

## Business Growth Skills Workshop facilitators - Procurement

### Introduction

The University of Warwick Science Park (UWSP) in partnership with Warwickshire County Council (WCC) is looking to appoint a pool of facilitators who are specialists in their field and have proven expertise in face to face workshop design, delivery, and facilitation to SME tech based and innovative businesses. Successful applicants will be appointed to the programme under a framework call-off agreement.

The workshop schedule will be demand driven by requirements from clients recruited to the programme and will be promoted up to 6 months in advance to the wider pool of clients. Early indications are that there will be requirements for the workshop topics and categories detailed below.

The Business Ready Programme is partly funded by the European Regional Development Fund forming part of the Coventry and Warwickshire Business support programme. The programme end date is December 2018. However, we are currently bidding for an extension to the programme until 2021. If successful, there will be an opportunity to be retained under the framework for an additional 3 years.

### Purpose of this document

The questionnaire contained in this document forms the first stage of selecting applicants to participate in this procurement. Shortlisted applicants will then be invited to attend stage two for facilitated sessions and discussions.

The procurement of Business Growth skills workshop facilitators 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 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

## Workshop facilitator requirements

To deliver the Business Ready (BR) services to ambitious, innovative local companies, UWSP wishes to procure a team of facilitators to deliver face to face workshops through the duration of the programme.

Facilitators should have experience at developing new content as some clients may have bespoke requirements.

The workshops are targeted at specific Leadership and Management skills requirements for tech-based or knowledge-intensive businesses. They are intended to offer multi-company, peer group, interactive and case-based workshops and will be supported by on-going mentor activity with the clients.

It is anticipated that the workshop programme will involve 2- 4 workshops per month from August 2018 until the end of the programme. Workshops will take place across Coventry and Warwickshire. The workshops will be open to all clients recruited to the



Business Ready programme and also to clients who meet the basic eligibility criteria and are considering engagement with the programme.

The workshop schedule will be demand driven by requirements from clients recruited to the programme and will be promoted up to 6 months in advance to the wider pool of clients.

Early indications are that there will be requirements for the workshop topics detailed on page 5. However, we wish to engage with facilitators who are experienced at developing new content and could work with us to meet bespoke client requirements across a range of topics. The workshop programme will be flexible to reflect the changing needs of the BR clients and the business environment.

We will recruit facilitators who are specialists in their field and have proven expertise in face to face workshop design, delivery and facilitation to SME tech based and innovative businesses.

As our tech based clients are regular users of technology to support their business, we will select facilitators who have a basic understanding of supporting tools/technologies used by SME's to maximise productivity. For example, Trello for project management, Excel, Sage, Xero for accounts and finance, PowerPoint for presentations.



### Workshop categories and potential topics:

<p><b>Finance</b></p> <ul style="list-style-type: none"> <li>• Raising Finance (and understanding the options)</li> <li>• Effective Finance tools</li> <li>• Digital Marketing</li> <li>• Customer Service Managing Finance</li> <li>• Pitching for finance</li> </ul> <p><b>People and Personal Development</b></p> <ul style="list-style-type: none"> <li>• Effective recruitment</li> <li>• Building your team</li> <li>• Communication Skills for personal impact</li> <li>• Managing Performance in your team</li> <li>• Time management</li> <li>• Managing a team</li> <li>• Presentation skills</li> <li>• Talent Management (L&amp;D)</li> <li>• Leadership skills</li> </ul> <p><b>Innovation</b></p> <ul style="list-style-type: none"> <li>• From Idea to new product</li> <li>• New product development</li> <li>• Protecting your know-how (intellectual property, patents and Trade Marks)</li> </ul>	<p><b>Marketing and Sales</b></p> <ul style="list-style-type: none"> <li>• Channel management (effective routes to market and export)</li> <li>• From strategy to marketing plan</li> <li>• Customer Service Skills</li> <li>• Selling skills and processes</li> <li>• Negotiating Skills</li> <li>• Tenders/procurement application</li> </ul> <p><b>Strategic Planning</b></p> <ul style="list-style-type: none"> <li>• Strategic Planning Tools</li> <li>• Managing the board and investors</li> <li>• Partnership development and Collaboration management</li> <li>• International Trading</li> <li>• Preparing for Mergers and Acquisitions</li> </ul> <p><b>Operational</b></p> <ul style="list-style-type: none"> <li>• Managing IT, systems and data</li> <li>• Identifying and Managing Risk</li> <li>• Effective Governance</li> <li>• Agile/lean management</li> <li>• Project Management Skills</li> <li>• Supply Chain Management</li> </ul>
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### Contractual issues

The UWSP programme team will work with facilitators to schedule a series of workshops based on demand identified in the client Discovery and Assessment (DnA) exercise.

Dates and workshop content will be agreed with facilitators, subject to need.

While a facilitator may be accepted onto the framework panel, there is no guarantee that a facilitator will receive any purchase orders if expected demand is not achieved.



Workshop content and handouts will be delivered on material using only the Business Ready branding, ERDF logo and strapline, which will be supplied.

No indicators of other business delivery organisations should be made other than the name of the Facilitator(s).

For contracting reasons, following the delivery of a workshop, all rights to the workshop content will be fully vested in UWSP. The providing party will be free to use any such material they provided for their use and/or business but without reference to any endorsement from the Business Ready programme, or its sponsors.

The workshops will be based on a 3-hour delivery session for up to 15 delegates. Preparation time, handout costs, travel time and expenses will not be paid separately and should be quoted as a delivery cost.

A maximum fee for a 3-hour delivery session of £600 +VAT (if applicable) will be given.

A purchase order will be raised for each workshop delivery. It is the responsibility of facilitators to obtain signed attendance sheets from each workshop.

Workshop providers 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 supplier contracts will be raised with registered companies. If a workshop facilitator expects to deliver services as a sole trader or partnership, then evidence of HMRC Unique Tax Reference (UTR) must be provided, and the individual must meet The University of Warwick Self Employed status assessment or will be paid via the University payroll.

A supplier organisation is required to have Public Liability insurance (minimum £500,000) and Employers Liability (if applicable, minimum £1M). Please attach copies of your insurance certificates with your application.

For data privacy reasons workshop facilitators may not use contact details of workshop attendees for marketing communications and should refrain from adding workshop attendees to their respective marketing databases without consent.

### Subcontracting

Where use of sub-contractors is proposed, all information requested should be given in respect of the prime contractor (the Supplier).



The names and addresses of any sub-contractor facilitators the Supplier proposes to employ must be furnished with the tender and UWSP must be notified of any change to this throughout the Contract.

Suppliers must ensure payment to sub-contractors 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 sub-contractors with the terms of the contract.

All suppliers who are invited to join the pool of facilitators will be asked to sign a contract stating their responsibilities towards:

- Health & Safety
- Anti-bribery
- Data Protection
- Anti-slavery
- Freedom of Information Act 2000

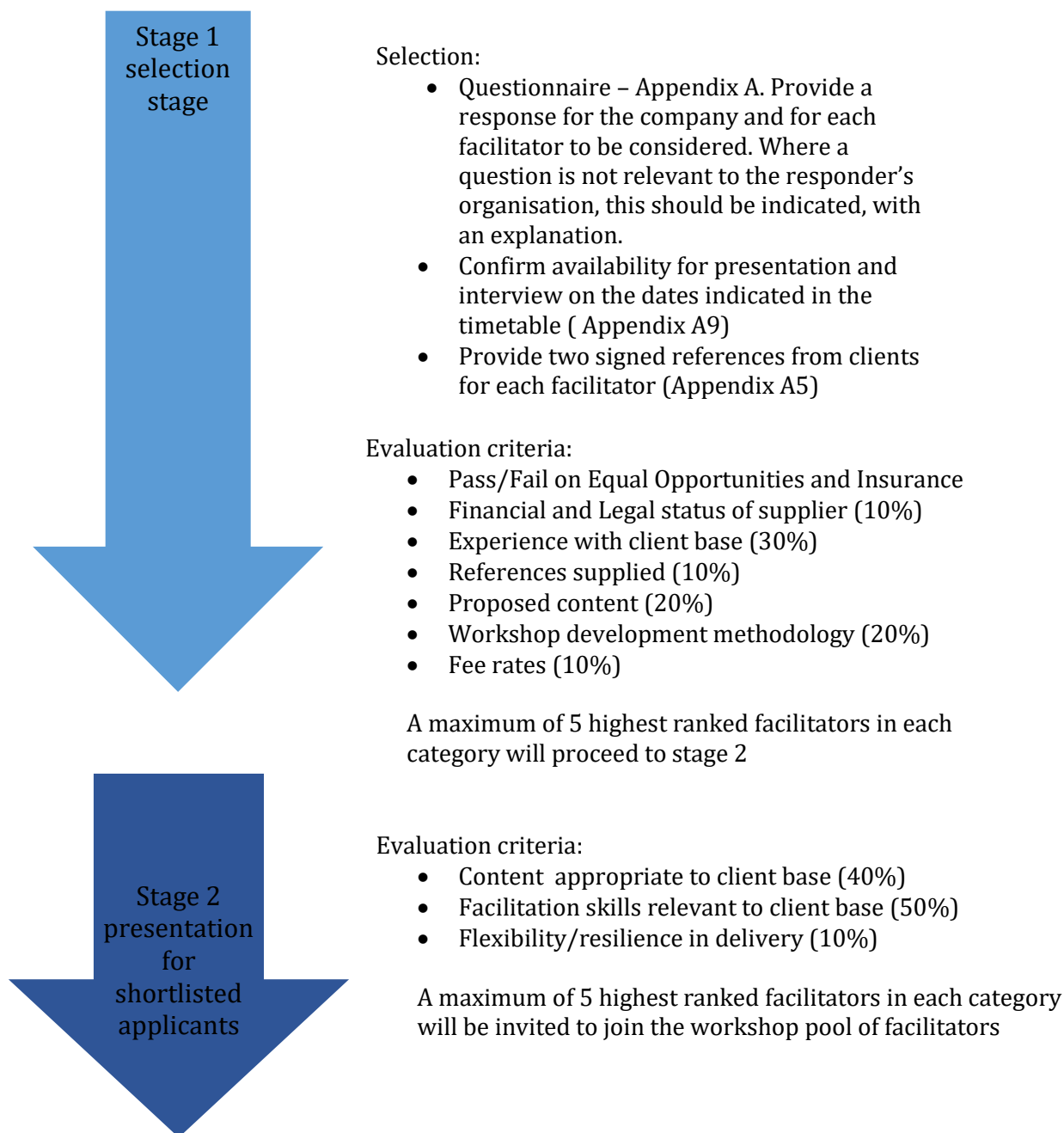
Copies of the contract will be made available on request.

Please see application process below.



## Application Process

There are two stages to this procurement.







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

Applicants should answer the questionnaire in Appendix A as accurately and concisely as possible, providing a response for each facilitator/workshop to be considered.

Each facilitator shortlisted is required to attend for an individual presentation and interview. It may be possible and necessary to arrange additional dates subject to panel availability.

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 that applicant will not be invited to participate further.

**Completed documents should be delivered by recorded delivery** to Pauline Brooks by **12<sup>th</sup> June 2018 at 4.00pm** at the following address :  
The Venture Centre, University of Warwick Science Park, Sir William Lyons Road,  
Coventry CV4 7EZ

### Stage 1 Selection stage - Evaluation criteria:

Scoring criteria	
4	Exceeds Requirements: UWSP have no concerns regarding the financial and legal status Excellent, relevant experience with client base Superb references Excellent workshop overview, content and tools Excellent description of course development methods
3	Meets minimum requirements and adds some additional benefits: UWSP have no concerns regarding the financial and legal status Good relevant experience with client base Good references Good workshop overview, content and tools Good description of course development methods
2	Meets minimum requirements: UWSP have no concerns regarding the financial and legal status Satisfactory relevant experience with client base Satisfactory references Satisfactory workshop overview Satisfactory description of course development methods
1	Standard below minimum requirements – some reservations



**Stage 2 Presentation and Interview - Evaluation criteria for each workshop/facilitator, will consider:**

Scoring criteria	
4	Provision of an excellent session: All content is specific and relevant and very well facilitated; All of the issues raised by UWSP have been considered or addressed to an excellent 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	Provision of a high-quality session and key information which has allowed a thorough and extensive assessment; Responses give a detailed, specific and well thought out answer to the questions; 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 The 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	Provision of a basic session and key information which has allowed assessment; Responses answer the questions to an acceptable degree; All of the issues raised by UWSP have been considered and addressed; There is evidence that the applicant may be able to satisfy the requirement; UWSP has some concerns in the applicant's proposals;
1	Reservations concerning ability to deliver services

## Queries about the procurement

Any questions must be submitted to [businessready@uwsp.co.uk](mailto:businessready@uwsp.co.uk) by 24<sup>th</sup> May 2018

All questions asked and all responses will be published on the UWSP and Business Ready websites in an anonymous form.

UWSP does not accept, and will not respond to any verbal requests for clarification/information.



## Timetable

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

Advertise on websites	7 <sup>th</sup> May 2018
Final date for queries	24 <sup>th</sup> May 2018
Closing date for submissions of applications	12 <sup>th</sup> June 4.00 pm
Applicants informed of outcome and further details for presentation/interview sent	25 <sup>th</sup> June 2018
Presentation/Interview dates for potential workshop/facilitators (Venue tbc)	5 <sup>th</sup> July, 9 <sup>th</sup> July, 10 <sup>th</sup> July
Applicants informed of outcome	w/c 6 <sup>th</sup> August
Facilitator induction meeting Venue tbc	22 <sup>nd</sup> August, 5 <sup>th</sup> September
Workshop delivery to commence	September 2018



## Appendix A – Questionnaire

<b>A1. Business Details</b>	
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 the above:	
VAT Registration number:	
Website address:	
Sole trader or partnership: HMRC UTR (only required where the business 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?
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?
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.
If Yes, please provide details:
Have any of your employees or sub-contractors been convicted of one of the following legal offences: <ul style="list-style-type: none"> <li>• participation in a criminal organisation;</li> <li>• corruption;</li> <li>• fraud;</li> <li>• terrorism;</li> <li>• money laundering;</li> <li>• child labour or human trafficking.</li> <li>• Non-payment of taxes and social security contributions</li> </ul>
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 sub-contractors met its obligations to pay its creditors and staff during the past year?		Yes / No
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?	Yes / No

### A5. References

Please include two references/testimonials from clients for each facilitator. This can be on letter headed paper or an email from a registered company domain name.

### A6. Insurance certificates

(Pass/Fail question – applicant must meet minimum criteria to pass)

Please provide copies of your public liability and employers liability certificates (if applicable).



### A7. Pricing Schedule

Pass/Fail question; it is mandatory to complete the table below. 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 then be compared against the lowest cost bid on a pro-rata basis. The formula that will be used to make the comparison is: -  
 $\text{price } 10\% \times (\text{lowest price}/\text{bid price})$

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

Fees for design, development and delivery per workhop	
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Please note rates exceeding £600 + VAT (if applicable) per workshop will not be considered

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

Signed .....

On behalf of .....

Date .....



## A8. Facilitator(s) (please complete for each facilitator):

For each facilitator:			
Name:			
Relevant qualifications:			
Please indicate the categories of topics, delivered by this facilitator:			
Finance		Strategy	
Marketing		Operational Management	
People & Skills		Innovation	
Please describe the type of experience delivering the workshop(s) to the client base.			
Please detail the method used by the facilitator to scope new workshop content to meet client needs.			
Please supply a workshop outline for examples of 3 hour workshops that would be delivered by this facilitator to an SME client base.			
This information should be provided as separate pages for each facilitator. Max 1 X A4 page per facilitator background and max 2 X A4 pages for workshop outlines.			





### Conflicts of Interest

Are there any potential conflicts of interest that may arise from other existing contracts and/or relationships should the workshop/facilitator be selected?	Y/N
If Yes, please provide details:	

### A9. Availability

Availability to conduct a presentation and interview on one of the following: 5 <sup>th</sup> July, 9 <sup>th</sup> July, 10 <sup>th</sup> July Please indicate morning or afternoon preference.
Availability for induction/planning day on either 22 <sup>nd</sup> August or 5 <sup>th</sup> September :