17 September 2018	Start of contract.

4.0 Linkage and Support

- 4.1 The selected supplier will need to liaise and work closely with:
- Growth Hub Manager
 - Growth Hub Data Controller
 - Growth Hub Digital Marketing Manager
 - Growth Hub Business Navigators and Guides
 - GFirst LEP Project Management

5.0 Form of Contract

- 5.1 The contract will be based on an agreed version of the Supplier's own contract for services.

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SECTION B – TENDER INFORMATION and INSTRUCTIONS

1.00 Tender Evaluation

- 1.01 Upon receipt of the tender submissions GFirst LEP will carry out a detailed evaluation process to shortlist a maximum of three suppliers for interview if required.
- 1.02 If interviews are conducted then they will start with the invited supplier(s) giving an overview of their proposals. The purpose of the interviews is for GFirst LEP to clarify that they have understood the suppliers proposals and for the suppliers to clarify that they have understood GFirst LEP's requirements. This is not an opportunity for suppliers to score more marks by introducing new elements to their proposals. GFirst LEP reserves the right to adjust evaluation scores accordingly.

Interview schedule

Introductions	5 minutes
Presentation of outline proposal	30 minutes
Q&A/Discussion	15 minutes

- 1.03 The contract will be awarded to the partner submitting the most economically advantageous tender – 40% price and 60% quality.

2.00 Completion of Pricing

- 2.01 Potential suppliers are required to complete a method statement as requested below. Pricing should include VAT.

3.00 Submission

- 3.01 The tender should be submitted strictly in accordance with the tender documents and without qualifications. Failure to comply with this requirement may at the discretion of GFirst LEP, invalidate the tender.
- 3.02 To enable GFirst LEP to assess the supplier capability, please provide the following method statements using your own style.

3.03 Quality & Pricing Evaluation Method Statements

Suppliers are required to provide method statements in their own style that respond to the following criteria:

Criteria – Quality	Marks
1. Experience	
(a) Describe your experience of providing this type of service and of similar contracts.	10
(b) Provide contact details of two references which GFirst LEP may check	

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	before awarding the contract. (c) Please provide CVs for the key members of your team that will be used to deliver the requirements.	Pass/Fail 10
2	Skills and expertise Please outline the range of skills and expertise that you possess that will enable you to successfully deliver the Requirement.	10
3	Service delivery proposal Please describe your service delivery proposal to show exactly what will be delivered and how it will meet all of the requirements contained in the Section A – paragraph 2.1 onwards.	25
4	Sustainability GFirst LEP takes responsibility for sustainability and ethical sourcing seriously. Suppliers are therefore requested to comment on the sustainability credentials of the services and approach that they propose to provide. For example: Fair Trade, ethical sourcing, supply chain management, sustainably efficient means of communication, initiatives in the supply chain to reduce the use of energy, chemicals, water, packaging, initiatives to ensure employee rights, health and safety and welfare etc.	5
Criteria – Pricing		Marks
5	Please provide a schedule of pricing or commercial arrangement, including VAT, for the provision of the service from yourselves, the supplier, to GFirst LEP.	40

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4.00 Tender Evaluation Criteria

Quality (60%)

4.01 The evaluation of method statements will be made using the criteria listed above (3.03) and the marking scheme listed below:

Description	Marking Range	Evaluation Criteria
Inadequate	0 to 1	Significant indications that supplier lacks certain requirements in this area to achieve the required standard of service delivery / information totally inadequate.
Concerns	2 to 4	Some concerns that supplier may lack certain requirements in this area to achieve the required standard of service delivery.
Potential	5 to 7	Information, rather than examples, indicating potential to deliver outcomes.

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Capable	8 to 10	Comprehensive and strong information and examples indicating supplier capable of delivering outcomes to required standard.
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The marks within each range will be awarded depending on the degree which the description of the evaluation criteria applies.

If a score of **0 to 1** is applied to the evaluation of any question, the tender will be **eliminated**.

If a score of **1** is applied, 10% of available marks for that question will be awarded.

If a score of **2** is applied, 20% of available marks for that question will be awarded.

If a score of **3** is applied, 30% of available marks for that question will be awarded.

If a score of **4** is applied, 40% of available marks for that question will be awarded.

If a score of **5** is applied, 50% of available marks for that question will be awarded.

If a score of **6** is applied, 60% of available marks for that question will be awarded.

If a score of **7** is applied, 70% of available marks for that question will be awarded.

If a score of **8** is applied, 80% of available marks for that question will be awarded.

If a score of **9** is applied, 90% of available marks for that question will be awarded.

If a score of **10** is applied, 100% of available marks for that question will be awarded.

Example:

There are **25** marks available for 3.03 (3) in the table above. If a score of **6** is applied to a supplier's response, the supplier will be awarded **15 marks** for that response. (i.e. 60% of the 25 marks available).

Important Note: Suppliers should not assume members of the evaluation panel have any prior knowledge of their organisation. The assessment will be made on the written response provided.

Pricing (40%)

4.02 Pricing models will be reviewed and evaluated using the below methodology.

4.03 Following any required clarification with potential partners to ensure as far as possible that the pricing elements of the offers are being evaluated on a 'like for like' basis, marks will be awarded based on the lowest overall tender price for the preferred delivery model receiving 100% of the marks available. The other prices submitted for the similar delivery models from the other Potential suppliers will be compared to the lowest price and the difference between those prices will be expressed as a percentage of the lowest price.

For every one percent the price is above the lowest price the supplier will lose 1% of the marks available.

For example:

Tender Offer	Difference from lowest	% difference from lowest	Marks awarded out of 40
£10,000	£0	0%	40
£11,000	£1,000	10%	36
£12,000	£2,000	20%	32
£15,000	£5,000	50%	20
£20,000	£10,000	100%	0

5.00 Queries

- 5.01 Any queries regarding the tender process should be raised as correspondence via e-mail to gfirstadminteam@gfirstlep.com.
- 5.02 Any queries that may have a material effect on the costing of the tender will be circulated to all Suppliers along with GFirst LEP's response. Queries received less than seven days before the closing date may not be answered. If a query gives rise to the need for an amendment to the original tender documents an extension to the closing date may be made, in which case all parties will be notified simultaneously. Please note the latest time for receiving queries relating to this tender is **12.30pm on Thursday 02 August 2018**.

6.00 Submission of Tender

- 6.01 Tender submissions must be made via e-mail, with submissions e-mailed to gfirstadminteam@gfirstlep.com by **17.00pm on Thursday 09 August 2018**
- 6.02 No other method of tender submission will be accepted. GFirst LEP may, after the opening of the tenders, enter discussions or post-tender negotiations with any potential partner.

7.00 Contract Award

- 7.01 The contract will be awarded to the potential partner submitting the most economically advantageous tender in terms of quality and price. (Quality Marks + Price Marks).
- 7.02 GFirst LEP reserves the right to cancel the process at any stage. However, assuming that a tender is successful, GFirst LEP will notify all Suppliers simultaneously about the intended award.

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