



Business Ready Growth Specialist Pool - Procurement

Introduction

The University of Warwick Science Park (UWSP) in partnership with Warwickshire County Council (WCC) is looking to appoint a pool of growth specialist mentors, coaches and advisers for the provision of a “Business Ready Growth Specialist Pool” (BRGS) under a framework agreement.

The Business Ready Phase 2 (BR2) Programme is a European Regional Development Fund (ERDF) supported programme, and is an extension of an earlier successful programme. For further information see www.business-ready.co.uk

Purpose of this document

The first stage of this procurement requires suppliers to submit a tender. Shortlisted applicants achieving 65% of available marks and passing all mandatory criteria will be invited to attend stage two, which will comprise a presentation and interview in front of a panel. Final contract award will be made based on evaluation of the second stage.

The BR2 Programme is part funded by the European Regional Development Fund with further funding from Warwickshire County Council. The initial period of the programme is 1st July 2019 – 31st December 2021. However, we reserve the right to maintain the growth specialist panel for any future business support programmes delivered by UWSP up to a maximum permitted term of 4 years (periods up to 18 months beyond December 2021: 30th June 2023).

The procurement of Growth Specialists (BRGS) for Business Ready is following national guidelines for procurement of ERDF funded projects.



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Service description

Business Ready is an innovative business growth support package for tech-based, innovation-led and knowledge intensive businesses based in Coventry and Warwickshire. The programme is supporting micro and small enterprises with the characteristics and ambition for growth.

The programme offers a tailored package of demand-led specialist and practical support. This will be delivered through a combination of mentoring, coaching and workshops for business owners and managers to develop their expertise and understanding of:

- Targeted marketing strategies and costed plans
- Strategic & business expansion planning
- Preparing investment propositions and funding applications
- Financial Control, Planning and Forecasting
- Growing the team through structured recruitment and retention activity
- Leadership & Team development
- Access to and availability of specialist premises and resources
- Access to relevant sources of knowledge and expertise
- Networking – peer to peer opportunities with other local growth companies
- Access to a wider network of contacts & knowledge

Growth Specialist pool requirements

In order to deliver the Business Ready (BR2) services to ambitious, innovative local companies, UWSP wish to procure a pool of experienced mentors, coaches and advisers to support the programme delivery through client project based interventions, typically between 2-8 days of direct engagement which may be over a short or long period (up to 24 months).

It is anticipated that the growth specialist pool will comprise in total up to 25 individuals; each specialist may have expertise in more than one specialism but it is not anticipated that anyone individual will have more than three specialisms. All business growth specialists will have a proven track record in growing their own business and in supporting potential growth companies through their private work or previous programmes such as MAS, GrowthAccelerator or H2020/EASME.



UWSP are looking to recruit specialists with a pragmatic approach & expertise in one or more of the following fields. Where an application covers more than one specialism the business growth specialist should indicate the order of priority for which they wish to be considered in question A7:

- Access to Finance – equity, debt or grants
- Market research, marketing strategy and Planning
- Manufacturing
- Business & Sales development
- Recruitment and Talent Management
- Management, Leadership and Team building
- Strategic Planning for growth
- Innovation and new product development
- Technology commercialisation
- Digital Media
- Operational Management
- Strategic Planning
- Business Financial management
- Managing IP
- Product Design
- 5G networks and associated technologies
- Mobile communications
- SAAS systems and cloud based solutions
- IT systems and productivity tools

We anticipate cross sector expertise requirements, but are keen to recruit those with expertise in the following strategically important sectors:

- ICT and Technology
- Digital & Creative
- Advanced manufacturing
- Healthcare
- Culture and Tourism
- Logistics
- Professional and Financial Services

Growth Specialists, liaising with the UWSP Business Growth Adviser, will be expected to refer clients on to other specialist expertise within and external to BR2, ensuring referrals are accurately recorded on project documentation.



Contractual issues

The names and specialism/sector expertise of each business growth specialist will be recorded in a table. The table will be used by the UWSP business growth advisers to identify specialists with the relevant expertise, skills and delivery capability to support the business growth of selected clients.

The UWSP growth advisor will assess the client needs. When there is more than one specialist with the appropriate skill set the client will be able to select their preferred specialists from the pool of specialists available. On occasion, clients may wish to speak with or meet specialists prior to choosing the one they wish to engage with.

On engagement, meeting dates and times will be directly agreed between client and specialist, usually during working hours. Any weekend or evening work is agreed between specialist and client but will not attract a premium rate.

There is no guarantee of any minimum number of days to be accessed from the pool; selection will be based on client requirements.

Growth Specialists accepted into the pool must attend a compulsory BR2 induction meeting prior to client engagement.

Service delivery will be based on a 7 hour delivery day. **Only client delivery time will be paid. Travel time and expenses will not be paid.**

Growth Specialists are asked to quote their fee rate for delivery.
A maximum hourly rate of £70 +VAT (if applicable) will be paid.

Any application with an hourly rate in excess of £70 will be disqualified from consideration.

Growth Specialists will be invited to attend further team and client recruitment events to extend their network and share skills, expertise and experiences.

A purchase order will be raised for each individual client engagement. Growth Specialists will be required to submit invoices for direct client engagement evidenced by client satisfaction signatures.

BRGS are required to produce accurately completed timesheets and outputs paperwork signed by the client on a monthly basis.



Paperwork must be supplied by the Growth Specialist on a monthly basis; 1 invoice and 1 timesheet per client per month. This documentation will be required before any invoices are paid. Correctly supplied invoices will be paid within 30 days.

BRGS may also be asked to assist with the following with no additional fees:

- Provide information for the production of case studies
- Support external promotion to stakeholder groups
- Provide information requested by an audit

It is anticipated that contracts will be raised with registered companies. If BRGS expect to deliver services as a sole trader or partnership, then evidence of an HMRC Unique Tax Reference (UTR) must be provided and the individual must meet the requirements of The University of Warwick Self Employed status assessment: otherwise payment will be made via the university payroll with deduction of applicable PAYE and NI.

BRGS are required to have insurance cover to the following levels:

- Public Liability £1,000,000
- Employers Liability(if applicable) £5,000,000
- Professional Indemnity £500,000

Please attach copies of your insurance certificates with your application or confirm that this will be in place before contracting commences.

All suppliers invited to join the BRGS pool will be asked to sign a contract stating their responsibilities towards:

- Health & Safety
- Anti-Bribery
- Data Protection
- Anti-Slavery
- Freedom of Information Act 2000

Copies of the contract will be made available on request.

For data privacy reasons BRGS may not use contact details of BR2 clients for own marketing communications and should refrain from adding BR2 clients to their respective marketing databases without consent.



Subcontracting

We are looking for a direct delivery model between client and engaged specialist, based on growth specialist skills, expertise and personality. Our model does not expect substitution. However, we are aware that some companies may bid for multiple specialists.

Where use of subcontractors is proposed, all company information requested and supplied herein should be given in respect of the prime contractor (the Supplier).

The names, addresses and background details of any subcontractor growth specialist the Supplier proposes to employ must be furnished with this tender application and UWSP must be notified of any change to this throughout the Contract.

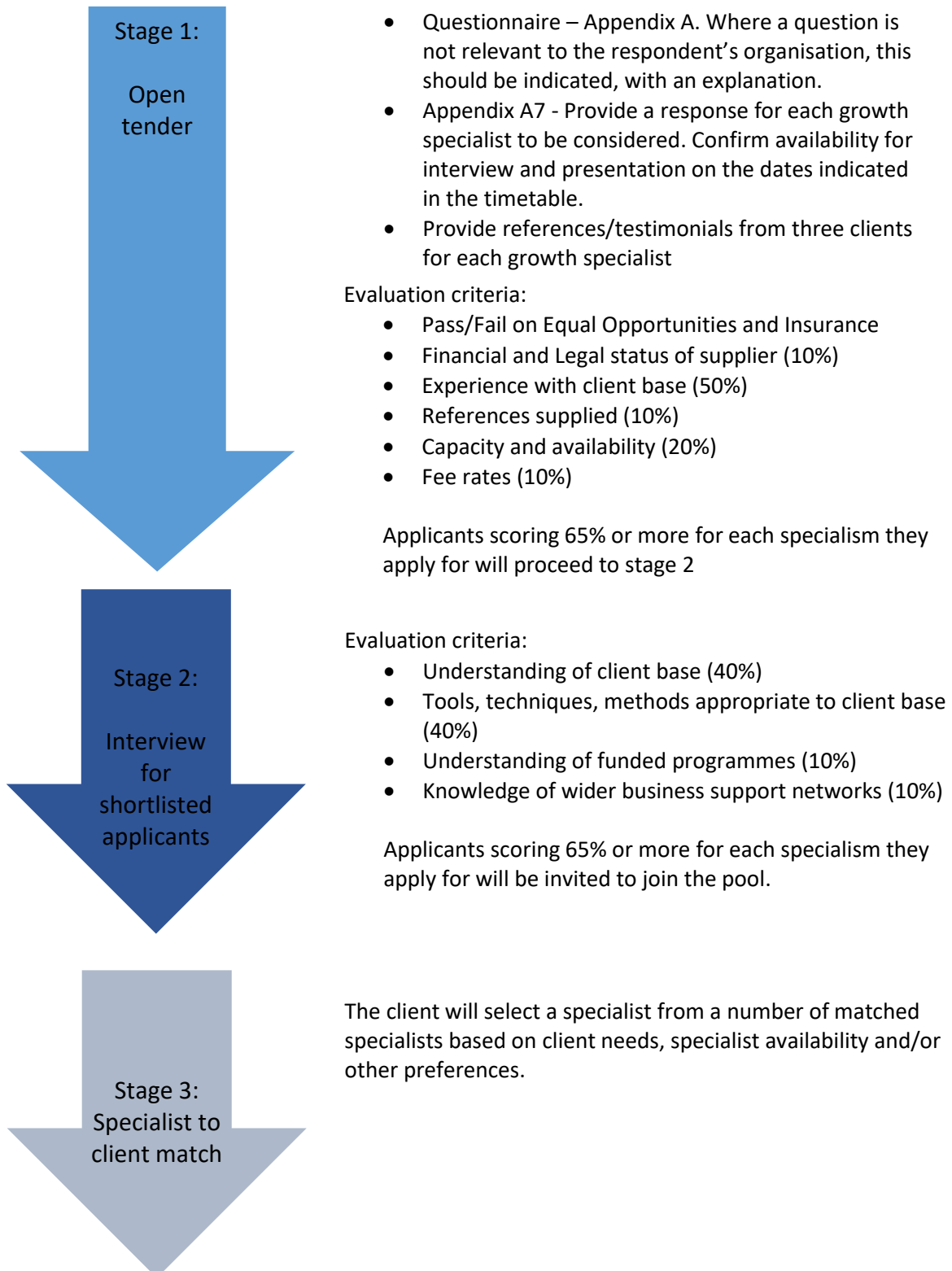
Suppliers must ensure payment to subcontractors of any undisputed invoices under this contract, within 30 days from the date on which the relevant invoice is regarded as valid and undisputed.

Please note, the prime contractor (the Supplier) must comply with the terms of the contract and will be liable for, and must ensure, the compliance of any of their subcontractors with the terms of the contract.

Please see application process below.

Application Process

There are three parts to this open tender procurement.





Applicants should refer to the service description issued as part of this document for further detail on the requirements of the BRGS.

Applicants should answer the questionnaire in Appendix A as fully, accurately and concisely as possible. Please provide a suitable response for each specialism to be considered if there is more than one proposed. Each specialism will be scored individually.

Each individual specialist shortlisted is required to attend an interview where they will be required to deliver a short presentation on a general SME topic. Shortlisted candidates will receive further information about the interview phase on 22nd May 2019 when they will also be informed of the subject on which they will be expected to present. Knowledge of their specialism/s will be assessed through questions specific to that specialism at the time of interview. Advance notice of those questions will not be provided.

It may be possible to arrange alternative dates for an interview where satisfactory evidence of unavailability is provided.

Failure to provide the required information, make a satisfactory response to any question, or supply documentation referred to in responses, within the specified timescale, may mean applicants will fail to meet the minimum requirement to progress to the next stage.

Completed applications **must be submitted no later than 4:00pm on Friday 3rd of May 2019** to the email address procurementgs@uwsp.co.uk - late submissions and postal submissions will not be considered.

Stage 1 Open Tender - Evaluation Criteria:

| Scoring Criteria | |
|------------------|---|
| 4 | <ul style="list-style-type: none"> • Meets minimum requirements and adds significant benefits • UWSP have no concerns regarding the financial and legal status • Excellent relevant experience with client base • Excellent references • Available at short notice and offers flexible hours |
| 3 | <ul style="list-style-type: none"> • Meets minimum requirements and adds some additional benefits • UWSP have minor concerns regarding the financial and legal status • Good relevant experience with client base • Good references • Good flexible working hours |
| 2 | <ul style="list-style-type: none"> • Meets minimum requirements • UWSP have a few concerns regarding the financial and legal status • Satisfactory relevant experience with client base • Satisfactory reference • Satisfactory availability |
| 1 | <ul style="list-style-type: none"> • Standard below minimum requirements – some reservations |
| 0 | <ul style="list-style-type: none"> • No response provided |

Stage 2 Presentation and Interview - Evaluation Criteria for each BRGS:

| Scoring Criteria | |
|------------------|--|
| 4 | <ul style="list-style-type: none"> • Provision of a high level of detail and key information which has allowed a thorough and extensive assessment • All information is specific, relevant and very well thought out • All of the issues raised by UWSP have been considered or addressed to a very good degree • The responses exceed all of UWSP's requirements • High level of evidence that applicant can exceed requirements with detailed explanations/evidence in support • UWSP has no concerns and has a high level of confidence in the applicant's proposals |
| 3 | <ul style="list-style-type: none"> • Provision of a good level of detail or key information which has allowed a thorough assessment • Responses give a detailed, specific and well thought out answer to the question • All of the issues raised by the UWSP have been considered and addressed to a good degree • The responses satisfy all and exceed some of the UWSP's requirements • Appropriate level of evidence provided to indicate that the applicant can satisfy the requirement • UWSP has no concerns and has a good level of confidence in the applicant's proposals |
| 2 | <ul style="list-style-type: none"> • Provision of a sufficient level of detail or key information which has allowed assessment • Information is generally specific to the tender • Responses answer the questions to an acceptable degree • All of the issues raised by UWSP have been considered or addressed to a satisfactory degree • The responses satisfy all of UWSP's requirements • There is evidence that the applicant can satisfy the requirement with minor reservations about ability to provide the service • UWSP has some minor concerns and has confidence in the applicant's proposals |
| 1 | <ul style="list-style-type: none"> • Very little information provided or key information omitted • Responses do not properly answer the questions • Very few of the issues raised by UWSP have been considered or addressed, or they have been poorly considered/addressed • The responses only satisfy a few of UWSP's requirements • There is some evidence that the applicant can meet some of the requirement, but limited information and/or significant weaknesses • UWSP has little confidence in the applicant's proposals |
| 0 | <ul style="list-style-type: none"> • No information provided and/or fundamentally unacceptable • Responses do not answer the questions • Responses do not consider/address the issues raised by UWSP • The responses do not satisfy any of the requirements • Non-Compliant – there is little or no evidence that the applicant can meet the stated requirements • UWSP has no confidence in the applicant's proposal |

| Stage 1 : Open tender - Evaluation criteria | Weighting |
|---|-----------|
| Financial and Legal status of supplier | 10% |
| Experience with client base | 50% |
| References supplied | 10% |
| Capacity and availability | 20% |
| Fee rates | 10% |

| Stage 2 : Interview - Evaluation criteria | Weighting |
|---|-----------|
| Understanding of client base (40%) | 40% |
| Tools, techniques, methods appropriate to client base | 40% |
| Understanding of funded programmes | 10% |
| Knowledge of wider business support networks | 10% |

Queries about the procurement

An information session will be held on 18th April to answer questions regarding the programme and the requirements for the pool. Interested applicants are invited to register their interest to attend by email to the address below; further information will be supplied in response.

If you cannot attend this event you may forward any questions you have about the procurement to the same email address.

Any queries or requests for clarification must be submitted in email correspondence to the to the email address procurementgs@uwsp.co.uk and be received by 25th April at 5.00pm

All questions and responses will be made available to all applicants; these will be published on the Business Ready website www.business-ready.co.uk in an anonymous form.

In the interests of transparency and fairness UWSP does not accept, and will not respond to any verbal requests for clarification or information outside of the information session.



Timetable

Following is an indicative timetable for those wishing to apply to join the pool:

| | |
|--|--|
| Advertise on website | 11 th April 2019 |
| Programme information meeting Warwick Innovation Centre CV34 6UW | 18 th April 2019 from 09:00 -13:00 |
| Final date for queries | 25 th April 2019 17:00 |
| Closing date for submissions of applications | 3 rd May 2019 16:00 |
| Applicants informed of outcome and, if successful, further details for stage 2 presentation/interview sent | 22 nd May 2019 |
| Presentation/interview dates for potential specialists Venture Centre, CV4 7EZ from 09:00 – 17:00 | 10 th , 11 th , 12 th , 13 th June (all 2019) |
| Applicants informed of outcome | 28 th June 2019 |
| Specialist induction meetings 2 sessions available – different locations | 2 nd July 2019 from 09:00 – 13:00 Binley Innovation Centre CV3 2TX 5 th July 2019 from 09:00 – 13:00 Warwick Innovation Centre CV34 6UW |
| Client engagements to commence | July 2019 |
| Client recording, impact measurement and publishing of case studies | July 2019 – December 2021 |



Appendix A – Questionnaire

A1. Business details

| | |
|--|--|
| Name of the organisation (or individual) in whose name the contract would be agreed: | |
| Principal contact name: | |
| Contact address: | |
| Telephone number: | |
| Mobile number: | |
| E-mail address: | |
| Company Registration number: | |
| Date of Registration: | |
| Registered address (if different from above): | |
| VAT Registration number: | |
| Website address: | |
| Sole trader or partnership: HMRC UTR (only required where company is unregistered) | |
| Does the business offer any additional services which may be appropriate to the client base: | |

A2. Legal Information

| | | |
|--|----|-----|
| Are there any court actions and/ or tribunal hearings outstanding or threatened against your organisation or your sub-contractors? | NO | YES |
| If Yes, please provide details: | | |
| Has your organisation or your sub-contractors been involved in any court action and/ or significant tribunals over the last three years? | NO | YES |
| If Yes, please provide details: | | |
| During the last three years, has your organisation had a contract terminated, failed to complete a contract to timescales, or had financial penalties imposed as a result of failure to meet deliverables. | NO | YES |
| If Yes, please provide details: | | |
| Have you or any of your employees or subcontractors been convicted of any of the following legal offences: | | |
| • participation in a criminal organisation; | NO | YES |
| • corruption; | NO | YES |
| • fraud; | NO | YES |
| • terrorism; | NO | YES |
| • money laundering; | NO | YES |
| • child labour or human trafficking. | NO | YES |
| • non-payment of taxes and social security contributions | NO | YES |
| If Yes, please provide details: | | |



A3. Financial Information

| | | |
|--|---|---|
| What was your turnover in the last two years? | £..... for year ending/...../..... | £..... for year ending/...../..... |
| Has your organisation or your subcontractors met all of its obligations to pay its creditors and staff during the past year? | NO | YES |
| If “No” please explain why not? | | |

A4. Equal Opportunities

Pass/Fail question – applicant must answer ‘Yes’ to pass

| | | |
|---|----|-----|
| Can you confirm that your organisation fully complies with the Equality Act 2010? | NO | YES |
|---|----|-----|

A5. Insurance

Pass/Fail question – applicant must have appropriate insurance in place, or confirm that it will be in place before contracting commences.

If currently available please provide copies of your public liability, employer’s liability and professional indemnity insurance. If currently unavailable please confirm this will be in place prior to contracting; applicants will be unable to commence any work until copies have been provided.

| | | | | | |
|------------------------|---|---------|-------------|-----------|--------------------------------------|
| | Please provide details of your organisation’s insurance protection. Please note the minimum requirements stated on page 6. | | | | |
| | Policy number | Insurer | Expiry date | Limit (£) | Will have in place prior to contract |
| Public liability | | | | | NO YES |
| Employers liability | | | | | NO YES |
| Professional Indemnity | | | | | NO YES |



A6. Pricing Schedule

It is mandatory to complete the table below. Failure to complete this question or making a bid in excess of £70.00, the highest rate permissible under this contract, will result in disqualification from consideration.

Fees are scored with a weighting of 10%.

The lowest cost bid will be given the maximum percentage weighting for the cost element (10%). All other bids will be evaluated against the lowest cost bid on a pro-rata basis.

The formula that will be used to do the evaluation is: -

$$(Lowest\ bid\ price / Applicant\ bid\ price) \times 10$$

| | |
|---|---|
| Fees for specialist services (hourly rate) | £ |
|---|---|

This fee element shall include the cost of all labour, equipment, materials and travel.

All Prices submitted must be **exclusive of VAT**

Signed

On behalf of

Date

A7. Growth Specialist (please complete for each specialist/specialism):

| |
|--|
| Name: |
| Does the specialist belong to any relevant professional or trade bodies? Please list |
| Does the specialist hold any relevant qualifications? Please list |
| Please detail the Growth Specialist’s relevant experience. (Please provide no more than 500 words). |
| Capacity and Availability Please indicate the maximum available days/hours per month and if available at short notice and/or offering flexible hours: |

| | | | | |
|--|-----------------|------------------|--------------|--------------|
| Are there any potential conflicts of interest that may arise from other existing contracts and/or relationships should the specialist be selected? | NO | YES | | |
| If Yes, please provide details: | | | | |
| Availability for presentation and interview on 10 Jun, 11 Jun, 12 Jun or 13 Jun 2019. Please indicate morning (AM) or afternoon (PM) preference (delete if unavailable). | 10 Jun AM | 11 Jun AM | 12 Jun AM | 13 Jun AM |
| | 10 Jun PM | 11 Jun PM | 12 Jun PM | 13 Jun PM |
| Availability for induction day | 2 Jul Binley | 5 Jul Warwick | | |

A8. References

Please include **three references/testimonials** from clients for each growth specialist, ensuring you have the client’s permission. These can be on letter headed paper, or an email from a registered company domain name. UWSP retains the right to contact a referee.