INVITATION TO QUOTE

**Compliance Support and Due Diligence Services - Business Health Matters (BHM)**

You are invited to submit a quotation for the provision of performance management and due diligence services to the ESF funded Business Health Matters Project supported by Active Lancashire as Accountable Body.

## Applications are invited from suitably qualified and experienced organisations for the supply of services that meet the relevant standards (as detailed in Section A) and as detailed within the Pricing Schedule (Section C). It is essential to comply with the following instructions in the preparation and submission of your quotation. We reserve the right to reject a quotation that does not fully comply with these instructions.

Your quotation must be completed in English and a hard copy must be submitted **no later than 5PM Friday 15th October 2021.** All quotations mustbedelivered to the address below. **Please use the wording provided at the end of this document on the envelope.**  Please ensure the packaging bears no reference to your company (such marks include identification through postal franking logos or details revealed through express carriers/Recorded Delivery Details etc).

## If for any reason you are unable to submit a quotation, then the officer named below should be contacted either in writing or alternatively by e-mail:

## **Name:** Paul Blythin, Operations Manager (Health)

**Address:** Active Lancashire, Offices 3 and 4, Farington House, Centurion Way, Lancashire Business Park, Leyland, Lancashire, PR26 6TW

## **Email:** pblythin@activelancashire.org.uk **Tel: 07549 774563**

### Your quotation must be completed in full and where necessary signed and dated. Failure to return a completed quotation will invalidate your submission.

## Any quotation submitted will be deemed to remain open for acceptance or non-acceptance for not less than 90 days from the closing date stipulated above. Active Lancashire may accept the quotation at any time within this prescribed period. Active Lancashire shall, however, not be bound to accept the lowest or any quotation.

### The standard terms and conditions of Active Lancashire together with Special Conditions (if any) will apply to all orders placed as a consequence of this process. Any Special Conditions will be set out in the Specification.

### **Should you need any clarification regarding this process or any of the information contained in this document, please contact the officer named above.**

## **BACKGROUND INFORMATION**

Active Lancashire and its partners have been successful in submitting a Priority 2.1 bid to the Lancashire ESF fund. Business Health Matters, is supported by 18 delivery partners and a number of regional and national organisations, the Active Lancashire led programme has brought together the expertise of specialists at the University of Central Lancashire, ukactive and Lancashire Mind to deliver a tailored and affordable workplace health offer to Lancashire-based SMEs. As a result of this 3-year programme, employees across the county will be empowered to take ownership and improve their own health and wellbeing, whilst businesses will benefit from a healthier, happier and more resilient workforce.

In response to the increased levels of poor health within Lancashire’s workforce, the programme offers two main services to businesses in the form of the ESF-funded Workplace Health Champion Training and the government-backed Workplace Health Screenings service. The free training includes basic skills (Mathematics, English and ESOL) and a Level 2 and Level 3 NCFE-accredited qualification for those individuals who wish to drive change in their organisations and create a network of health ambassadors across the county. The screenings, focused on employees aged 50+, combine a physical health assessment and mental health element to produce a unique tool for employees to learn more about their own health and take positive steps to improve it.

We now require support from a specialist organisation who can help us to comply with the terms of the ESF funding and can support our partnership in ensuring that the performance of the programme matches the terms of the Grant Funding Agreement.

## **Specific roles and responsibilities include:**

* To provide ongoing advice to the partnership regarding compliance and performance issues during the lifetime of the project; in particular:
  + To be responsible for establishing, driving and monitoring the Sustainability and Diversity Implementation Plans on behalf of the Business Health Matters partnership;
  + To be responsible for the monitoring of compliance in relation to state aid and to advise partners and businesses of action needed to address any compliance issues;
* To help support the Business Engagement Officer to identify relevant SME’s and their networks that would benefit from receiving the support offered from the Project.
* To provide a light touch audit function on a quarterly basis reviewing participant data submitted as part of the DWP claims process
* To support the partnership in preparing for audits by DWP and the EU and any follow up actions, also including attendance at audits visits.

**Key performance indicators and output evidence requirements**

* Quarterly reports to the Project Steering Group on progress in delivering the Sustainability and Diversity Implementation Plans;
* Attendance at regular progress meetings with the Active Lancashire Contract Manager over the same period.
* Attendance on an ad hoc basis to partnership events and meetings to advise on compliance, performance and eligibility matters.

**Additional Requirements that apply:**

The application process for Business Health Matters is very prescriptive and it is vital that the project adheres closely to the specification set down by the DWP in their Grant Funding Agreement. The successful contractor will need to be strong project management skills, have proven experience in the management of EU funded projects, and up to date knowledge of ESF funding process**.**

The contractor will be expected to have a detailed understanding of the eligibility criteria and compliance procedures relating to the European Social Fund in particular.

Active Lancashire and its BHM partners comprise a wide group of organisations and third sector groups across Lancashire who have come together over the past 3 years to work in partnership to improve the productivity and sustainability of SME’s by supporting and improving the health of their employees The successful tendered will be expected to work with this partnership over the 2 year funding period 2021-23 to support all partners to comply with the terms of the Funding Agreement.

**Management of Contract**

Active Lancashire is the Accountable Body for the contract. Active Lancashire will appoint a Contract Manager to oversee this appointment who will be responsible for the day-to-day management of the contract and who will manage the progress of the assignment during its lifetime. The Contract Manager for this assignment, including any questions on the specification, is Paul Blythin. The contractor will be required to report to Paul Blythin at Active Lancashire at regular intervals, providing written progress reports at agreed times and intervals on achievements towards key performance indicators and a detailed overview of contract delivery and requirements.

## The Contractor will be required to provide **quarterly consolidated invoices** quoting the official reference number raised electronically for the services, accompanied by agreed evidence requirements, including timesheets.

The contract period will be 1st January 2022 to 31st December 2023 and will be subject to a satisfactory annual review by the Contract Manager.

Should the performance against key indicators fall substantially below a level acceptable to Active Lancashire or should the contract activity be deemed non-compliant with the grant offer letter terms and conditions, Active Lancashire reserves the right to require the Contractor to provide a detailed action plan to ensure compliance with the service requirements. Failure to comply with this provision will entitle Active Lancashire to terminate the contract.

**Contract review period**

Active Lancashire reserves the right to negotiate variances to any agreed service schedule to ensure we meet the needs of the organisation to deliver the project contract. An annual review at the end of year 1 led by the Active Lancashire Director of Operations will determine major variances to the contract schedule and specification of services to be provided.

**Expected Value of Contract**

We are looking to secure a contractor that provides value for money and can demonstrate that they have a strong fit with the ESF Cross Cutting themes of Equality and Sustainability. The expected costs of this contract is in the range of £10,000 - £20,000 year inc. VAT.

**Section A – Quality Questions**

**Each question carries a total weighting of up to 8% (48% in total for this Section)**

|  |  |
| --- | --- |
|  | **Please give a minimum of two examples where you have provided services of a similar nature to this contract including examples of the clients for which you have worked and describe your specific roles in each case.** |
|  |  |
|  | **Please explain your knowledge of the evidence requirements of the European Social Fund in relation to cross cutting themes and an example of where you have provided this support function previously.** |
|  |  |
|  | **Please evidence how you would secure examples of environmental considerations in project delivery from the types of organisations involved in delivering this project. (SME’s/Councils/Leisure Trusts/3rd sector organisations)** |
|  |  |
|  | **Please provide details of any experience you have in supporting SME’s to access european funded support – giving at least one example.** |
|  |  |
|  | **Please outline your understanding and any experiences you have in relation to delivering the health and well being agenda in Lancashire** |
|  |  |
|  | **Please specify the level and nature of the support services that you would provide to the partnership. Describe the individual activities included in your proposed support services. (500 words maximum).** |
|  |  |

**Section B – Deliverability**

**Each question carries a total weighting of up to 11% (22% in total for this Section)**

|  |  |
| --- | --- |
| **1.** | **Please provide evidence of your availability to deliver this contract including the names and roles of key staff responsible for its oversight and delivery outlining their expertise.** |
|  |  |
| **2.** | **Please provide details of your experience of working to specific deadlines and specifications required by funding applications including examples of funding regimes for which you have been required to provide monitoring reports and the timescales involved.** |
|  |  |

**Section C – Evaluation**

## **Quotations will be evaluated as follows:**

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| --- | --- |
| **Criteria** | **Scoring %** |
| Price | 30% |
| Deliverability | 22% |
| Quality | 48% |

Section D - Schedule of Prices

The lowest tender will receive the full allocation of 30%. The remaining tenders will receive a percentage score based on their relationship to the lowest tender using the following calculation:

Your score = Lowest submitted price x 30

Your submitted price

I/We the undersigned hereby offer to provide the goods and/or services described or referred to in the invitation to quote documentation for the following costs, inclusive of value added tax: (all costs to be quoted in pounds sterling and inclusive of V.A.T.)

|  |  |
| --- | --- |
| **Service Requirement** | **Direct costs** |
| **A. Core Contract Activities over the 2 year period (1.1.2022 to 31.12.2023)** |  |
| **B. Travel costs** |  |
| **C. Other expenses (specify)** |  |
| **D. Total (A+B+C)** |  |
| **Total (including VAT)** |  |

**Settlement Terms:** …………………….. (please specify)

1. Period for which price will remain fixed (from closing date for quotes) …………………………..
2. State any other charges: ………………………………………………………………………………

I/We hereby offer to supply the above mentioned services on Active Lancashire Standard Conditions of Contract and Special Conditions (if any) and confirm that we have read, understood and agree to be bound by Active Lancashire’s Standard Terms and Conditions and Special Conditions for all orders placed as a result of this process.

|  |  |
| --- | --- |
| **Signed** |  |
| **Date** |  |
| **Name (Block Capitals)** |  |
| **Job Title** |  |
| **For and on behalf of** |  |

# Wording on the tender envelope:

**The wording below MUST be on the front of the package/envelope** and must bear no reference to your company (such marks include identification through postal franking logos or details revealed through express carriers/Recorded Delivery Details etc.)

**PRIVATE & CONFIDENTIAL**

**Tender for Compliance Support & Due Diligence Services (BHM)**

**TO BE RETURNED NO LATER THAN 15th October at 17.00 hours**

#### **Paul Blythin**

#### Active Lancashire

#### Offices 3 and 4, Farington House,

#### Centurion Way,

#### Lancashire Business Park,

#### Leyland,

#### Lancashire, PR26 6TW