**INVITATION TO TENDER (ITT)**

**Summative Assessment Project Evaluation Services**

**TEN 421: Version 050418**

**April 2018**

**1. About Cornwall Development Company**

Cornwall Development Company (CDC) is the arms-length economic development arm of Cornwall Council (CC) and is part of the CORSERV Ltd group of companies.

On behalf of CC, Cornwall & the Isles of Scilly Local Enterprise Partnership (LEP) and a range of stakeholders, CDC provides a bespoke, business facing service which helps deliver the economic vision and strategy for Cornwall.

**2. Background**

CDC has been successfully awarded contracts (see below) either as Lead Applicant or a delivery partner under the current European Structural and Investment Funds (ESIF). ESIF funding includes money from the European Social Fund (ESF), European Regional Development Fund (ERDF) and European Agricultural Fund for Rural Development (EAFRD).

This tender will be concerned with just three of the projects (the programme processes are outlined at Enclosures 1-3):

**2.1 Business Investment For Growth 2 (BIG2).**

This is a £4.387 million European Regional Development Fund (ERDF) contract by the Department for Housing, Communities and Local Government (DHCLG) with principal objectives to support some 200 businesses based in Cornwall and creates 360 jobs. The programme aims to invest in businesses with national and international growth opportunities by providing Gap funding ranging from £2,500 to a maximum of £75,000. The programme runs from January 2016 until December 2018.

**2.2. Invest In Cornwall (IIC)**

Invest in Cornwall is a £1.698 million ERDF contract with DHCLG which will promote positive perceptions of Cornwall and the Isles of Scilly as a place to do business running from October 2015 to September 2018. The objective is to see 36 new businesses locate in the region, creating 225 high quality jobs. This will be assisted by carefully marketing the Cornwall brand to national and international audiences within the smart specialisation sectors (Spacetech, Agritech, Marinetech, Aerospace, Healthtech and Creativetech) and then providing a high quality service to interested businesses to enable them to locate in the region.

**2.3 Cornwall and The Isles of Scilly Growth Hub (CIOSGH)**

The Growth Hub encourages and support businesses to grow, innovate and invest through a one-stop service for information and guidance on access to business support. They do this through a content-rich online portal and social media activity backed by a telephone and face-to-face service delivered by office-based Business Navigators and a team of experienced Senior Business Connectors covering Cornwall & Isles of Scilly.

**3. This Commission Overview**

CDC is seeking to appointa contractor to provide an ERDF Summative Assessment for each of the three projects (using a common approach) BIG2, IIC and Growth Hub in accordance with the ERDF Summative Assessment Objectives detailed in below for latest guidance:

• ESIF GN-1-033 - ERDF Summative Assessment Guidance (Enclosure 4)

• ESIF GN 1-034 - ERDF Summative Assessment (Enclosure 5)

• ESIF Form 1-014 – Summative Assessment Report Summary (Enclosure 6)

The summative assessments provide insights into programme performance, in order to:

• Enhance their implementation

• Provide reliable evidence of their efficiency, effectiveness and value for money

• Provide insights into what interventions work, reasons and lessons for the future

The summative assessments will help to understand the difference the programmes have made in the local economy, communities and beneficiary groups. In addition, they will improve the effectiveness of measures in relation to economic growth in the future.

The supplier will be expected to undertake a summative assessment and provide a full report together with a final summary in line with the requirements of this tender document and above ERDF guidance. (NB above guidance subject to change – suppliers are expected to check and comply with latest ERDF guidance as amended.)

Budget and Reporting for this tender is:

**BIG2** £20,000 (exc. vat but inclusive of all expenses)

Draft report by 31 October 2018

Final report by 30 November 2018

**IIC**  £20,000 (exc. vat but inclusive of all expenses)

Draft report by 31 July 2018

Final report by 31 August 2018

**Growth Hub** £20,000 (exc. vat but inclusive of all expenses)

Draft report by 31 July 2018

Final report by 31 August 2018

The contractor is to provide separate costs for each project which will reflect the common core summative assessment report and the project specific requirement detailed at 5.7.2; 5.8.2 and 5.9.2

**4. Tender and Commission Timetable**

This tender exercise will be conducted through Contacts Finder (https://www.gov.uk/contracts-finder)

|  |  |
| --- | --- |
| **Milestones** | **Date** |
| Tender Documents available on Contracts Finder | 16 March 2018 |
| Latest date for raising clarifications (by email) | 28 March 2018 |
| **Clarifications posted on Contracts finder by** | **5 April 2018** |
| **Deadline to return the Tender to CDC** | **13 April 2018** |
| Evaluation of Tender by CDC | 19 April 2018 |
| Award of Contract by CDC | 19 April 2018 |
| Inception (preferred bidder) meeting | 23 April 2018 |

**5. Specification of work to be undertaken by the Contractor**

**5.1 Scope of Assessment**

The supplier will be expected to undertake a programme evaluation and provide a final summative assessment report together with a summary report in line with the requirements of the ERDF summative assessment guidance and further requirements noted within tender document for each of the three programmes. Enclosures 7-9 are the existing programme ESIF-Form-1-011 ERDF Summative Assessment Logic Models and respective Programme Outputs are at Enclosures 10-12. These are subject to Programme Change Requests with DHCLG for approval. The change requests are for movement of budget and reduction of outputs. We would expect the successful bidder to encompasses these changes providing we have had DHCLG’s approval 2 months prior to delivery of the draft reports

The summative assessment will need to identify and attribute the change the programme has achieved. As detailed within the ERDF guidance, all assessments will need to cover the following key areas:

**5.1.1 Relevancy and consistency** of the programme - in light of any changes in policy or economic circumstances during its delivery period and appropriateness of programme design

**5.1.2 Progress** of the programme against contractual targets – any reasons for under / over-performance and expected lifetime results

**5.1.3 The experience of delivering and managing** the programme and lessons emerging from this

**5.1.4 The economic impact of the programme** – including intended and actual outcomes and impact

**5.1.5 Assessing value for money** and cost-effectiveness of the programme in light of its intended and unintended outcomes and impact therefore its value for money.

**5.1.6 Conclusions and lessons learnt:** Overall conclusions based on analysis of above areas

As noted in ERDF Programme Summative Assessment Guidance ESIF-GN-1-034 – Appendix F, the final summative assessment report will need to cover each of the above themes. From this guidance, CDC have listed (Sections 1 – 6) the key areas and questions relevant to our programme together with specific insights for each of the separate programmes which must form part of this assessment.

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.

## 5.2 Summative assessment final report structure

5.2.1 Section 1: Programme context: Design, Relevancy and consistency

The report will need to consider the economic and policy context in which the programme was designed, including the nature of the market failure, the programme objectives and the rationale for the delivery approach. This section should include critical analysis about the appropriateness of the programme’s design given its objectives.

It should consider whether there has been a change in this context and whether it has any implications for the practical delivery of the programme and the benefits which could be realised for beneficiaries and the local economy as a whole. The key questions that need to be explored here are:

* What was the programme seeking to do?
* What was the economic and policy context at the time that the programme was designed?
* What were the specific market failures that the programme was seeking to address? Was there a strong rationale for the programme?
* Was it appropriately designed to achieve its objectives? Was the delivery model appropriate?
* Were the targets set for the programme realistic and achievable?
* How did the context change as the programme was delivered and did this exert any particular pressures on programme delivery?
* Bearing in mind any changes in context or weaknesses in the programme design / logic model, can the programme reasonably be expected to perform well against its targets?
  + 1. Section 2: Programme progress

##### This section should consider the progress with the implementation of the programme, drawing in particular on annual and lifetime performance against the expenditure, activity and output targets. Variations from the targets should be carefully explained and supported by the available evidence. Progress against any horizontal principals (e.g. equality & diversity, sustainability etc. as defined by ESIF) and any explicit targets which were set should also be considered.

##### The key questions here are:

* Has the programme delivered what it expected to in terms of spend and outputs?
* What are the factors which explain this performance?
* When the programme draws to a close, is it expected to have achieved what it set out to?

The summative assessment will need to forecast the expected lifetime outturn for the programme and the assumptions which underpin the analysis. It is important that there is a clear distinction between the outcomes and impacts which have actually been realised and those which are predicted to arise in future years. For quantitative forecasts, the estimation method will need to be clearly explained.

5.2.3 Section 3: Programme delivery and management

##### This section of the summative assessment will need to provide a more qualitative analysis of the implementation of the programme. This should include procurement, selection procedures, delivery performance, governance and management. It needs to consider the elements of programme delivery which have gone well and, if necessary, the elements which have gone less well.

##### The key questions that the summative assessment will need to explore here include:

* Was the programme well managed? Were the right governance and management structures in place and did they operate in the way they were expected to?
* Has the programme delivered its intended activities to a high standard?
* Could the delivery of the programme have been improved in any way?
* Did the programme engage with and select the right beneficiaries? Were the right procedures and criteria in place to ensure the programme focused on the right beneficiaries?
* How are programme activities perceived by stakeholders and beneficiaries? What are their perceptions of the quality of activities / delivery?
* To what extent have the horizontal principles (e.g. equality & diversity, sustainability etc. as defined by ESIF) been integrated into and shaped delivery?

5.2.4 Section 4: Programme outcomes and impact

##### The analysis here will need to set out the progress that the programme has made towards outcomes and impacts. This section should also provide conclusions about the contribution that the programme has made to any ERDF programme result indicators which are identified as relevant to the programme.

##### The overarching question that this section will need to explore is whether or not the programme has made a difference. In answering this critical question, programmes will need to consider:

* What progress has the programme made towards achieving the outcome and impacts (both qualitative & quantitative)?
* To what extent are the changes in relevant impact and outcome indicators attributable to programme activities?
* What are the additional economic, social and environmental benefits of the programme (where relevant and applicable to programme activities)?
* What are the main sources of Strategic Added Value that the programme has created?

5.2.5 Section 5: Programme value for money

##### Drawing upon the analysis in the impact assessment section, this section of the summative assessment report will need to provide a clear analysis of the value for money that the programme has provided. This may be benchmarked against other similar interventions where appropriate / relevant.

5.2.6 Section 6: Conclusions and lessons learnt

##### As per the characteristics and analysis contained within the rest of the summative assessment report. It is suggested that the conclusions are structured around identifying the strengths and weaknesses of the programme. They should also highlight specific lessons for the following audiences:

* Cornwall Development Company
* Those designing and implementing similar interventions
* Policy makers

##### The conclusions must be objective and constructive and wholly evidenced by the analysis within the summative assessment report.

5.2.7 Specific Insights required for BIG2 programme

Within the above report, the summative assessment should also cover specifics insights into delivery and outputs of the BIG2 programme including:

5.2.7.1 Effectiveness of Processes and Programme Administration

Although the systems utilised were largely at the discretion of BIG2, certain rules include those laid out by the ESIF and DHCLG. We are interested to know if they affected the performance of the Project

* Processes by which the programme is marketed and promoted.
* Effectiveness and accuracy of data collection and recording.
* Steering Group composition - how effective was the Group given its remit and was it reflective of businesses and stakeholders?
* Clarity of and changes to rules – if applicable, how effectively were these communicated and implemented on the Project?
* Ineffective or bureaucratic rules – analysis of what rules or procedures were in themselves a barrier to achievement.
* Support – were BIG2 staff readily available to provide advice, guidance and interpretation of rules and procedures?
* Applicants – how effective were applicants in working with BIG2 including in responding to requests and deadlines?

5.2.7.2 User perception and involvement

This relates to the end-user – the recipient of BIG investment funding – and their perception not only of the Project and what they felt it was trying to achieve but also identifying the quality of their submissions. The latter seeks to understand whether the process was perceived as difficult or user friendly based on the way the Project was designed and/or the attitudes and quality of bids put forward by the applicants:

• Applicants – did the applicant businesses clearly meet the eligibility criteria and were capable and willing to grow?

• Applications – what was the standard of bids from applicants and did they require extra support to meet a minimum standard?

• Application process – was it perceived as user friendly or a hindrance to awarding investments?

• Procurement – linked to the above, was the procurement process and guidance clear and did it impede progress?

• Decision making process – were decisions reached in a timely fashion? In particular, was the opportunity to present applications (those seeking more than £20,000) to the Investment Panel seen as a positive introduction?

5.2.7.3 Outcomes and reach by sector and area

• Geography – the Project covers all of Cornwall. How effective was the Project in its geographical coverage and were the benefits felt evenly across the county?

• “Reach” of the investments – how effective was the project in investing in businesses that might not have applied for funding before. Did the project take action to ensure that its “reach” went beyond those that have sought and secured grants previously

• Businesses Sectors – to assess the range of businesses in receipt of investments with a particular focus on the different sectors that benefitted.

5.2.7.4 Lessons for the future

Comment on BIG2’s work as well as that of the Investment Panel and Steering Group - recording any innovations that were introduced. For example, if any procedures were simplified to make it easier for participants:

* Response to suggestions - did the project evolve and develop as a result of suggestions for improvement from stakeholders and applicants? Was there a culture of continuous improvement?
* Investment Panel – composition and appropriateness of its membership, frequency of meetings, and record keeping (minutes) for decisions.
* Presentation of projects – did it help or hinder decision making to have applicants present their project applications to the Investment Panel and did it benefit and strengthen the businesses in question as a result of the experience?
* Steering Group – composition of its membership, frequency of meetings and how effectively it “steered” the Project and gave advice to BIG2.
* Structure – was the way that the Project was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?
* Recording – including accuracy of figures and efficiency of procedures.
* Reporting procedures – including effectiveness and user friendliness.
* Help and support – accessibility, readiness and helpfulness of BIG2 staff. Did applicants feel that they had a nominated contact at BIG2 to speak to when there were queries?
* Interaction – how effective was the co-ordination between BIG2 and other relevant CDC departments
* Publicity and marketing – assessing achievements, frequency, quality and level of co-ordination.
* Cross cutting themes – progress made in relation to Equality and Diversity and Sustainability as part of the application process and how this was reflected in the information gathered and reports submitted.

5.2.7.5 Effectiveness of project administration

Comment on BIG2’s work as well as that of the Investment Panel and Steering Group - recording any innovations that were introduced. For example, if any procedures were simplified to make it easier for participants:

* Investment Panel – composition and appropriateness of its membership, frequency of meetings, and record keeping (minutes) for decisions.
* Presentation of projects – did it help or hinder decision making to have applicants present their project applications to the Investment Panel and did it benefit and strengthen the businesses in question as a result of the experience?
* Steering Group – composition of its membership, frequency of meetings and how effectively it “steered” the Project and gave advice to BIG2.
* Structure – was the way that the Project was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?
* Recording – including accuracy of figures and efficiency of procedures.
* Reporting procedures – including effectiveness and user friendliness.
* Help and support – accessibility, readiness and helpfulness of BIG2 staff. Did applicants feel that they had a nominated contact at BIG2 to speak to when there were queries?
* Interaction – how effective was the co-ordination between BIG2 and other relevant CDC departments Publicity and marketing – assessing achievements, frequency, quality and level of co-ordination.
* Cross cutting themes – progress made in relation to Equality and Diversity and Sustainability as part of the application process and how this was reflected in the information gathered and reports submitted.

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5.2.8 Specific Insights required for IIC programme

Within the above report, the summative assessment should also cover specifics insights into delivery and outputs of the IIC programme including:

5.2.8.1 Effectiveness of Processes and Programme Administration

Although the systems utilised were largely at the discretion of IIC, certain rules include those laid out by the ESIF and DHCLG. We are interested to know if they affected the performance of the Project

* Processes by which the programme is marketed and promoted.
* Effectiveness and accuracy of data collection and recording.
* Steering Group composition - how effective was the Group given its remit and was it reflective of businesses and stakeholders?
* Support – were IIC staff readily available to provide advice and guidance to enable a decision to locate in Cornwall?
* Effective targeting of markets to enable a good pipeline of inward investors leads

5.2.8.2 User perception and involvement

This relates to the end-user – the recipient of IIC support – and their perception not only of the Project and what they felt it was trying to achieve but also identifying the quality of any intervention / support provided.

• Client registration process – was it perceived as user friendly or a hindrance to encouraging inward investment?

* Intervention / Support provided – was it perceived as appropriate, user friendly and made in a timely fashion

• Was there an appropriate use of Cornwall business brand ambassadors to encourage inward investors and to challenge perceptions of Cornwall as a business location?

5.2.8.3 Outcomes and reach by sector and area

• Website- To what extent did the website serve as a useful resource for inward investors/stakeholders?

5.2.8.4 Lessons for the future

Comment on IIC’s work as well as that of the Steering Group:

* Response to suggestions - did the project evolve and develop as a result of suggestions for improvement from stakeholders and applicants? Was there a culture of continuous improvement?
* Steering Group – composition of its membership, frequency of meetings and how effectively it “steered” the Project and gave advice to IIC.
* Structure – was the way that the Project was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?
* Recording – including accuracy of figures and efficiency of procedures.
* Reporting procedures – including effectiveness and user friendliness.
* Help and support – accessibility, readiness and helpfulness of IIC staff. Did applicants feel that they had a nominated contact at IIC to speak to when there were queries?
* Interaction – how effective was the co-ordination within IIC between other stakeholders and business support teams.
* Publicity and marketing – assessing achievements, frequency, quality and level of co-ordination.
* Cross cutting themes – progress made in relation to Equality and Diversity and Sustainability as part of the application process and how this was reflected in the information gathered and reports submitted.

5.2.8.5 Effectiveness of project administration

Comment on IIC’s work as well as that of the Investment Panel and Steering Group - recording any innovations that were introduced. For example, if any procedures were simplified to make it easier for participants:

* Steering Group – composition of its membership, frequency of meetings and how effectively it “steered” the Project and gave advice to IIC.
* Structure – was the way that the Project was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?
* Recording – including accuracy of figures and efficiency of procedures.
* Reporting procedures – including effectiveness and user friendliness.
* Help and support – accessibility, readiness and helpfulness of IIC staff. Did applicants feel that they had a nominated contact at IIC to speak to when there were queries?
* Interaction – how effective was the co-ordination within IIC between other stakeholders and business support teams.
* Publicity and marketing – assessing achievements, frequency, quality and level of co-ordination.
* Cross cutting themes – progress made in relation to Equality and Diversity and Sustainability as part of the application process and how this was reflected in the information gathered and reports submitted.

5.2.9 Specific Insights required for CIOSGH programme

Within the above report, the summative assessment should also cover specifics insights into delivery and outputs of the CIOSGH programme including:

5.2.9.1 Effectiveness of Processes and Programme Administration

• Management Board – composition of its membership, frequency of meetings and how effectively it “steered” the Project.

• Structure – was the way that the Project was structured an effective delivery model for achieving its outcomes. Did it help or hinder progress?

• Systems and Processes- effective/fit for purpose?

• Recording – including accuracy of figures and efficiency of procedures.

• Reporting procedures – CDC, CC, LEP and BEIS- including effectiveness and user friendliness.

• Help and support – accessibility, readiness and helpfulness of Navigators (phone) and Connectors (face to face).

• Interaction – how effective was the co-ordination within CIOSGH between the partners.

• Publicity and marketing – assessing achievements, frequency, quality and level of co-ordination.

5.9.2.2 User Perception and Involvement

• Registration process – was it perceived as user friendly or a hindrance to access?

• Referral process – were referrals made in a timely fashion and with information required?

• Management Board composition - how effective was the Group given its remit and was it reflective of businesses and stakeholders?

• Response to suggestions - did the project evolve and develop as a result of suggestions for improvement from stakeholders and clients? Was there a culture of continuous improvement?

• “Reach” of the signposting – how effective was the project in linking with businesses that might not have engaged in EU support before. Did the project act to ensure that its “reach” went beyond those that have sought and secured support previously?

• Operation of the Outreach- How effective was the outreach project in connecting with businesses across Cornwall? To what extent did it uncover ‘new’ clients?

5.9.2.3 Outcomes and reach by sector and area

• Website- To what extent did the website serve as a useful resource for businesses in Cornwall?

• Quality clients – To what extent did the client businesses meet the eligibility criteria and were capable and willing to grow?

• Quality outcomes – to include an assessment of the registration, action planning and referral processes.

• Geography – How effectively the Project covered all of Cornwall and the Isles of Scilly. How effective was the Project in its geographical coverage and were the benefits felt evenly across the county and Isles of Scilly?

• Indirect benefits – what happened after the referral was made and to what extent were relationships forged to encourage support over time?

• How did the intelligence of working with many businesses help shape the support over the life of the project?

• Adding Value- Did to project add value to the business through business support and therefore initiate growth?

5.9.2.4 Lessons for the future

• Identify areas for improvement across marketing, cross cutting themes, recruitment, delivery and data recording.

• Working in partnership- what could have been done better in terms of the client journey ending in support from partners?

• Appropriateness of data collection

• Geography – the Project covers all of Cornwall and IoS. How effective was the Project in its geographical coverage and were the benefits felt evenly across the whole area?

**5.2.10. Approach**

Suppliers are encouraged to propose a range of methods in their tender to evaluate the programme in line with **the Scope of Assessment** noted above and the ERDF guidance. Methods must be in line with industry recommended best practise for this nature of assessment such as theory-based and/or counterfactual impact evaluation (CIE) or other industry-recognised or innovative methods. Suppliers are expected to include a degree of programme beneficiary interviews and case studies to ensure meaningful and relevant information and conclusions.

Suppliers will need to justify their proposed approaches, being particularly mindful of feasibility. For instance, the scope and timings of the programme may pose challenges to the use of comparison groups. Suppliers should consider whether comparison groups could be identified and how this would be done.

Within the proposal, suppliers will also need to demonstrate that they have taken into account:

* The scope and nature of the programme
* The characteristics and support of local economy
* The timings of the programme and summative assessment deadline and resources

**6 Corporate Requirements**

Cornwall Development Company has a statutory requirement to ensure compliance with a number of corporate considerations when delivering its services. It is therefore incumbent upon us to ensure that these statutory requirements are carried out by any contractor that is appointed by CDC. Consequently, we are looking for a commitment within Tender applications to assist CDC in the following duties. We do not consider that these requirements will be onerous and so pricing should not be affected in complying with any of these obligations, however, if a Tenderer believes there is a pricing impact, the impact of complying with these obligations should be clearly identified in their Pricing Schedule.

**6.1 Cross Cutting Themes (CCT)**

**6.1.1 Equality and Diversity**

We are committed to providing our services in a way which promotes equality of opportunity at every possibility. 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. **If successful you will be required to provide evidence of your equality and diversity policies/practices to ensure compliance with this.**

**6.1.2 Environmental Issues**

We are 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 regards to environmental issues. **If successful you will be required to provide evidence of your environmental sustainability policies/practices to ensure compliance with this.**

**6.2 Freedom of Information Legislation**

CDC may be obliged to disclose information provided by bidders in response to this Tender under the Freedom of Information Act 2000 and all subordinate legislation made under this Act and the Environmental Information Regulations 2004 (“the Freedom of Information Legislation”).

Bidders should be aware that the information they provide could be disclosed in response to a request under the Freedom of Information Legislation. CDC will proceed on the basis of disclosure unless an appropriate exemption applies. Bidders should be aware that despite the availability of some exemptions, information may still be disclosed if it is in the public interest.

**6.3 Prevention of Bribery**

Applicants are hereby notified that Cornwall Development Company is subject to the regulations of the Bribery Act 2010 and, therefore, has a duty to ensure that all bidders will comply with applicable laws, regulations, codes and sanctions relating to anti-bribery and anti-corruption including but not limited to this legislation.

**6.4 Document Retention**

EU regulations require this project to retain all records and ensure all original documents relating to activity associated with this contract are retained until the licences have lapsed. Confirmation is required that CDC can still access the last backup of the system prior to the licence lapsing. If the database needs to be transferred out of the Zoho environment and to stand alone please detail how this will be achieved.

**6.5 Conflicts of Interest**

Please provide a statement with regards to a conflict of interest for this procurement through the provision of either:-

A Declaration that to your knowledge there is no conflict of interest between your company and the Cornwall Development Company or project 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 their impartiality and independence in the contexts of this procurement procedure.

Or

A Declaration that there is a likely conflict of interest between your company and the Cornwall Development Company or project 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 their impartiality and independence in the contexts of this procurement procedure, please provide details of this connection.

This will permit CDC, that in the event of a conflict of interest, appropriate steps are taken to ensure that the evaluation of any submission will be undertaken by an independent and impartial panel.

**6.6 Exclusion**

Cornwall Development company shall exclude applicants from participation in this procurement procedure where they have established or are otherwise aware that the applicant (including administrative, management or supervisory staff that have powers of representation, decision or control of the applicants’ company) has been the subject of a conviction by final judgment of one of the following reasons:-

Participation in a criminal organisation

Corruption

Fraud

Terrorist offences or offences linked to terrorist activities

Money laundering or terrorist financing

Child labour and other forms of trafficking in human beings

**6.7 Consortium or sub-contracting**

Tenderers should note that consortia can submit a tender but the sub-contracting of aspects of this commission after appointment will not be allowed.

**6.8 Health and Safety**

All relevant rules, procedures and statutory requirements concerning health and safety, including the Company's health and safety policy which shall be provided to the Supplier and if not so provided shall be requested by it.

The Supplier shall at all times comply with the requirements of the Health and Safety at Work Act 1974, the Management of Health and Safety at Work Regulations 1992 and all other statutory and regulatory requirements and the Company’s policies and procedures relating to health and safety copies of which are available on request.

**6.9 Indemnity and Insurance**

Without prejudice to its obligations under this Condition, the Supplier shall effect and maintain with reputable insurers such policy or policies of insurance as may be necessary to cover the Suppliers obligations and liabilities under this Condition, including but not limited to:

* Professional indemnity insurance with a limit of liability of not less than £1 million;
* Public liability insurance with a limit of liability of not less than £2 million;
* Employers liability insurance with a limit if liability of not less than £2 million;

For any one occurrence or series of occurrences arising out of any one event in the performance of this contract.

**6.10 Standard Terms and Conditions of Purchase of Goods and Services**

The supplier is to ensure that they provide within their Covering Letter agreement to the Standard Terms and Conditions including the Enclosures.

**7. Clarification**

There will not be any negotiations of any of the substantive terms of the Tender Documents. Only clarification queries will be answered. Any clarification queries arising from the Tender Documents which may have a bearing on the offer should be raised as soon as possible in writing. The deadline for clarification questions is as per the Tender Timetable at paragraph 4. All e-mailed queries should be sent to:-

Name: Nicky Pooley

**with the following message clearly noted in the Subject box; ‘Tender Ten 421 – Summative Assessment Project Evaluation Services Strictly Confidential ’**

E-mail: [finance@cornwalldevelopmentcompany.co.uk](mailto:finance@cornwalldevelopmentcompany.co.uk)

No representation by way of explanation or otherwise to persons or corporations tendering or desirous of tendering as to the meaning of the tender, Contract or other Tender Documents or as to any other matter or thing to be done under the proposed contract shall bind us unless such representation is in writing and duly signed by the Head of Corporate Services of Cornwall Development Company. All such correspondence shall be returned with the Tender Documents and shall form part of the Contract.

Tenderers must provide a single point of contact in their organisation for all contact between the Tenderer and Cornwall Development Company

Responses to any queries will be shared through the Contracts Finder portal (https://www.gov.uk/contracts-finder).

**8. Tender Application Requirements**

Tenders may be submitted in either paper or electronic form but must comply with all requirements within this tender brief. The submission should contain 2 parts; a Covering Letter and the ITT response.

8.1 The **covering letter** should set out the following (**Please note failure to supply a covering letter will constitute a fail in the scoring criteria set out in section 9)**;

* A single point of contact for all contact between the tenderer and CDC during the tender selection process, and for further correspondence.
* Confirmation that the tenderer has the resources available to meet the requirements outlined in this brief and its timelines
* Confirmation that the tenderer accepts all the Terms and Conditions of the Contract attached (Enclosure 13)
* Confirmation that the tenderer will be able to meet the Corporate Requirements (see Section 6) to include confirmation that Equality and Diversity and Environmental policies are in place and, if successful, supporting documentation will be provided as evidence
* Confirmation that the tenderer holds current valid insurance policies as set out below and, if successful, supporting documentation will be provided as evidence
* Conflict of interest statement

The **ITT response** must include the following supporting evidence;

8.2 Demonstrate how the contractor(s) will fully meet the requirements of this brief

8.3 CVs of the individuals who will be actively involved in delivering the report/service and who are costed into the tender. Please limit to 1 side of A4 per individual.

8.4 Details of previous relevant commissions delivered and/or activity undertaken by the individuals above, within last 3 years, with an explanation as to why this is considered to be relevant. Please limit to 2 sides of A4 in total.

8.5 The contractor is to provide separate costs for each project (BIG2, IIC & CIOSGH) which will reflect the common core summative assessment report and the project specific requirement detailed at 5.7.2; 5.8.2 and 5.9.2

**9. Tender Scoring, Evaluation and Award Criteria**

**Tender returns will be assessed on the basis of the following tender award criteria and any contract awarded as a result of this tender process will be in accordance with CDC’s standard terms and conditions (Enclosure 13).**

Each Tender will be checked for completeness and compliance with all requirements of this Invitation to Tender (ITT).

Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the following award criteria:

Tender Evaluation Criteria

|  |  |
| --- | --- |
| Section I: Covering Letter |  |
| * Acceptable covering letter including confirmation of the requirements detailed at 8.1 | Pass/ Fail |
| Section II: Proposal 8.2 Total 60 marks (as distributed below) |  |
| * Clarity and credibility of the proposal; * Understanding of the project and its objectives; * Proposed methodology. | 10  10  30 |
| Section III: The Team 8.3 Total 10 marks |  |
| Summary of the CVs of the people (1 page per CV) that would be working on the contract, including a breakdown of job roles. | 10 |
| Section IV: Experience 8.4  Total 10 marks |  |
| • Experience of similar projects. | 10 |
| Section V: Budget 8,5 Total 20 marks |  |
| Cost: the lowest bid will be awarded the full 20 marks. Other bids will be awarded a mark that is proportionate to the level of their bid in comparison to the lowest bid i.e;  Marks awarded = 20 x lowest bid / bid | 20 |

Assessment of the Tender

It is anticipated that the selection process will be carried out in one stage:

The reviewer will award the marks depending upon their assessment of the applicant’s tender submission and will use the following scoring to assess the response:

|  |  |  |
| --- | --- | --- |
| **Scoring Matrix for Evaluation Criteria** | | |
| **Score** | **Judgement** | **Interpretation** |
| 100% | Excellent | Exceptional demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services. Full evidence provided where required to support the response. |
| 80% | Good | Above average demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services. Majority evidence provided to support the response. |
| 60% | Acceptable | Demonstration of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services with some evidence to support the response. |
| 40% | Minor Reservations | Some minor reservations of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services with little or no evidence to support the response. |
| 20% | Serious Reservations | Considerable reservations of the relevant ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services with little or no evidence to support the response. |
| 0% | Unacceptable | Does not comply and/or insufficient information provided to demonstrate that there is the ability, understanding, experience, skills, resource and/or quality measures required to provide the goods/works/services with little or no evidence to support the response. |

**10. Tender Returns**

Tenders may be returned by email or post, or by delivery in person.

Tenders are to be returned by:-

Latest date to be returned: **13 April 2018**

Latest time to be returned: **5:00 pm (GMT)**

If submitting by **email,** tenders should be sent electronically to [finance@cornwalldevelopmentcompany.co.uk](mailto:finance@cornwalldevelopmentcompany.co.uk) with the following message **clearly noted in the Subject box; ‘Tender Ten 421 – Summative Assessment Project Evaluation Services Strictly Confidential -’**

Tenderers are advised to request an acknowledgement of receipt when submitting by email.

If submitting by post or in person, the Tender must be enclosed in a sealed envelope, only marked as follows:-

**‘Tender Ten 421 – Summative Assessment Project Evaluation Services -Strictly Confidential -’**

‘For the attention of Nicky Pooley, Head of Corporate Services’

Addressed to:

Cornwall Development Company

Tyncroft House, South Wheal Crofty Station Road, Pool, Redruth, Cornwall

TR15 3QG

The envelope should not give any indication to the Tenderer’s identity. Marking by the carrier will not disqualify the tender.

If delivery **by hand** please obtain an official Receipt at point of delivery

**11. Disclaimer**

The issue of this documentation does not commit Cornwall Development Company (CDC) to award any contract pursuant to the bid process or enter into a contractual relationship with any provider of the service. Nothing in the documentation or in any other communications made between CDC or its agents and any other party, or any part thereof, shall be taken as constituting a contract, agreement or representation between CDC and any other party (save for a formal award of contract made in writing by or on behalf of CDC).

Bidders must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their tender responses. Information supplied to bidders by CDC or any information contained in CDC’s publications are supplied only for general guidance in the preparation of the tender response. Bidders must satisfy themselves by their own investigations as to the accuracy of any such information and no responsibility is accepted by CDC for any loss or damage of whatever kind and howsoever caused arising from the use by bidders of such information.

Bidders shall be responsible for their own costs and expenses in connection with or arising out of their response. CDC reserves the right to vary or change all or any part of the basis of the procedures for the procurement process at any time or not to proceed with the proposed procurement at all.

Cancellation of the procurement process (at any time) under any circumstances will not render CDC liable for any costs or expenses incurred by bidders during the procurement process.

Enclosures:

1. BIG2 Process

2. IIC Process

3. Growth Hub Process

4. ESIF GN-1-033 - ERDF Summative Assessment Guidance (tenderer to check for the latest version)

5. ESIF GN 1-034 - ERDF Summative Assessment (tenderer to check for the latest version)

6. ESIF Form 1-014 – Summative Assessment Report Summary (tenderer to check for the latest version)

7. BIG2 ERDF Summative Assessment Logic Model

8. IIC ERDF Summative Assessment Logic Model

9. CIOSGH ERDF Summative Assessment Logic Model

10. BIG2 Outputs

11. IIC Outputs

12. CIOSGH Outputs

1. CDC’s Standard Terms and Conditions