**CIOS Growth Hub (Phase 2)**

**Request for quotation**

**Project evaluation and summative assessment**

**Cornwall Council**

**August 2022**

Cornwall Council is seeking proposals for a project evaluation/summative assessment for the CIOS Growth Hub (Phase 2) project, which is part-funded by the European Regional Development Fund (ERDF).

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1. **About CIOS Growth Hub (Phase 2)**

The CIOS Growth Hub (Phase 2) project is delivering an investment of £3,487,750 for the provision of a Growth Hub in CIOS. This project was a response to ERDF Call reference OC05R17P 0600 under Priority Axis PA3 IP3d.

The project’s start date was 1st October 2018 and its Activity End Date, Practical Completion Date and Financial Completion Date are respectively;

* Activity End date: 30th June 2023
* Practical Completion Date: 31st August 2023
* Financial Completion Date: 31st July 2023

The Cornwall & Isles of Scilly Growth Hub (CIOSGH) Phase 2- project responds directly to the requirements of LEP areas to have a fully functioning Growth Hub to facilitate and simplify access to business support. The central idea is the provision of a simplified, single access point that businesses can engage with to access local and national support programs and information.

The CIOSGH encourages and supports businesses to grow, innovate and invest through a one-stop service for information and guidance on and access to business support provision. It does this through a content-rich website and social media activity backed by a telephone and face-to-face/virtual service delivered by a team of experienced Business Connectors across Cornwall and the Isles of Scilly.

Target beneficiaries are all eligible pre-starts, start-ups, micro businesses and SMEs, including social enterprises, throughout the CIOS LEP area. The Growth Hub team comprises a management function, Business Connectors supported by marketing & communications specialists and a back-office staff. The Business Connectors offer a long-term client relationship opportunity for businesses with growth potential. The website operation is contracted out to a third-party web development company but managed by the Operations Manager. The team has developed and changed over the life of the project to reflect the client need and operational landscape.

The Growth Hub has a Management Board structure comprises of representatives of funders, other business organizations and networks and private sector partners to oversee provision and monitor performance. The chair of the Management Board is the SME representative on the LEP Board. The Management Board is shared across the ESF funded Skill Hub to comprise the Growth & Skills Hub Management Board.

The Growth Hub works closely and co-ordinates business support promotional activity and events with other providers to ensure join-up and efficiency including in the investment of public money. This forms part of MoA arrangements with other providers.

The central task of the Growth Hub is to simplify access to business support provision, for growth and growth potential businesses. This is achieved via a detailed diagnostic, action planning and referral service for eligible criterion businesses. It is planned to service;

* 3450 (P13 Output) businesses with a minimum 3- Hour intervention focused on the Information, Diagnostic and Brokerage Model (IDB)
* A small grants scheme (the Access to Growth Fund -A2GF) where across the life of the project it will administer 100 Grants to businesses in CIOS (C1 Output)

In September 2020 CIOSGH also launched the ERDF COVID Kickstart Grant Scheme. This was a ‘child project’ through additional funds made available through DHLUC across all Growth Hubs in England for COVID Recovery. CIOSGH was awarded funds to administer circa 480 grants to businesses under two schemes:

1. Visitor Economy- £1,068,902
2. Wider Economy- £ 500,000

Total- £1,568,902

The final claim for the above project was submitted for the quarter ended 30 June 2021.

The evaluation must take into consideration, and report on the performance of this scheme as part of the contract (information will be provided prior to the inception meeting).

In addition to its discrete functions, the Growth Hub manages a Client Relationship Management (CRM) system where all the client data is stored for intelligence and reporting purposes. This is shared across all projects within the Hub.

The project has submitted two project change requests in its lifetime and whilst originally due to finish in October 2021, has been granted an extension to June 2023. These will be made available prior to the inception meeting.

1. **ERDF requirements**

ERDF funded projects are contractually required to produce an evaluation in the form of a “Summative Assessment” at least three months prior to the final grant claim to demonstrate how the project has performed against its stated objectives, outputs and outcomes, although a closer two-month gap date has been proposed (i.e. 30/06/2023). A summative assessment plan is also required within the first three to six months of the grant funding agreement being signed; this has been prepared but was delayed due to the change in project emphasis. Guidance issued by the ERDF Managing Authority, the Department for Levelling Up, Housing and Communities, (DLUHC) states:

*Summative assessments are intended to provide insights into project performance to enhance project implementation, reliable evidence of their efficiency, effectiveness and value for money, as well as insights into what and why interventions work (or not), and lessons for the future. It will also provide project level evidence which, combined with national evidence of progress and impact, will result in stronger evidence of the overall impact and effectiveness of the ERDF operational programme across England. The evidence will also be particularly helpful for you in making the case for particular delivery approaches in the future or making the case for future funding. The evaluation should be based on the outcomes and intended impacts identified in the project’s logic model which was completed in 2018 and the report should follow the structure set out in the guidance (links below). However, this should not preclude the inclusion of other material that is considered to be material to an insightful evaluation.*

Detailed guidance on the requirements of these reports can be found using the following links:

* <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/896857/ESIF-GN-1-033_ERDF_Summative_Assessment_Guidance_v4.pdf>
* <https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/896858/ESIF-GN-1-034_ERDF_Summative_Assessment_Guidance_Appendices_v4.pdf>
1. **Objectives of the summative assessment**

The guidance requires all summative assessments to consider the following themes:

* The continued relevance and consistency of the project;
* The progress of the project against contractual targets;
* The experience of delivering and managing the project;
* The economic impact attributable to the project; and
* The cost-effectiveness of the project and hence its value for money.

and to include the following key sections:

* Project context
* Project progress
* Project delivery and management
* Project outcomes and impact
* Project value for money
* Conclusions and lessons learned

Within each of those sections, the guidance poses questions which the assessments must explore. Since the value of the project does not exceed £10m a counterfactual impact assessment is not required.

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. Cornwall Council is particularly interested in the strategic added value of the project, its impact in relation to the two ERDF cross-cutting themes of sustainable development and equality and diversity, and its legacy for businesses, stakeholders and the wider Cornish economy.

The summative assessment will be shared with project partners and also with those organisations involved in ERDF audit and evaluation including (but not limited to) organisations undertaking the ERDF National Evaluation, DLUHC, HM Government, and the EU/EC. It may also be shared with other interested parties.

1. **Deliverables and timescale**

The successful supplier will be required to deliver, within the guidance and timescales referred to elsewhere in this document:

* A review of the prepared summative assessment plan (Enclosure 1), to incorporate data monitoring requirements and/or recommendations
* A summative assessment report and
* A summative assessment summary on the prescribed Excel template (to be provided)

All the necessary information and documents will be made available to the successful supplier on award: the logic model is at Enclosure 2. The CIOS Grow Hub team will consider any suggestions or recommendations that the successful supplier may make regarding data monitoring. The successful supplier will be expected to consult with the project team and with stakeholders / beneficiaries as appropriate, and also to undertake any research that may be relevant and appropriate.

As stated above, the summative assessment plan has been submitted to DLUHC. Cornwall Council requires the successful tenderer to meet with the CIOS Grow Hub Team no later than the 31 January 2023 to discuss initial findings and resolve any outstanding issues, followed by a draft report no later than 28 February 2023 and the final report by 30 March 2023.

1. **Budget**

The maximum available budget for this commission is £24,000 (excluding VAT). This sum must cover all the activities and expenses expected to be incurred to carry out the services, including:

* All travel and subsistence
* Resource time
* Reporting
* Planning and delivery.
1. **Terms and conditions**

As this project is funded by the European Regional Development Fund, the [ESIF Branding and Publicity Requirements](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/836956/ESIF-GN-1-005_ESIF_Branding_and_Publicity_Requirements_v8_updated.pdf) must be rigorously adhered to including (but not limited to) displaying the relevant logo.

The successful bidder will be required to sign Cornwall Council’s standard consultancy agreement, a copy of which is attached at Enclosure 3.

Invoicing must be completed in time to allow defrayal no later than the project’s Financial Completion Date on 31st July 2023.

1. **Quotation timescale**

Clarifications should be sent to kirsty@ciosgrowthhub.com in accordance with the timetable below; clarifications will be shared anonymously through Contracts finder.

Quotations should include the information set out in section 8 below and must be submitted electronically in accordance with the timetable below to stu@ciosgrowthhub.com with the subject heading “CIOS Growth Hub summative assessment quotation – [ADD YOUR COMPANY NAME]”.

It is anticipated that the outcome will be notified to bidders and Cornwall Council’s consultancy agreement will be signed and an inception meeting will take place, via Microsoft Teams, as per the timetable below:

|  |  |
| --- | --- |
| Milestone | Date  |
| Request for quotation posted on Contracts Finder | 2 August 2022 |
| Last date for receipt of clarifications | 12 August 2022 |
| Clarifications made available to tenderers | 15 August 2022 |
| Deadline for receipt of quotations | 1700: 23 August 2022 |
| Evaluation  | 24 August 2022 |
| Outcome notification | 26 August 2022 |
| Agreement signed and inception meeting | W/C 29 August 2022 |

1. **Quotation Submission Requirements**

Covering letter (two sides of A4 maximum) to include:

1. A single point of contact for all contact between the tenderer and Cornwall Council during the tender selection process, and for further correspondence.
2. Confirmation that the tenderer has the resources available to meet the requirements outlined in this brief and its timelines as per section 4
3. Confirmation that the tenderer agrees and accepts Cornwall Council’s standard consultancy agreement attached at Enclosure 3
4. Confirmation that the tenderer will be able to meet the Requirements at Section 10, 11and 12 to include confirmation that Equality and Diversity, Environmental and Data Protections policies are in place and, if successful, supporting documentation will be provided as evidence
5. Confirmation that the tenderer holds current valid insurance policies as set out in Enclosure 3 and, if successful, supporting documentation will be provided as evidence
6. Conflict of interest statement as per section 13
7. Confirmation that the tenderer will adhere to the ESIF Branding and Publicity Requirements.
8. If you are the successful bidder you agree to the terms and conditions in Cornwall Council’s standard consultancy by signing the agreement.

 i. Proposal to include (see also Section 9)

* Overview and business continuity arrangements
* Track record
* Delivery Team (limit of one page of A4 per team member)
* Methodology/approach

Budget. Provide a fixed fee for this commission to exclude VAT but include all travel and expenses broken down as per the table below:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Price/ activity** | **Number of people** | **Number of days** | **Cost Per hour £** | **Cost Per Day £** | **Cost £** | **Staff grade1** |
| Summative assessment2 |   |   |   |   |   |  |
|  |  |  |  |  |  |  |
| Total Cost £ |  |  |

Notes:

1. Staff Grading – please use the staff grade descriptions below
2. Add additional lines as required

**Staff grading characteristics**

|  |  |
| --- | --- |
| **Grade**  | **Indicative characteristics**  |
| Trainee Consultant  | Graduate with technical competence relevant to the requirement specified by the client.  |
| Junior Consultant  | Demonstrable experience in a wide range of projects in their specialist field. Evidence of client facing experience and support services to wider consultancy projects. Typically we would expect a person within this category to have had relevant exposure.  |
| Consultant  | Notable experience and in-depth knowledge of their specialist field. Evidence of a wide range of consultancy projects and client facing experience. Support work in process and organisational design and leading workshops and events. Typically we would expect a person within this category to have relevant experience.  |
| Senior Consultant  | Substantial experience in their specialist field and in a consultancy/training role. Previous experience in project management and working in a wide range of high quality and relevant projects. Familiarity of the issues/problems facing public sector organisations. Typically we would expect a person within this category to have proven experience.  |
| Principal Consultant  | Substantial experience in their specialist field and in a consultancy/training role. Sound knowledge of the public sector and current policy and political issues affecting it. Previous experience in project management on at least three major projects, preferably in the public sector and using the PRINCE2 or equivalent method. Typically we would expect a person within this category to have significant, proven relevant experience at an expert level.  |
| Managing Consultant  | Substantial experience in their specialist field and in a consultancy role. In depth knowledge of the public sector and of current policy and political issues affecting it. Previous experience in project management on at least five major projects, preferably in the public sector and using the PRINCE2 or equivalent method. Typically we would expect a person within this category to have significant, proven, industry recognised experience at an expert level.  |
| Director/ Partner | Substantial experience in their specialist field and in a consultancy role. In depth knowledge of the public sector and of current policy and political issues affecting it. Previous experience in project management on at least five major projects, preferably in the public sector and using the PRINCE2 or equivalent method. Typically we would expect a person within this category to have significant, proven, industry recognised experience at a leadership level. |

1. **Evaluation and award criteria**

Bids will be scored on quality (65%) and price (35%) as follows:

1. **Quality – 65% (maximum marks 100)**

|  |  |  |
| --- | --- | --- |
| **Quality Area** | **Evaluation Criteria** | **Marks** |
| **Overview and business continuity arrangements** | Please outline:* Your business structure and the services you deliver relevant to this commission
* What business continuity arrangements will be in place to ensure delivery in the event of expected or unexpected contingencies, including but not limited to staff unavailability, loss of information technology, loss of premises, and receivership/administration/insolvency
 | 10 |
| **Track record** | Please set out your track record of undertaking evaluations and summative assessments on environmental/green infrastructure/ERDF PA6 projects | 20 |
| **Delivery team** | Please provide details of staff who will undertake/contribute to the work, including relevant experience that each of them has | 20 |
| **Methodology/approach** | Please set out your proposed methodology / approach to this commission, including:* Your understanding of the ERDF guidance on summative assessments
* Your proposed evaluation methodology
* What if any research you would propose to undertake
* What tasks or stages you would envisage as forming part of the work
* Your proposed timescales for the various tasks/stages identified
 | 50 |

**Scoring Descriptors**

|  |  |  |
| --- | --- | --- |
| **Scoring Grade** | **Descriptor**  |  **Mark** |
| **Unacceptable** | Unanswered or failed to adequately address the requirement | 0 |
| **Poor** | The information submitted is very limited, inconsistent with the rest of the submission, and/or no supporting documentation has been provided | 20 |
| **Fair** | The information submitted is limited, has some inconsistencies with the rest of the submission and/or insufficient supporting documentation has been provided. | 40 |
| **Satisfactory** | Satisfactory response to the requirements which provides adequate evidence but contains inconsistencies. | 60 |
| **Good** | Good response to the requirements which provides evidence which is clear but 'has minor inconsistencies. | 80 |
| **Excellent** | Excellent response to the requirements which provides detailed evidence which 'is clear, complete and consistent. | 100 |

1. **Price – 35% (Maximum marks 54)**

The bidders’ prices will be scored on a comparative basis.  This will be done by recording the lowest price submitted by any of the bidders then, for each bidder, dividing this lowest price by the bidder’s price and then multiplying it by the allocated weighting of 54.  The equation set out below explains this in a simpler way:

(Lowest Price ÷ Bidder’s price) x 54 = Score

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Price/ activity** | **Number of people** | **Number of days** | **Cost Per hour £** | **Cost Per Day £** |  **Cost £** | **Staff Grade1** |
| Summative assessment |   |   |   |   |   |  |
| Summative assessment2 |  |  |  |  |  |  |
| Total Cost |  |  |

1. **Equality and Diversity (see also Enclosure 3)**

Cornwall Council 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.

1. **Environmental Policy (see also Enclosure 3)**

Cornwall Council 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.

1. **Data Protection** **(see also Enclosure 3)**

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.

1. **Conflicts of Interest**

Tenderers must provide a clear statement with regard to potential conflicts of interests. Therefore, **please confirm within your tender submission** whether, to the best of your knowledge, there is any conflict of interest between your organisation and Cornwall Council or its programme 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 Cornwall Council 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.

**Enclosures.**

1. Summative assessment plan
2. Logic model
3. Cornwall Council’s standard consultancy agreement