**Invitation to Tender**

**Zoho Support Services**

**Cornwall Development Company**

**TEN514**

# 1. About Cornwall Development Company

Cornwall Development Company (CDC) is the economic development service

of Cornwall Council (CC) and is part of the Corserv Limited group of companies.

On behalf of CC, Cornwall & 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. We achieve this through the expertise and professional commitment of our staff covering a wide range of economic development activities.

# 2. Background and Context

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).

2.1. **The Cornwall & Isles of Scilly Growth Hub (CIOSGH)**

The CIOSGH project is funded by the European Regional Development Fund (ERDF), with match funding from Cornwall Council, Department for Business, Energy & Industrial Strategy (BEIS) and Cornwall & Isles of Scilly Local Enterprise Partnership (LEP). 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. It does this through a content-rich online portal and social media activity backed by a telephone and face-to-face service delivered by a team of experienced Business Connectors covering Cornwall & Isles of Scilly.

2.2 **Business Investment For Growth Productivity (BIG Productivity)**

BIG Productivity programme will support the transformation of the Cornish economy through co-investments in long term and sustainable business growth. BIG Productivity will build upon the strengths of the previous BIG and BIG 2 programmes, whilst also offering a more targeted and innovative approach towards enhancing the capabilities and growth of local SMEs to raise productivity, collaboration and competitiveness regionally and nationally. The programme is funded by the European Regional Development Fund ERDF funding and the programme aims to invest in growth projects brought forward by innovative, ambitious and well-managed Cornish based businesses; work in collaboration with partner institutions to enable local SMEs gain access to national and global markets and provide a targeted advisory service tailored to support service to work across key sectors and support enterprises with potential to grow. The advisory service will allow the recipients to adopt and utilise new technologies much quicker, expand their regional and national coverage and increase their overall productivity.

2.3. **Cornwall Trade and Industry (CTI)**

The CTI Programme, is funded by Cornwall Council and the European Regional Development Fund and exists to help grow Cornwall’s economy – focusing on three key themes; attracting innovative, high growth SME businesses to locate in Cornwall; marketing Cornwall as a progressive, viable place to do business, and, from 2018, supporting Cornwall based SME’s to export their products/services to new national and international markets. The CTI project is measured on three key outputs; inward investors secured in Cornwall, businesses supported through the export service and number of jobs created as a result of support received.

2.4 **Marine-i 2**

Marine-i 2 funded by Cornwall Council and the European Regional Development Fund and builds on the initial Marine-i project and provides business support around innovation for Cornish marine tech businesses. The project supports new business-led research, development and innovation (RD&I), using a range of activities to help businesses grow. Support is delivered through a wide programme of activities which follow a process of identifying key external drivers, defining specific challenges that businesses can address, establishing mechanisms for both collaborative and individual business innovation and utilising the existing knowledge-based assets and support organisations to support knowledge exchange.

2.6 **SUPERFAST 3**

Superfast Cornwall “Superfast 3 – Inclusive Growth” Programme, is funded by Cornwall Council and the European Regional Development Fund. The programme aims to assist businesses to develop and implement a digital solution to take their business forward. Alongside fully funded support from our Business Digital Consultants, the programme also offers grants for both broadband connections and business digital solutions such as new websites, e-commerce and digital technologies. Support is initially provided through an in-depth business assessment (min 12hrs) with one of our expert BDCs and, if a beneficial investment is identified, the business can apply for a grant to support up to 80% of related costs. In some cases where a business is clear about their plans and can justify the investment, SMEs can apply for the grant without using the business support. Grants will typically be between £1,000-6,000, and the upper limit will be subject to review.

2.9 **AeroSpace Cornwall 2**

AeroSpace Cornwall is a programme which promotes research, development and innovation (RD&I), funded by the European Regional Development Fund (ERDF) and Cornwall Council. AeroSpace Cornwall offers technical and commercial support for businesses across Cornwall and the Isles of Scilly who are developing new products, services and technologies which could add value to the space and aerospace sectors. The programme will support at least sixty businesses through grants and specialist business support whilst leveraging £1,375,639 of match funding from the private sector. It aims to increase the performance and competitiveness of local enterprises, create highly skilled jobs and launch new products into the marketplace; develop the ‘innovation ecosystem’ for the space and aerospace clusters by incentivising local businesses to collaborate with other businesses and research institutions to accelerate their innovation and increase the value and capability of the local space and aerospace clusters and secure ongoing investment in them.

2.10 **Community Led Local Development (CLLD)**

CLLD is funded by the European Regional Development Fund (ERDF), European Social Fund (ESF) and Cornwall Council and is a programme which is underpinned by the ‘trinity’ of Strategy, Partnership and Area as its foundation. CLLD is delivering a programme of community-led interventions targeted at the most deprived areas of Cornwall funded by ERDF and ESF. Support includes capital and revenue activity in accordance with priorities identified in the four Cornwall Local Development Strategies (LDS). The ultimate beneficiaries will be the people within deprived communities who live and work in the target CLLD areas. However, in the majority of cases the benefits will be delivered by businesses, community groups, social enterprises and other eligible organisations located or delivering activity that will benefit the CLLD areas as grant recipients through the CLLD Programme.

# 3. **Current status**

CDC has 2 existing separate Zoho Databases as detailed below:

3.1 CIOSGH (2.1)

The CIOSGH uses a Zoho One platform that has been developed over the last 5 years with 33 users. The database has some bespoke options to aid in the development of the delivery of the GIOSGH programme. Primarily this is to track the CIOSGH’s interaction with Small and Medium Enterprises (including Sole Traders) from initial point of contact through business diagnostics to provision of information or signposting to appropriate further business support, the production of reports for workflow management/reporting to stakeholders and maintenance/storage of client records for GDPR/audit purposes.

3.1.1 The CIOSGH uses the following apps within Zoho One but may adopt additional apps depending on future business needs and advice received:

1. CRM (with MS Outlook Add-in)
2. Sign
3. Social
4. Marketing Hub
5. Sales IQ
6. Showtime
7. Backstage
8. Survey
9. Vault

3.2 CDC (2.2 -2.10)

CDC has 50 active Enterprise Licences. Currently CDC only uses the CRM functionality with a limited Outlook add-on. The system has been developed to meet 3 specific requirements:

1. Management of Grants (See Enclosure 1 for the Blueprint of this process)
2. Tracking of interactions with SMEs to support the collation of evidence for 12 hours of support
3. Monitoring of enquires for Inward Investors to Cornwall and exports from Cornwall.

Each of the programmes has developed slightly different Zoho processes and reports to meet the specific needs of their programme. However, commercially available details such as company and contact details can be seen by all users but at the project level the data is restricted to the individual teams.

# 4. Tender requirements

The successful tenderer will be expected to undertake the following activities:

4.1 General

4.1.1 All the work carried out under this contract will be by a Project Tasking sheet which is to be agreed with the preferred supplier (an example is enclosed at Enclosure 2). The Project Tasking Sheet will only be submitted by CDC’s and CIOSGH’s nominated representatives which will be provided to the tenderer at the acceptance meeting. The sheet will contain details of the specific task, supporting documentation and details of how the task might relate to previous tasks. This will be sent to the contractor for costing. Once the task is agreed an email instruction will be sent confirming the contractor may proceed. In the event that the contractor is required onsite to implement any solution this will be identified in the tasking sheet. Tasks requiring less than 7 man hours to be completed within 5 working days from receipt of the confirmation email; 7-14 hour to be completed 5-10 days and greater than 14 hours by agreement but not normally longer than 20 working days. No work will be invoiced by the supplier unless supported by the agreed tasking sheet and confirmation email.

4.1.2 Business Continuity

The contractor should detail their arrangements for business continuity if there are circumstances that could threaten the on-going support for the CRM (eg, the contractor’s ability to trade).

4.2 CIOSGH

4.2.1 Understanding the current CRM system which has been bespoke built for and by CIOSGH

4.2.2 Review how other apps are currently used/applied within the Zoho One account and make recommendations for how these might improve the CIOSGH’s system

4.2.3  Review the current Zoho CRM system and with the CIOSGH team then identify and implement efficiencies/improvements.

4.2.4 Identifying, advising on and implementing, where necessary, new functionality and integration across the Zoho platform in discussion with CIOSGH team.

4.2.5 Providing consultancy/advice to the CIOSGH team on the Zoho platform

4.2.6 Providing relevant training to the CIOSGH on the Zoho platform and associated applications.

4.3 CDC

4.3.1 Understanding the current CRM system which has been developed for and by CDC. Reduce duplication and streamline existing processes.

4.3.2 Development of a new appraisal tracking process to be integrated into the standard grant process

4.3.3 Development of a claims tracking process to be integrated into the standard grant process

4.3.4 Development a process to allocate and track time spent supporting a client.

4.3.5 Review the current method of accounting for the individual programme Outputs and Outcomes and how these can be reconciled against the initial individual programme targets.

4.3.6 Review and develop new reports

4.3.7 Review how the current Outlook add-on has been implemented and determine if there is a better solution

4.3.8 Based on the above update the existing User Guidance and Report Guidance booklets. These will be provided to the successful tenderer.

4.3.9 Review the current BIG Productivity website and AeroSpace Cornwall website data import into Zoho CRM and recommend any improvements to the current import methodology.

4.3.10 Providing consultancy/advice to the CDC’s programme teams on the Zoho platform

4.3.11 Providing relevant training to the CDC programme team members on the Zoho platform and associated applications.

5**. Budget**

This will be a draw down contract based on a single blended hourly rate (including expenses and excluding VAT). It is expected that the majority of the meetings/training/presentations required to meet the delivery of this contract will be by Microsoft TEAMS. (CDC will only conduct online meetings using Microsoft TEAMS).

The total budget for this commission is a maximum budget of £40,000.00 including

expenses and excluding VAT.

# 6. Tender and commission timetable

The timescale of the programme is from the date of signing the contract until the 31 March 2023. The timetable for submission of the Tender is set out below.

|  |  |
| --- | --- |
| **Milestone** | **Date** |
| Publication of ITT  | 6 October 2021 |
| Final date for receipt of clarifications  | 12 October 2021 |
| Final date for response to clarifications  | 13 October 2021 |
| **Deadline to return the Tender to CDC** | **22 October 2021** |
| Evaluation of Tender by CDC - commencement | 25 October 2021 |
| Successful and unsuccessful tenderers notified | 26 October 2021 |
| Signed Contract  | 28 October 2021 |
| Project inception meeting | 28 October 2021 |

# 7. Tender submission 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 (7.1-7.9) and the ITT response.

The **covering letter** should set out the following;

7.1 Confirmation that you, the supplier, are able to meet the requirements outlined in the brief above.

7.2 Details of whom to contact in your company in relation to this tender

7.3 Confirmation that the tenderer will be able to meet the Corporate Requirements (see Section 9) to include confirmation that Equality and Diversity, Data Protection and Environmental policies are in place and, if successful, supporting documentation will be provided as evidence

7.4 Conflict of Interest statement as per 9.13

7.5 The Consultant shall provide confirmation that the relevant insurance policies detailed at 9.3 are current and if they are due to expire during the course of the commission to provide renewal notices prior to their expiry date(s).

7.6 Confirmation that the tenderer accepts all the Terms and Conditions of the Contract attached (Enclosure 3).

7.7 Confirmation that the Data will be held on servers based in the EU.

7.8 Confirmation that the contractor will sign the Data and information Agreement (Enclosure 4)

7.9 Your blended hourly rate inclusive of expenses and excluding VAT

7.10 Provide evidence that the consultant is a Zoho Certified Consultant

7.11 A proposal detailing how the contractor(s) will fully meet the requirements of this brief

7.12 CVs of your Project Manager and the 2 main Zoho Developers that will be primarily actively involved in delivering the service and who are costed into the tender. Please limit to 2 sides of A4 per individual.

7.13 Details of 2 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. Tender clarifications**

Any clarification queries arising from this Invitation to Tender which may have a bearing on the offer should be raised by email to:

nicky.pooley@cornwalldevelopmentcompany.co.ukin accordance with the Tender and Commission Timetable in section 6.

Responses to clarifications will be anonymised and uploaded by CDC to Contracts Finder and will be viewable to all tenderers.

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 CDC unless such representation is in writing and duly signed by a Director/Partner of the tenderer. All such correspondence shall be returned with the Tender Documents and shall form part of the contract.

9. **Corporate requirements**

CDC wishes to ensure that its contractors, suppliers and advisers comply with its corporate requirements when facilitating the delivery of its services. It is therefore necessary to ensure that the contractor can evidence their ability to meet these requirements when providing the services under this commission.

All Tender returns must include evidence of the following as pre-requisite if the Tender return is to be considered.

9.1 **Equality and Diversity**

CDC 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.

9.2 **Environmental Policy**

CDC 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.

9.3 **Indemnity and Insurance**

The contractor must effect and maintain with reputable insurers such policy or policies of insurance as may be necessary to cover the contractor’s obligations and liabilities under this contract, including but not limited to:

* Professional indemnity insurance with a limit of liability of not less than £2 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

All insurances shall cover for any one occurrence or series of occurrences arising out of any one event during the performance of this contract. The tenderer will be required to provide a copy of their insurance policies if successful in securing this contract.

In addition, the contract will be subject to the following legislation.

9.4 **Data Protection**

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.

9.5 **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 (Freedom of Information Legislation). Tenderers should therefore 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. Tenderers should be aware that despite the availability of some exemptions, information may still be disclosed if it is in the public interest.

9.6 **Prevention of Bribery**

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

9.7 **Health and Safety**

The tenderer must 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.

9.8 **Exclusion**

CDC shall exclude the tenderer from participation in this procurement procedure where they have established or are otherwise aware that the organisation, to include administrative, management or supervisory staff that have powers of representation, decision or control of the applicant’s 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

9.9 **Publicity**

In order to comply with the necessary publicity regulations that accompany ERDF funds all promotional material, meeting invites, questionnaires and reports must at all times comply with the latest guidelines. The Secretary of State has published the National European Structural and Investment Fund Publicity Guidance to assist grant recipients to comply with the Regulations referred to in the paragraph above. The chosen contractor will be required to agree all programme paperwork design with the programme manager at the start of the contract to ensure that the necessary conditions have been met. The appointed contractor must comply with the publicity requirements in all activities, events, and literature developed as part of this contract; the ERDF publicity requirements can be found at Enclosure 5.

9.10 **Sub-contracting**

Tenderers should note that a consortia can submit a tender but the sub-contracting of aspects of this commission after appointment will only be allowed by prior agreement with CDC.

9.11 **Content ownership**

By submitting a tender application, the tenderer acknowledges that the copyright to all material produced during the programme will be the property of CDC.

9.12 **Document Retention**

All documentation (electronic and hard copy) produced as part of this contract will need to be returned to CDC at the end of the contract so that we can retain them for future reference/audit. The contractor will not be expected to store these documents for future reference.

9.13 **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 CDC 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 CDC 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.

# 10. Tender evaluation methodology

Each Tender will be checked for completeness and compliance with all requirements of the ITT. Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the award criteria.

**Tender returns will be assessed on the basis of the following tender award criteria**

|  |  |
| --- | --- |
| Ref 7.1 Covering Letter |  |
| Acceptable covering letter including confirmation of the requirements detailed at 8.1 | Pass/ Fail |
| Ref 7.11  | 15 marks |
| • Clarity and credibility of the proposal;• Understanding of the project and its objectives;• Proposed methodology. |  |
| Ref 7.12 | 30 marks |
| CVs of your Project Manager and the 2 main Zoho Developers that will be primarily actively involved in delivering the service and who are costed into the tender. Please limit to 2 sides of A4 per individual. |  |
| Ref 7.13 | 30 marks |
| Details of 2 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. |  |
| Ref 7.9 Budget | 25 marks |
| The lowest blended hourly rate bid will be awarded the full 25 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 = 25 x lowest bid / bid |  |

11**. Assessment of the Tender**

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

|  |
| --- |
| **Scoring Matrix for Award 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. |

During the tender assessment period, CDC reserves the right to seek clarification in writing from the tenderers, to assist it in its consideration of the tender. Tenders will be evaluated to determine the most economically advantageous offer taking into consideration the award criteria weightings in the table above.

CDC is not bound to accept the lowest price or any tender. CDC will not reimburse any expense incurred in preparing tender responses. Any contract award will be conditional on the Contract being approved in accordance with CDC’s internal procedures and CDC being able to proceed.

12**. Tender Award**

Any contract awarded as a result of this tender process will be in accordance with the attached CDC standard terms and conditions (see Enclosure 3). It is expected the majority of the delivery of this commission will be in the first 5 months (this will be discussed at the inception meeting).

# 13. Tender returns

Please submit the Tender document by email by 17:00 on 22 October 2021.

If submitting electronically, please send by email to

tenders@cornwalldevelopmentcompany.co.uk with the following wording in

the subject box: “Tender TEN514 Strictly Confidential Zoho Support Services”

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

# 14. Disclaimer

The issue of this documentation does not commit CDC to award any contract pursuant to the tender 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).

Tenderers must obtain for themselves, at their own responsibility and expense, all information necessary for the preparation of their tender responses. Information supplied to the tenderers by CDC or any information contained in CDC’s publications is supplied only for general guidance in the preparation of the tender response. Tenderers 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 tenderers of such information.

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 tenderers during the procurement process.

# 15. Enclosures

1. Blueprint for AeroSpace Cornwall

2. Zoho CDC\_Contractor Tasking sheet draft

3. CDC Terms and Conditions over 25K Jan 19 formatted

4. Information and Data Agreement blank

5. ESIF-GN-1-005\_ESIF\_Branding\_and\_Publicity\_Requirements\_v8