



## **ERDF Project Evaluation and Summative Assessment Request for Quote**

**Issue date: Tues 17th January 2023**

**Return date: Noon, Fri 10<sup>th</sup> February 2023**

**Issued by:  
Laura Hutchings  
Programme Coordinator  
SWLEP**



## 1. Requirement

Invitation to quote for the development and delivery of a summative assessment for the Swindon and Wiltshire Local Enterprise Partnership SME Competitiveness Programme, that complies with the requirements of the European Regional Development Fund. Details of these requirements can be found here and must be read in conjunction with this document:

<https://www.gov.uk/government/publications/evaluation-of-the-european-regional-development-fund-2014-to-2020>

## 2. Background

Funded by the European Regional Development Fund, the SME Competitiveness Programme is aimed to provide information, advice, brokerage and signposting to those SMEs looking to obtain the best solutions for business growth or start up. The programme runs from 1<sup>st</sup> January 2020 until 31<sup>st</sup> June 2023. The Consortium delivering the program includes:

- Swindon and Wiltshire Local Enterprise Partnership (Programme lead)
- Wiltshire Council (Accountable Body)
- Swindon Borough Council
- YTKO (Start up support)
- Setsquared (Innovation and scale up support)

The programme provides a range of diagnostic, brokerage and support services to SMEs across Swindon and Wiltshire, through the delivery of general and specialist workshops, one-to-one impartial advice, mentoring and resources. Support can also include;

- Starting out and business planning
- Employing new staff
- Developing new products
- Business growth guidance
- Tailored business support lead by a team of Business Navigators
- Brokerage to other support
- Innovation and scale up guidance
- Workforce skills opportunities

The SME Competitiveness Programme also delivers integrated co-working with the local Growth Hub and delivery partners to develop and enhance business support services both for start-up and existing companies.

In addition, the programme incorporated a Child Project, which delivered ERDF COVID Recovery Grants Between September 2020 and May 2021 which will also need to be reviewed as part of the summative assessment, however, this can be light touch and included in the main report.

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### The Summative Assessment

The ERDF grant funding agreement places a requirement on all grant recipients to undertake a summative assessment. Whilst there are aspects which must be implemented in strict accordance with the issued guidance, every ERDF project is different and the evaluation methods need to be tailored to the type of project activity and the outcomes and impacts it is seeking to achieve.

Summative assessments are intended to provide insights into project performance to enhance project implementation, reliable evidence of their efficiency, effectiveness and value for money, as well as insights into what and why interventions work (or not), and lessons for the future. It will also provide project level evidence which, combined with national evidence of progress and impact, will result in stronger evidence of the overall impact and effectiveness of the ERDF operational programme across England.

### Scope of the Summative Assessment

While the approach to collecting information and the type of analysis within each summative assessment may vary, all assessments need to cover the following themes: relevance and consistency, progress, delivery and management, impacts, assessing value for money.

- Stage 1 - summative assessment planning: what must be done in order to plan for the successful implementation of the summative assessment. This includes the preparation of the logic model and the summative assessment plan using the templates provided by the managing authority.
- Stage 2 - data collection and reporting: how you need to record and report upon data to ensure that ERDF programme’s monitoring requirements are met.
- Stage 3 - reporting and communication: the completion of the summative assessment and its summary, submission of the report to the managing authority and the communication of its messages.

### 3. RFQ Response: Mandatory Requirements

This is a pass/fail section. Failure to confirm your ability to deliver the mandatory requirements will mean that your response will be deemed as non-compliant.

| Requirement   | Mandatory (M)<br>Desirable (D) |
|---|--------------------------------|
| <b>The following activities are sought in relation to ERDF Project Evaluation &amp; Summative Assessment</b>            |                                |
| Tasks required:   | Mandatory (M)<br>Desirable (D) |
| I. Summative assessment planning: what must be done in order to plan for the successful implementation of the summative | <b>M</b>                       |

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|  <p style="font-size: 1.2em; margin: 0;"><b>Swindon &amp; Wiltshire</b></p> <p style="font-size: 0.8em; margin: 0;">LOCAL ENTERPRISE PARTNERSHIP</p> | <p style="margin: 0;"><b>Request for Quote</b></p> <p style="margin: 0;">ERDF Project Evaluation &amp; Summative Assessment Jan 23</p> |
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| assessment. This includes the preparation of the logic model and the summative assessment plan using the templates provided by the managing authority.                                |          |
| 2. Data collection and reporting: how you need to record and report upon data to ensure that ERDF programme’s monitoring requirements are met.  | <b>M</b> |
| 3. Reporting and communication: the completion of the summative assessment and its summary, submission of the report to the managing authority and the communication of its messages. | <b>M</b> |

**Details of ERDF requirements for summative assessments can be [found here](#)**

### **1. Methodology and Approach**

Submitted responses to this Request for Quote should include the proposed methodology for undertaking the summative assessment. Please refer to Section 3, Mandatory Requirements, to frame your submission.

Proposals should also include:

- Design a methodology to carry out the summative assessment that incorporates ERDF requirements, considers ERDF guidance, and builds on the summative assessment plan
- Review our delivery data and evidence of benefit and impact to meet the needs of the summative assessment
- Complete final summative assessment report and required summary findings report.

In your response, please include details setting out how this would be achieved within the required timescales.

### **2. Skills and experience and required**

A CV setting out the relevant skills and experience of undertaking comparable work for each named member of the team should be included in the response.

If you intend to use a third-party contractor/s to supply some services, please include a brief description and include their details in this section.

Please include examples of previous work which your organisation, or any subcontractor you intend to use, has completed which are relevant to this request for quote.

We expect the following knowledge, experience and skills:

- a. Experience of developing ERDF summative assessments, a strong background in economic analysis, policy making or comparable work;

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- b. Access to a wide range of evidence, drawing on both quantitative and qualitative data sources and knowledge to support the work;
- c. Proven ability to link multiple sources of information, data sets and policy documents with Government policy to give a well-rounded, actionable recommendations that consider the wider economic context in which the Swindon and Wiltshire economy operates;
- d. A good knowledge of business support programmes, particularly Growth Hubs; and
- e. presentation of data and analysis using GIS.

**Timeline**

|                            |   |
|----------------------------|---|
|                            |   |
| RFQ opens                  | <b>Tuesday 17<sup>th</sup> January 2023</b>   |
| RFQ deadline for questions | <b>Friday 27<sup>th</sup> January 2023</b>    |
| RFQ deadline for response  | <b>Friday 10<sup>th</sup> February 2023</b>   |
| Interview if required      | <b>Tuesday 14<sup>th</sup> February 2023</b>  |
| Evaluation and Feedback    | <b>Thursday 16<sup>th</sup> February 2023</b> |
| Notification of Award      | <b>Monday 20<sup>th</sup> February 2023</b>   |

**3. Selection criteria**

| Criteria | %  |
|----------|----|
| Quality  | 80 |
| Cost     | 20 |

Submissions will be scored against the following criteria within the written proposals:

1. Innovative and robust methodology (25%)
2. Understanding the requirement of the brief and clarity of response (15%)
3. Track record of producing summative assessment and comparable work (20%)
4. Skills and experience of the team allocated to the work (20%)
5. Value for money (20%)

Scoring will made on the following basis:

|  |
|--|
| <b>0 = No response</b> is provided, or the <b>response does not address the question;</b>  |
| <b>1 = Very Poor</b> – Response significantly fails to meet the standards required, contains significant shortcomings and/or is inconsistent or in conflict with other proposals which is unlikely to deliver the output/outcome to the required standard; |



2 = **Poor** - Response falls short of achieving expected standard in a number of identifiable respects and may not deliver the output/outcome to the required standard;

3 = **Adequate** - Response meets the required standards in certain material respects, and provides certain information which is relevant, but is lacking or inconsistent in others and is likely to deliver the output/outcome to a satisfactory standard;

4 = **Good** - Response meets the required standard in all most material respects; but is lacking or inconsistent in minor respects and is likely to deliver the output/outcome to a high standard

5 = **Excellent** - Response meets the required standards in all material respects and is extremely likely to deliver the required output/outcome to a high standard.

#### 4. Report format

The outline business case should be written in MS Word and include charts, tables, graphs and maps where appropriate. The final report should be written using the Gill Sans font 12 point and should include a bibliography listing any data sources used including the online link to the source material or data.

#### 5. References

Please supply the name and contact details of three referees who we can contact.

#### 6. Budget

The budget for the work is a maximum of £15,000 (includes VAT).

#### 7. Timescale

A Gantt chart setting out key activities to deliver this commission is required in responding to this invitation to request for quote setting out milestones which are over and above those identified by the SWLEP.

**Please note that SWLEP reserves the right to cancel the procurement process at any point and is not liable for any costs resulting from any cancellation.**

#### 8. Risk

Please include a risk register in your response.

#### 9. Insurance

In your response, please self-certify the level of insurance which you have in place for:

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- a) Employers Liability Insurance
- b) Public Liability Insurance
- c) Professional Indemnity Insurance

**10. Lead contact**

In your response, please clearly include the lead contact details for further correspondence as follows:

|                  |  |
|------------------|--|
| Details          |  |
| Signature        |  |
| Name             |  |
| Position         |  |
| Date             |  |
| Telephone number |  |
| E-mail address   |  |

**11. Questions and RFQ response submission**

Please submit any questions by email **before noon on 27 January** to [smecompetitiveness@swlep.co.uk](mailto:smecompetitiveness@swlep.co.uk).

Please submit your response to this RFQ by email to [smecompetitiveness@swlep.co.uk](mailto:smecompetitiveness@swlep.co.uk) **by noon on 10 February**.

Please do not include general marketing or promotional material from your organisation as answers to any of the sections unless specifically requested to do so.

**12. Clarification and Interviews**

SWLEP reserves the right to seek clarification on any part of the proposal or quote and reserves the right to shortlist one or more providers to for a presentation / interview before awarding a contract.



### **13. Contract award**

SWLEP reserves the right to award the contract as set out in the timeline, at a later date, or not at all.

SWLEP reserves the right to require a non-disclosure agreement as part of the contract award.

SWLEP uses its own contract terms

Prepared by:  
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Programme Coordinator  
Swindon and Wiltshire Local Enterprise Partnership  
16/01/2023

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