



HAMPSHIRE COUNTY COUNCIL

REQUEST FOR QUOTATION SUPPLIER GUIDANCE NOTES

FOR THE PROVISION OF

DATA PROVISION AND TELEMARKETING IN SOUTH CENTRAL CLUSTER

Start date: 22/01/2020

End Date: 31/03/2020

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PART 1: INSTRUCTIONS FOR TENDERERS

Quotations must be submitted in accordance with the following instructions. Quotations not complying with these instructions may be rejected by Hampshire County Council ("the Authority") whose decision in the matter shall be final.

1. All aspects of this quotation exercise and all other information provided by or on behalf of the Authority must be treated as private and confidential.
2. Each tenderer responding to this quotation exercise undertakes to indemnify the Authority and to keep the Authority indemnified against all actions, claims, demands, liability, proceedings, damages, costs, charges and expenses whatsoever arising out of or in connection with any breach of the foregoing provisions.
3. Quotations must not be qualified but must be submitted STRICTLY in accordance with the ITQ document. Only Quotations submitted without qualification strictly in accordance with the ITQ documents will be accepted for consideration.
4. Quotations should remain valid for 90 days following closing date for submission.
5. The full cost of responding to this Quotation, including but not limited to any costs and/or expenses involved in the preparation of this Quotation, will be borne by the responder. The Authority shall have no liabilities in this regard.
6. The Authority takes no responsibility for identifying any ambiguities, inconsistencies or discrepancies, whether between the ITQ documents or in any quotations submitted. The responding tenderer must therefore ensure that the content of any response is complete and accurate.
7. The Authority does not bind itself to accept the lowest or any Quotation and reserves the right to accept the whole or any part of any Quotation, unless the Invitation to Quote stipulates otherwise.
8. Tenderers considering responding may raise clarification queries via email to procurement@enterprisem3.org.uk **no later than 2pm on 09/01/2020**
9. Quotations should be submitted via email to procurement@enterprisem3.org.uk **no later than 9am on 16/01/2020**
10. The prices quoted must be net prices and must be exclusive of Value Added Tax.

11. If any tenderer responding to the quotation exercise is found to have offered or given any gratuity, bonus, discount or bribe of any sort to any Authority officer or employee, the Authority shall be entitled to cancel his/her contract and to hold him/her liable for any loss and damage which the Authority may thereby sustain.
12. Any contract concluded as a result of this quotation exercise shall be governed by English Law and subject to the jurisdiction of the English courts.
13. Tenderers responding to the questionnaire should do so on the basis that the Authority has no prior knowledge of their organisation.

PART 2: INTRODUCTION, BACKGROUND AND SPECIFICATION

1. Purpose of this Invitation to Quote (ITQ)

This ITQ has been prepared by Hampshire County Council (the “Authority”) on behalf of the Enterprise M3 LEP acting as South Central Cluster Lead (SCC) for the purposes of inviting proposals from Suppliers for the provision of services described in the Specification attached as Part 3. This ITQ:

- Sets out the overall timetable and process for the procurement.
- Provides tenderers with information to enable them to submit a compliant Quotation (including providing templates where relevant).
- Sets out the Evaluation Model that will be used to evaluate Quotations.
- Explains the administrative arrangements for the submission and receipt of Quotations.

2. Contract Value and Funding

- The maximum budget for the service is **£45,000 excluding VAT**

3. Contract Term

- The contract will be for a period from 22nd January 2020 to 31st March 2020

4. Introduction and Background

- 4.1 Enterprise M3 LEP as part of the South Central Cluster (SCC) lead seeks a telemarketing company to gather Business Intelligence as a directive from the department of Business, Energy and Industrial Strategy.
- 4.2 The Department for Business, Energy and Industrial Strategy (BEIS) to prepare for Brexit formed clusters through England. The South Central Cluster is the combined area of Enterprise M3 LEP, Coast to Capital LEP, Solent LEP and Thames Valley Berkshire LEP. Enterprise M3 LEP are the lead member for the Cluster
- 4.3 The programme for the cluster will include seeking intelligence from businesses across the SCC to understand how ready they are for new trading arrangements when the UK leaves the EU and what additional support or information they may require to increase their resilience and productivity. This will then inform our response for what support provision is required.
- 4.4 Using a broad dataset of 16,000 records (to be provided by the Telemarketing company) to contact businesses across the geography of the cluster to ask questions as provided in a questionnaire by the cluster (see Annex B).
- 4.5 This information provided by the survey will be used for feeding back intelligence to the department of Business, Energy and Industrial Strategy and to tailor the current information and support offering by the South Central Cluster to businesses in their areas.

5. Requirement for data

- 5.1 We require the Telemarketing company to provide at least 16,000 GDPR compliant records of businesses in total within the cluster area.
- 5.2 Each record is to include company name, key decision maker contact name and job title; address including postcode; business sector and employee banding; email address and telephone number.
- 5.3 Organisation in the following sectors are to be excluded from the dataset:
 - a) Public sector
 - b) Third sector organisations.
- 5.4 The businesses should be sampled to reflect the sectoral and size make up of each LEP area to ensure the validity and reliability of survey results. It is important to ensure that the sampling is broadly representative of the business population (by size and sector) for each LEP area– a summary of the business profile is attached for each LEP area and can form the basis of a sampling framework, See Annex A
- 5.5 We require at least 4000 records per LEP area (minimum total overall 4,000 records) to ensure a spread of survey results across all four LEP areas in SCC. We have attached the postcodes for each individual LEP.
- 5.6 The data sampling of each LEP area will be produced in an Excel format to be checked by the relevant LEP before telemarketing commences.

6. Requirement for Telemarketing

- 6.1 The SCC will provide a survey comprising of EU Readiness questions and business support preferences. The questions will be a mixture of 3 free text and 7 multiple choice answers and are attached to the specification, see Annex B
- 6.2 Using the data sets agreed above in part 5, SCC requires 1,000 fully completed surveys per LEP area.
- 6.3 We will require weekly reports, to be completed every Monday by 12.00 noon, covering:
 - Number of completed surveys for each LEP area within SCC
 - Number of partially completed surveys for each LEP area within SCC
 - Number of survey refusals for each LEP area within SCC
 - Total weekly hours, dials and number of decision maker hits
 - Responses to survey to include:
 - Graphs demonstrating responses, which can be demonstrated in such a form
 - Free text answers
 - Ability to see individual responses to the survey
 - Short, accessible narrative provided with an overall summary of that week's responses
- 6.4 All information and data for this project must be held within the UK, including the responses to surveys and reports. For the avoidance of doubt, the survey is for genuine research purposes and will not be used for any marketing.

- 6.5 Enterprise M3 as lead of SCC will hold the reports for all LEPs in the SCC from the telemarketing company. All LEPs within SCC will sign Hampshire County Council's Data Sharing Agreement and Enterprise M3 will then share the reports specific for each LEP weekly.
- 6.6 Once 1000 surveys have been completed for a LEP, no more calls will need to be made for that area, even if there are outstanding data sets to be called.
- 6.7 We require the completion of a Final Report once 1000 surveys per LEP area have been completed. The report should include a word document outlining the summary of the results and also a report in excel format which is to include the following:
- Number of completed surveys for each LEP area within SCC
 - Number of partially completed surveys for each LEP area within SCC
 - Number of survey refusals for each LEP area within SCC
 - Total weekly hours, dials and number of decision maker hits
 - Responses to survey to include:
 - Breakdown of responses by LEP area
 - Graphs demonstrating responses, which can be demonstrated in such a form
 - Free text answers
 - Ability to see individual responses to the survey
 - Short, accessible narrative provided with an overall summary of that week's responses
- 6.8 Once the contract is awarded, we will require calls to commence as quickly as possible.

7. Programme timetable, selection and submission details

- 7.1 Proposals should be submitted via email no later than 9am on Thursday 16th January 2019.
- 7.2 Below is the timetable for the Project along with specific dates for selection and submission. (please note, the dates are subject to change without prior notification)

Element	Date
Invitations to quote sent	2 January 2020
Closing date for clarifications	9 January 2020
Closing date for submissions	9am 16 January 2020
Notification of outcome	21 January 2020
Contract commencement date	22 January 2020
Inception Meeting	10am 22 January 2020 (in person)

8. Working Arrangements and Implementation

- 8.1 An inception meeting in person or via telephone will be held with the successful tenderer to provide all necessary background information and agree the work plan, timeline and payment schedule. It will also provide an opportunity to discuss ideas and agree the support requirements for effective delivery.
- 8.2 All meetings with the Enterprise M3 LEP will be within the Enterprise M3 area <https://www.enterprisem3.org.uk/document/enterprise-m3-area-map>.
- 8.3 The day-to-day point of contact for the contract will be Sue Littlemore, Future Initiatives Manager at Enterprise M3 LEP.

PART 3: PRICING AND TENDER EVALUATION

1. Submitted Quotations will be assessed in accordance with the principles of transparency, equality of treatment and non-discrimination.
2. Tenderers MUST meet the following Stage 1 criteria to be eligible to be considered for the Price and Quality Stage 2 assessment criteria detailed below.
3. The following table provides the summary scoring mechanism which will be applied to Stage 1 of the evaluation process. All questions which have a PASS/FAIL score will be evaluated first. If a fail score is obtained on any of these questions, this will result in your Quotation being rejected and you will not progress any further in this procurement process.

Stage 1	Score/Weighting
Professional & Business Standing	Pass/Fail
Insurance	Pass/Fail

Stage 1 Pass/Fail Criteria

Please refer to the information below and complete the [Quotation Response Sheet](#).

Professional & Business Standing

Should any of the circumstances stated in the Questionnaire apply, the tenderer must declare these and provide details as requested in the Quotation Response Sheet.

The following table details the pass and fail criteria which apply to this section:

Appendix 4 – Section	Criteria for a ‘Pass’	Criteria for a ‘Fail’
Mandatory Exclusion Criteria	The tenderer has confirmed that none of the circumstances apply.	The tenderer has confirmed that one or more of the circumstances apply.
Discretionary Exclusion Criteria	The tenderer has confirmed that none of the circumstances apply, or has provided sufficient information to confirm mitigating factors have been put in place.	The tenderer has confirmed that one or more of the circumstances apply, and is unable to provide detail on how they have overcome the situation.

Economic and Financial Standing – Insurances

The Authority has risk assessed the insurance requirements for this procurement and has stated the levels required in the Quotation Response Sheet. If you already hold the required levels of insurance please be aware that the Authority may require copies of your insurance documents as evidence of this. Please ensure they are available if requested.

Where you do not currently hold the required levels of insurance, it is important that you check with your insurance company that you are able to obtain the levels of insurance required and that you are aware of any additional cost.

In the Quotation Response Sheet (Insurance), an answer of “NO” in columns 2 and 5 will result in a FAIL. An answer of “NO” in column 2 but a “YES” in column 5 will result in a PASS subject to the provision of the required written evidence from your insurance company which must be submitted with your completed tender. If you are unable to provide this evidence, this will result in a FAIL.

The Authority will require that the appropriate levels of insurance, as stated in the Quotation Response Sheet, are held by the successful supplier/s at contract award stage. The Authority will not award a contract to a tenderer that does not hold the required levels of insurance.

STAGE 2 - QUALITY AND PRICE EVALUATION

The Tender will be evaluated on the basis of **70%** quality and **30%** price.

The scores from Quality and Price sections will be added together to obtain a score out of 100. The Contract will be awarded to the Tenderer with the highest total score.

The tenders will be scored according to the evaluation criteria as detailed in the sections below.

Stage 2 - Response to Specification 70%

TENDER SCORE CRITERIA.

To provide transparency in how tenders will be evaluated, the weightings and scoring methodology have been provided below. A tender panel will manage and oversee the scoring process and insertion of final scores into the scoring matrix. Scoring will be as follows with one score being allocated for each area Criterion:

Criterion 1	Proposed Approach Weighting 40%
<p>Suppliers must describe their proposed approach to implementation, setting out relevant methodologies, presentation of the results and the following:</p> <ul style="list-style-type: none">• An outline project plan and timetable to implement the proposed solution, including how long it will take to set up the campaign and commence calls.• A detailed description of how you will work with Enterprise M3 to deliver the services, specifying the resources and activities required in terms of EM3's staff.•	

Evaluation Marking Scheme	
100%	The tenderer's answer is comprehensive and demonstrates a reasonable time frame for implementation. All elements of the question have been clearly answered with a high level of detail.
75%	The tenderer has demonstrated a good understanding of the issues. A reasonable time frame for implementation was provided and all elements of the question were addressed. The evidence provided is clear and convincing with minor reservation(s) in one (1) key area
50%	The tenderer has demonstrated a reasonable understanding of the issues. The evidence is fairly clear and convincing with minor reservations in two (2) or more key areas.
25%	In the majority of the areas, the evidence is unclear and unconvincing. The overall response casts doubt on the tenderer's ability to deliver the service required.
0%	In virtually all key areas there is a lack of convincing evidence which casts serious doubt about the tenderer's ability, skills and knowledge.
Criterion 2	Data Sampling Weighting 20%
<p>Suppliers must describe their proposed approach for sampling the 16000 data records needed for the completion of 1000 surveys for each LEP area.</p> <ul style="list-style-type: none"> • Outline of methodology for collecting data records • How sampling will be carried out to ensure a varied spread of sectors and sizes of businesses from within each LEP 	
Evaluation Marking Scheme	
100%	The tenderer's answer is comprehensive and demonstrates a reasonable methodology for collecting data records. All elements of the question have been clearly answered with a high level of detail.
75%	The tenderer has demonstrated a good understanding of the issues. A reasonable methodology has been provided and all elements of the question were addressed. The evidence provided is clear and convincing with minor reservation(s) in one (1) key area
50%	The tenderer has demonstrated a reasonable understanding of the issues. The evidence is fairly clear and convincing with minor reservations in two (2) or more key areas.
25%	In the majority of the areas, the evidence is unclear and unconvincing. The overall response casts doubt on the tenderer's ability to deliver the service required.
0%	In virtually all key areas there is a lack of convincing evidence which casts serious doubt about the tenderer's ability, skills and knowledge.
Criterion 3	Resource Planning Weighting 40%

Please provide details of your Team, setting out roles of key/ managerial personnel, together with a brief summary of the following which demonstrates their suitability for these roles to ensure successful delivery of the Contract:

- Relevant capacity – including contingency plans when key personnel are not available and detailing how many staff will be involved in the project
- Skills
- Experience
- Qualifications
- Outline duties and responsibilities of key/managerial personnel

Evaluation Marking Scheme

100%	The tenderer's answer is comprehensive and clearly demonstrates that they have the resources available to undertake the contract. All elements of the question have been answered with a high level of detail.
75%	The tenderer has demonstrated a good understanding of the issues. The evidence provided is clear and convincing with minor reservation(s) in one (1) key area. Overall it appears that the tenderer has reasonable resources to deliver the contract.
50%	The tenderer has demonstrated a reasonable understanding of the issues. The evidence is fairly clear and convincing with minor reservations in two (2) or more key areas.
25%	In the majority of the areas, the evidence is unclear and unconvincing. The overall response casts doubt on the tenderer's ability to deliver the service required.
0%	In virtually all key areas there is a lack of convincing evidence which casts serious doubt about the tenderer's ability, skills and knowledge.

STAGE 2 – Price Evaluation 30%

The tenderers' rates should be provided in the Pricing Schedule table found within the Quotation response sheet, and in the format requested.

No costs associated with the sales or setup process or those related to maintaining the responding tenderer's own infrastructure will be borne by the Authority. The Authority will accept no charges for the time the responding tenderer spends building its knowledge; sharing insights, and, developing its people.

All prices quoted should include travelling and subsistence costs where applicable. Please note that one day means 7 working hours i.e. excluding travel and breaks.

Prices must contain all and any other costs associated with the Goods/Services, including delivery. All other costs are to be included within the prices submitted.

The Schedule of Rates/Pricing Schedule must be priced in Pounds Sterling and should be **exclusive of VAT**.

No additional variation in the rates will be accepted for any reason whatsoever unless agreed in writing by the Authority.

Any rate decreases available must be offered with immediate effect.

Pricing is weighted at 30% and will be assessed using the following methodology:

The lowest Price (total of the Price Schedule) will be awarded 30 points with the other tenderers receiving proportionally lower scores, calculated as:

Lowest Price (for provision of services) divided by tendered price x 30

For example tenderer C's price is lowest at £42,000 tenderer C will get 30 points.

If tenderer A's price is £45,000 their score will be calculated as per the below:

$$\frac{\text{Lowest Priced Quote}}{\text{Tenderer's Quote}} \times \text{Weighting Percentage} = \text{Score}$$

i.e. £42,000 / £45,000 x 30% = 28

Annex A Sampling Framework South

Central Cluster Business Profile

Source: Nomis

area name

date

legal status

Coast to

Capital

2019

Total

Industry	Total	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
1 : Agriculture, forestry & fishing (A)	1,990	1,890	85	10	5
2 : Mining, quarrying & utilities (B,D and E)	375	315	45	10	5
3 : Manufacturing (C)	3,845	3,230	480	110	25
4 : Construction (F)	12,850	12,325	460	50	10
5 : Motor trades (Part G)	2,190	1,995	170	15	10
6 : Wholesale (Part G)	3,230	2,710	435	75	15
7 : Retail (Part G)	7,840	7,265	510	55	10
8 : Transport & storage (inc postal) (H)	2,135	1,895	185	40	10
9 : Accommodation & food services (I)	4,550	3,470	990	75	10
10 : Information & communication (J)	10,180	9,785	335	50	10
11 : Financial & insurance (K)	1,850	1,705	105	25	15
12 : Property (L)	3,130	2,930	180	10	5
13 : Professional, scientific & technical (M)	18,370	17,610	645	100	15
14 : Business administration & support services (N)	8,395	7,635	595	135	30
15 : Public administration & defence (O)	155	125	15	0	15
16 : Education (P)	1,735	1,305	250	125	55
17 : Health (Q)	3,520	2,420	880	185	35
18 : Arts, entertainment, recreation & other services (R,S,T and U)	6,325	5,715	525	70	15
Column Total	92,680	84,340	6,895	1,150	295

Annex A Sampling Framework
South Central Cluster Business Profile
Source: Nomis

area name Enterprise M3
date 2019
legal status Total

Industry	Total	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
1 : Agriculture, forestry & fishing (A)	2,145	2,010	120	15	5
2 : Mining, quarrying & utilities (B,D and E)	330	285	35	10	0
3 : Manufacturing (C)	3,330	2,735	455	105	30
4 : Construction (F)	9,620	9,120	445	40	15
5 : Motor trades (Part G)	2,080	1,890	165	20	5
6 : Wholesale (Part G)	2,800	2,270	420	90	20
7 : Retail (Part G)	4,320	3,900	370	40	10
8 : Transport & storage (inc postal) (H)	2,270	2,075	155	35	5
9 : Accommodation & food services (I)	2,975	2,130	725	90	35
10 : Information & communication (J)	10,420	9,850	460	80	25
11 : Financial & insurance (K)	2,100	1,985	85	20	10
12 : Property (L)	2,925	2,765	150	10	5
13 : Professional, scientific & technical (M)	18,640	17,780	720	110	35
14 : Business administration & support services (N)	7,210	6,500	560	120	30
15 : Public administration & defence (O)	210	180	10	5	15
16 : Education (P)	1,415	1,035	225	120	35
17 : Health (Q)	2,550	1,845	525	155	25
18 : Arts, entertainment, recreation & other services (R,S,T and U)	5,120	4,535	495	70	15
Column Total	80,465	72,890	6,115	1,135	325

Annex A Sampling Framework
South Central Cluster Business Profile
Source: Nomis

area name Solent
date 2019
legal status Total

Industry	Total	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
1 : Agriculture, forestry & fishing (A)	695	660	30	0	0
2 : Mining, quarrying & utilities (B,D and E)	175	140	25	5	5
3 : Manufacturing (C)	2,615	2,135	370	85	20
4 : Construction (F)	7,170	6,850	280	30	5
5 : Motor trades (Part G)	1,330	1,185	125	15	5
6 : Wholesale (Part G)	1,305	1,050	210	35	10
7 : Retail (Part G)	6,325	5,555	730	30	5
8 : Transport & storage (inc postal) (H)	1,675	1,520	115	30	10
9 : Accommodation & food services (I)	2,750	2,115	590	40	5
10 : Information & communication (J)	3,165	2,990	140	35	5
11 : Financial & insurance (K)	735	680	35	10	10
12 : Property (L)	1,340	1,285	50	5	0
13 : Professional, scientific & technical (M)	6,590	6,195	340	45	10
14 : Business administration & support services (N)	3,410	3,025	290	80	15
15 : Public administration & defence (O)	75	55	10	5	5
16 : Education (P)	785	545	140	75	20
17 : Health (Q)	1,705	1,110	475	105	15
18 : Arts, entertainment, recreation & other services (R,S,T and U)	2,640	2,305	300	35	0
Column Total	44,480	39,410	4,255	670	145

Annex A Sampling Framework
South Central Cluster Business Profile
Source: Nomis

area name	Thames Valley Berkshire				
date	2019				
legal status	Total				
Industry	Total	Micro (0 to 9)	Small (10 to 49)	Medium-sized (50 to 249)	Large (250+)
1 : Agriculture, forestry & fishing (A)	570	535	30	0	0
2 : Mining, quarrying & utilities (B,D and E)	195	165	20	5	5
3 : Manufacturing (C)	1,635	1,335	220	55	25
4 : Construction (F)	4,845	4,620	200	25	0
5 : Motor trades (Part G)	1,120	1,020	85	10	5
6 : Wholesale (Part G)	1,785	1,395	295	70	20
7 : Retail (Part G)	2,350	2,115	200	20	10
8 : Transport & storage (inc postal) (H)	1,835	1,645	145	35	10
9 : Accommodation & food services (I)	1,560	1,160	335	45	15
10 : Information & communication (J)	8,250	7,725	365	130	35
11 : Financial & insurance (K)	860	810	25	15	5
12 : Property (L)	1,285	1,180	90	10	5
13 : Professional, scientific & technical (M)	9,930	9,450	375	75	30
14 : Business administration & support services (N)	4,270	3,830	315	95	30
15 : Public administration & defence (O)	85	75	10	0	5
16 : Education (P)	760	540	105	85	30
17 : Health (Q)	1,450	1,015	350	70	15
18 : Arts, entertainment, recreation & other services	2,620	2,280	285	40	15
Column Total	45,405	40,895	3,455	795	260

ANNEX B – SURVEY QUESTIONS

1. Do you export?
2. If not, are you looking to export?
3. Percentage of workforce who are EU nationals
4. What areas of support and intervention would you find most valuable to increase your competitiveness in your market? Please select your top three.
 - One to one tailored expert business growth advice
 - One-to-One clinics with Experts (including Accountants, Law firms Logistics companies)
 - Advice on exporting
 - Leadership and Management training
 - Peer-to-Peer networking
 - Help with Staff and Recruitment
5. What are the key issues your company needs to address over the coming months? Please select your top three.
 - Recruitment/ retention of staff
 - Cashflow
 - Change in UK customer demand
 - Change in global customer demand
 - Viability of your supply chain
 - Impact on exports/imports
 - Raising investment
 - Access to New Markets
 - Business/Strategy planning
 - Sales and Marketing
6. What positive and/or negative signs of change or economic instability have you noticed in your sector/market?
7. What opportunities and investment deals has your company made recently/ will make over the coming period?
8. Have you mapped your supplier and customer base- and considered how changes in the UK-EU trade relationship could affect them?
9. Have you reviewed your international trade and customs processes to prepare for Brexit?
Are you familiar with the latest guidance from HMRC?
10. Have you/ your management team devoted time to considering the potential consequences of Brexit- direct or indirect- on your businesses?