



**DORSET**  
Local Enterprise Partnership



## Dorset Local Enterprise Partnership

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Business Advisory Services  
Consultancy Brief

June 2022

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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.
- 1.2. The purpose of this function is to be a free service offering advice and support for businesses within the county. This includes providing them with business diagnostics and signposting to the most appropriate commercial or public funded assistance available to help them grow.
- 1.3. Dorset LEP seeks to do this in part through engaging a business advisory service that provides one-to-one business diagnostics/reviews to SME businesses across Dorset. We plan to do this appointing a third-party supplier as part of a contracted service.

## 2. BUDGET AND DURATION

- 2.1. The contract is to run from 01 August 2022 until 31 March 2023.
- 2.2. There will be an optional 12 month extension which would lead to a potential contract end date of 31 March 2024, which would be triggered by Dorset LEP.
- 2.3. Any extension will be subject to the agreement of both parties and will require a new contract.
- 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 £24,999 per annum exclusive of any VAT charges that the supplier might incur.

## 3. OBJECTIVES

- 3.1 Businesses in Dorset, like most other businesses in the UK, are continuing to experience a range of challenges such as increased cost of energy, skills/workforce shortages and supply chain disruption. Whilst these issues provide challenges for businesses, there are also many opportunities that exist though local and national business growth and support programmes.

- 3.2 To help ensure businesses are well placed to get advice and support that is right for them, we want to provide them with one-to-one, tailored business diagnostics/reviews. We will appoint a third-party supplier to undertake this under contract.
- 3.3 The diagnostic/reviews should capture information such as:
- An evaluation of their business strategy and performance
  - Whether they are primed for growth and/or have plans for growth
  - What support they need to achieve their growth targets
  - Risk/continuity planning (e.g. GDPR, cyber security, health & safety, insurance, staff) – have they undertaken any?
  - Basic firm level business data such as turnover, employee numbers – see **Annexe 1**
  - Signposting to other local and national business support opportunities.
- 3.4 Each business taking part in a diagnostic/review would need to receive an output report summarising their current position and detailing challenges and opportunities. This data – assuming there is nothing commercially sensitive contained in it – would need to be shared with Dorset LEP for the purpose of reporting to BEIS.
- 3.5 Business referrals will be managed through Dorset LEP's business support portal and Customer Relationship Management (CRM) tool to which the supplier will have specific access for the purposes of the contract delivery. Access to the CRM will be provided by Dorset LEP.
- 3.6 The supplier will be required to record all activity onto the Dorset LEP's CRM system to ensure support for business through the service is coherent and that referral destinations and effectiveness of the service can be monitored.
- 3.7 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**.
- 3.8 Suppliers will be required to use the Dorset LEP 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 March 2023:
- Up to 100 business diagnostics/reviews – this figure will be determined by the proposed unit cost put forward by the supplier;

- five case studies detailing the support and outcomes of customers who have received support;
- Liaising with the LEP around potential high-growth businesses; and
- Minimum 80% satisfaction from businesses receiving support.

## 5. CONTRACT MANAGEMENT AND MONITORING

- 5.1. The work will be overseen by Dorset LEP's Business Engagement Manager (BEM).
- 5.2. The supplier must nominate a dedicated point of contact to act as Contract Manager to oversee the work and liaise with and report into the BEM. This will include some face-to-face meetings (either virtual or in person) and updates in writing, including advising of any service delivery issues.
- 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.
- 5.4. The supplier must be able to demonstrate that they have proven experience of working with businesses in an advisory capacity. In doing so, they must show examples of good customer engagement and feedback.

## 6. TIMETABLE

Invitation to Tender	20 June 2022
Deadline for the submission of Tenders	4 July 2022, 18:00 hrs
Interviews (if required)	Week commencing 11 July 2022
Appointment	Week Commencing 18 July 2022
Inception meeting	Week Commencing 25 July 2022
Contract start date	01 August 2022

## 7. TENDER ASSESSMENT AND COMMISSIONING PROCEDURE

### 7.1. Tenders must include:

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

- A detailed account of the delivery proposal from engagement through the business advisory process, with supporting rationale

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

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

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

- 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 LEP'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 such as staff time (including hourly rate), marketing, etc. 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; and
- 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 – 10%
- Systems – 10%
- Resources – 30%
- Price – 10%
- Due Diligence – 20%

## 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 [fmorgan@bournemouth.ac.uk](mailto:fmorgan@bournemouth.ac.uk) by no later than **18:00, 04 July 2022**.
- 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 this 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 (no character limit)	
1.2	Contact e-mail address	Free text (no character limit)	
1.3	Contact telephone number	Free text (no character limit)	
1.4	Business name	Free text (no character limit)	Validate with <a href="#">lookup service</a>
1.5	Company Registration Number (CRN)  Issued by Companies House	8 digit number  or 2 upper case letters and 6 digits  e.g. 89675265  e.g. SL007945	Find/validate with <a href="#">lookup service</a>  If not a limited company and lookup failed, then leave blank  If company is being registered soon, collect this once registered
1.6	HMRC VAT Registration number (VRN)	9 digits  e.g. 123456789	Found on business VAT certificate

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

1.11	Postcode of business local business's office receiving support	Free text (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 (100 words max)	The product/service it delivers. The customers it serves.
1.14	Growth/Scale-up potential	Free text (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  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 (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 (no character limit)	Brief description of the support given during an interaction.  Examples: Diagnostic, Referrals, Answer question, Ongoing support, Follow up.  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 (no character limit)	Included all referrals of any kind made by the hub.
1.21	<u>Purpose</u> of referral	Free text (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 (no character limit)	