



**Dorset Local Enterprise  
Partnership**

**Tender Specification**

**Dorset Gateway:  
Custom Broker Services  
December 2019**

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## 1. BACKGROUND

- 1.1. Dorset Local Enterprise Partnership (LEP) has been awarded funds by the Department for Business, Energy and Industrial Strategy (BEIS) to provide a dedicated business support function for Dorset; this service currently operates under the name of Dorset Gateway.
- 1.2. The purpose of the Dorset Gateway is to be a free, central repository of information, advice and support for businesses within the county, providing them with a business support service and signposting to the most appropriate commercial or public funded assistance available to help them grow.
- 1.3. The Dorset Gateway seeks to do this in part through engaging a brokerage partner covering the whole of the county area.

## 2. BUDGET AND DURATION

- 2.1. The contract is to run from 1<sup>st</sup> April 2020 until 31<sup>st</sup> March 2021.
- 2.2. There will be an optional 12 month extension which would lead to a potential contract end date of 31<sup>st</sup> March 2022, which would be triggered by Dorset LEP. This will be subject to the value of the overall contract being under the OJEU procurement threshold for supplies and services contracts awarded by sub-central authorities.
- 2.3. Any extension will be subject to the agreement of both parties.
- 2.4. Any offer to extend the contract by a further 12 months will be made with a minimum of one month's notice, prior to the expiration of the existing original term.
- 2.5. The budget allocated is up to £80,000 per annum exclusive of any VAT charges that the supplier might incur.

## 3. OBJECTIVES

- 3.1 Dorset Gateway Brokerage Partner(s) will need to undertake the following actions:
  - Mapping of business support services
  - Provision of business information

- Business start-up and growth signposting
- Provision/facilitation of business networks
- Promotion of Dorset Gateway services
- Collaboration with local delivery and brokerage partners
- Signposting to and collecting business data specific to the UK's departure from the EU
- Providing information for Dorset Gateway's Customer Relationship Management (CRM) platform
- Evaluation of business support impact
- Production of customer case studies
- Collecting customer satisfaction data
- Any other necessarily required ancillary services

3.2 Dorset Gateway Brokerage Partner(s) will be an access point for brokerage to a wide range of business support services in the Dorset county area, which will include the provision of the following services:

- Events
- Training
- Business start
- Business growth, including Scale Ups
- Business planning
- Business finance
- Skills and training
- Sales and marketing
- Supply chains/procurement
- Innovation, research and development
- Product, service and process development
- Export and import
- Brexit support (local and national)
- Business networks
- Other

3.3 The supplier shall signpost businesses into the most appropriate support available from a wide range of local, national and commercial providers. It is then for the business to determine, from the information provided, which provider they select to provide services, using appropriate procurement and evaluation.

3.4 The supplier will be required to record all activity onto the Dorset Gateway's CRM system to ensure support for business through the service is coherent and that brokerage destinations and effectiveness can be monitored.

3.5 The supplier will collect, as a minimum, firm-level data for those businesses who receive 'medium' or 'high' intensity business support as detailed in **Annexe 1**.

- 3.6 The supplier shall utilise [www.dorsetgateway.co.uk](http://www.dorsetgateway.co.uk) or any other system as specified by the LEP for the online search and identification of appropriate services for business. This will be maintained by the Dorset Gateway with current information on services for businesses in a readily searchable format.
- 3.7 If suppliers directly deliver services to businesses, they must ensure and demonstrate to Dorset LEP's satisfaction that these services are considered equally alongside those of other providers when performing the services. Activity and performance will be subject to monitoring and scrutiny by Dorset LEP.
- 3.8 Suppliers will be required to use the Dorset Gateway brand and comply with the associated brand guidelines.

## 4. OUTPUTS

- 4.1. The following outputs, outcomes and service levels are required by the LEP by 31<sup>st</sup> March 2021 and will be subject of reports to Department for Business, Energy and Industrial Strategy (BEIS):
- 750 businesses recorded and engaged with initial (light touch support) diagnostic and brokerage;
  - 150 businesses brokered into external business growth services and provision (in total and with breakdown of service);
  - Of the 800 businesses engaged, 100 growth/potential growth businesses to receive an in depth diagnostic (medium intensity support) as agreed with Dorset LEP;
  - 50 businesses taking up external business growth services (high intensity support) and provision (in total and with breakdown of service);
  - 50 businesses reporting that they are better equipped for growth or have reported growth as a result of the support provided (in total and with breakdown by service);
  - Produce five case studies detailing the support and outcomes of customers who have received medium or high intensity support;
  - Liaising with the LEP around potential high growth businesses and scale-up businesses; and
  - 80% satisfaction from businesses receiving medium or high intensity business support.

## 5. CONTRACT MANAGEMENT AND MONITORING

- 5.1. The work will be overseen by Dorset LEP's Business Engagement and Dorset Gateway (BEDG) Manager and Dorset LEP's Performance and Investment Committee.
- 5.2. The supplier should nominate a dedicated point of contact to act as Contract Manager to oversee the work and liaise with and report into the BEDG Manager. This will include attendance at Dorset LEP's Performance and Investment Committee when required (dates of meetings will be provided) and updates in writing, including advising of any delays to the proposed timetable.
- 5.3. Dorset LEP requires a high level of accuracy in this piece of work, particularly in relation to the data and management information provided. The Contract Manager is responsible for ensuring the quality of the work and the accuracy of the information provided.

## 6. TIMETABLE

|  |  |
|--|--|
| Invitation to Tender                   | 17 <sup>th</sup> December 2019                 |
| Deadline for the submission of Tenders | 17 <sup>th</sup> January 2020 – 18:00 hrs      |
| Interviews                             | Week Commencing 27 <sup>th</sup> January 2020  |
| Appointment                            | Week Commencing 31 <sup>st</sup> January 2020  |
| Inception meeting                      | Week Commencing 10 <sup>th</sup> February 2020 |
| Contract start date                    | 1 <sup>st</sup> April 2020                     |

## 7. TENDER ASSESSMENT AND COMMISSIONING PROCEDURE

### 7.1. Tenders must include:

**Process - Explain the process for engaging businesses and moving them through the brokerage process.**

- A detailed account of the delivery proposal from engagement through the brokerage process, with supporting rationale
- A clear indication of any innovation you propose to use in the delivery model

**Engagement - How will you ensure you engage with the necessary amount of businesses?**

- Details of how you will engage with businesses and any innovative approaches you may have

**Systems - What systems will be in place to ensure businesses move from engagement on to diagnostic/brokerage?**

- An outline description of the systems your organisation will use to administer the service effectively and how they will be used to gather, analyse and act upon business needs
- NB: it will be a contractual requirement for the supplier(s) to use the Dorset Gateway's CRM system in addition to existing systems

**Resources - How will you ensure that you are able to offer all of the services listed in section 2 of the document?**

- The name of any individual/individuals who will work on the contract, their role, the amount of time to be spent on the work and a summary of their qualifications and relevant subject knowledge and experience. Full CVs are not required

**Price**

- A breakdown of costs under headings of staff, travel and subsistence, (and any other relevant costs where appropriate)

**Due diligence**

- Evidence of completing similar work
- Details of any conflicting or complementary work which you may be undertaking at the same time
- Confirmation of professional indemnity insurance, including amount of cover held
- Contact details for two references

## 7.2. Evaluation criteria

Supplier selection will be made at the discretion of Dorset LEP.

Scoring weightings are broken down as follows:

- Process – 20%
- Engagement – 20%
- Systems – 20%
- Resources – 20%
- Price – 10%
- Due Diligence – 10%

## 7.3. Scoring criteria

|                |   |
|----------------|---|
| 4 Excellent    | Proposal meets and, in some places, exceeds the required standard                                   |
| 3 Good         | Proposal meets required standard  |
| 2 Acceptable   | Proposal meets the required standard in most respects, but is lacking or inconsistent in others     |
| 1 Poor         | Proposal falls short of expected standard   |
| 0 Unacceptable | Completely or significantly fails to meet required standard or does not provide the relevant answer |

Dorset LEP reserves the right not to make any appointment.

# 8. TENDER GUIDANCE

## 8.1. Developing and submitting your quote

- Take the time to read and understand this document
- In particular, develop a strong understanding of the objective and outputs sections
- In structuring your response, consider how it will be evaluated
- If anything is unclear or you have any questions please direct these to our point of contact, Finn Morgan, via email in the first instance to [fmorgan@bournemouth.ac.uk](mailto:fmorgan@bournemouth.ac.uk)
- Your response must be submitted via email for the attention of Finn Morgan to [gateway@bournemouth.ac.uk](mailto:gateway@bournemouth.ac.uk) by no later than **18:00, 17<sup>th</sup> January 2020**
- Responses may be submitted at any time before the deadline but late responses will not be accepted under any circumstances

## **8.2. Conflicts of Interest**

Dorset LEP may exclude the supplier if there is a conflict of interest which cannot be effectively remedied. The concept of a conflict of interest includes any situation where relevant staff members have, directly or indirectly, a financial, economic or other personal interest which might be perceived to compromise their impartiality and independence in the context of the procurement procedure.

Where there is any indication that a conflict of interest exists or may arise then it is the responsibility of the supplier to inform Dorset LEP, detailing the conflict in the supplier response to Dorset Gateway Custom Broker Services Tender.

## 9. ANNEXE 1: FIRM-LEVEL DATA

The following tables set out the **minimum** data to be collected for all businesses benefiting from either “Medium intensity” or “High intensity” by the supplier.

### Business details and unique identifiers

|     | Type  | Format   | Notes  |
|-----|---|--|--|
| 1.1 | Contact name  | Free text<br>(no character limit)  |  |
| 1.2 | Contact e-mail address  | Free text<br>(no character limit)  |  |
| 1.3 | Contact telephone number  | Free text<br>(no character limit)  |  |
| 1.4 | Business name   | Free text<br>(no character limit)  | Validate with <a href="#">lookup service</a>   |
| 1.5 | Company Registration Number<br>(CRN)<br><br>Issued by Companies House | 8 digit number<br><br>or 2 upper case letters and 6 digits<br><br>e.g. 89675265<br><br>e.g. SL007945 | Find/validate with <a href="#">lookup service</a><br><br>If not a limited company and lookup failed, then leave blank<br><br>If company is being registered soon, collect this once registered |
| 1.6 | HMRC VAT Registration number (VRN)                                    | 9 digits<br><br>e.g. 123456789   | Found on business VAT certificate  |

|      |  |   |   |
|------|--|---|---|
|      | [only needed if no CRN reference is available]   |   | <p>Validate with <a href="#">lookup service</a></p> <p><a href="#">Find VAT service</a> from name</p> <p>If not VAT registered then leave blank</p>   |
| 1.7  | <p>HMRC employers PAYE reference number</p> <p>(not accounts office reference)</p> <p>[Only needed if CRN or VAT references are not available]</p> | <p>DDD/LDDDDD</p> <p>or</p> <p>DDD/LLDDDDD</p> <p>e.g. 135/A56789</p> <p>e.g. 135/AB56789</p> | <p>L = Letter (upper case)</p> <p>D = Digit</p> <p>Also called Employer reference</p> <p>It can be found on HMRC business ePAYE letters OR by asking an accountant</p> <p>If not employing anyone on payroll then leave blank</p> |
| 1.8  | Number of FTE employees at local business's office receiving support   | <p>Decimals allowed.</p> <p>e.g. 13.5</p>   | Full time, part time and subcontractors only  |
| 1.9  | Turnover (£)   | XXX,XXX   | Total income/sales  |
| 1.10 | Full address of local business's office receiving support  | <p>Free text</p> <p>(no character limit)</p>  |   |

|      |  |                                 |  |
|------|--|---------------------------------|--|
| 1.11 | Postcode of business local business's office receiving support | Free text<br>(max 8 characters) |  |
| 1.12 | Is this a multi-site business                                  | "Yes" or "no"                   |  |
| 1.13 | Brief description of what the business does                    | Free text<br>(100 words max)    | The product/service it delivers. The customers it serves.  |
| 1.14 | Growth/Scale-up potential                                      | Free text<br>(100 words max)    | Brief description of the firm's levels of ambition and potential to grow   |
| 1.15 | Month business started trading                                 | MM/YYYY                         | Month the business first started making sales<br><br>Provides an objective measure of the maturity of the business |

Note: In relation to unique business identifiers, Only one of CRN, VAT registration or PAYE reference number need be collected. For non-employers, who are not limited companies, and who are below the VAT threshold, all three fields can be left blank.

### Summary of support

|      | Type  | Format                            | Notes  |
|------|---|-----------------------------------|--|
| 1.16 | Cumulative length of interaction since very first contact with the Growth Hub | Hours (whole number digits)       | Roundup to nearest hour  |
| 1.17 | Summary of what support the business says it needs                            | Free text<br>(no character limit) | What is the nature of their enquiry and subsequent business need |

**Support given in each interaction (1 or more) - Separate spreadsheet cells for each interaction**

|      |                      |                                   |  |
|------|----------------------|-----------------------------------|--|
| 1.18 | Type of support      | Free text<br>(no character limit) | Brief description of the support given during an interaction.<br><br>Examples: Diagnostic, Referrals, Answer question, Ongoing support, Follow up.<br><br>A single interaction can involve several types of support. |
| 1.19 | Date of this support | DD/MM/YYYY                        | This is the date of interaction (not the date a referral is taken up).   |

**Referrals and signposting (0 or more) - Separate spreadsheet cells for each referral**

|      | Type                                      | Format                            | Notes   |
|------|---|-----------------------------------|---|
| 1.20 | <u>Name</u> of referral program / service | Free text<br>(no character limit) | Included all referrals of any kind made by the hub.                                     |
| 1.21 | <u>Purpose</u> of referral                | Free text<br>(no character limit) | e.g. developing management capabilities, access to finance, recruiting technical skills |
| 1.22 | Date of referral?                         | DD/MM/YYYY                        |   |
| 1.23 | Was the referral accepted and taken up?   | Free text                         | If known, please record whether a referral was  |

|      |                                      |                                   |  |
|------|--------------------------------------|-----------------------------------|--|
|      |                                      | (no character limit)              | <p>"accepted" or "not progressed".</p> <p>If pending, please record as "pending".</p> <p>If not known, please record as "unknown".</p> |
| 1.24 | Notes about this referral (optional) | Free text<br>(no character limit) |  |