**INVITATION TO TENDER**

**Title:** **Independent Evaluation of the Workplace Health Champion Training**

**Closing date: Monday 31st January 2022**

**ESF-Workplace Health Champion Training Evaluation – Business Health Matters (BHM)**

You are invited to submit a quotation for the evaluation of 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 B) 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 it must be submitted electronically to **imakri@activelancashire.org.uk** no later than **5PM Monday 31st January 2022**. All submissions will be acknowledged and the bidder will be notified by email.

The email submitted must include **Confidential, ESF-Workplace Health Champion Training Evaluation Tender** in the subject line.

We will only accept responses submitted via email. We will not accept any responses submitted by any other method. Any tender delivered after the closing date and time for any reason will be discounted. Active Lancashire is not responsible if all or part of your tender is not received.

If for any reason you are unable to submit a quotation, then the officer named below should be contacted either by email or alternatively by phone:

 **Name:** Iliana Makri, Research & Insight Manager

 **Email:** imakri@activelancashire.org.uk

 **Phone:** 07869 754518

Your quotation must be completed in full. 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**

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 Workplace Health Champion Training project aims to support people aged 18+ who are in work, to develop skills to maintain or advance their employment. 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. Workplace Health Champions will work collaboratively with our delivery partners and each other to continue to inspire and motivate their colleagues to live happier, healthier lives. 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.

**Active Lancashire is seeking an external research team to measure the impact of the ESF-funded Workplace Health Champion training project.**

**Evaluation**

The evaluation will run from 14th February 2022 until 31st December 2023 and will seek to explore the impact the ESF-funded Workplace Health Champion training has on SMEs.

Specifically, the independent evaluation should:

* Explore the impact that basic skills training and the Workplace Health Champions training has on employees and employers?
* Explore any differences and similarities between online and face to face training in regards to Workplace Health Champions effectiveness in carrying out their role
* Identify the benefits SMEs gain from having Workplace Health Champions as part of their workforce and what value businesses attach to these benefits
* Identify any differences between employers taking part in various aspects of the ESF project; such as employers taking part in both ESF and Health screening projects, employers taking part only on the Health Screening or Champion Training and employers that do not participate in any of the above projects

**Requirements**

* Attendance at regular progress meetings with the Active Lancashire Research Manager monthly or bi-monthly
* Attendance on an ad hoc basis to partnership events and meetings to report on progress
* Produce a comprehensive report with the finding of the evaluation with interim report at the end of year 1

**REQUIREMENTS THAT APPLY:**

**Insurance**

The successful applicant will need to have in force with a reputable insurance company:

1. professional indemnity insurance at an amount not less than £5,000,000;
2. public liability insurance at an amount not less than £10,000,000

**ESIF Branding and Publicity Requirements**

The successful applicant will need to adhere to the ESIF Branding and Publicity Requirements Version 8, August 2019 (see Schedule 1).

**Information Governance Requirements**

The successful applicant will need to ensure that it complies with the requirements of all legislation and regulatory requirements in force from time to time in the UK relating to the use of personal data and the privacy of electronic communications, including (i) the Data Protection Act 2018 and any successor UK legislation, (ii) the retained EU law version of General Data Protection Regulation (*(EU) 2016/679*) (UK GDPR), and (iii) the Privacy and Electronic Communications Regulations 2003 (*SI 2003/2426*) and the guidance and codes of practice issued by the Information Commissioner and any related ESF guidance.

**Cyber Security**

The successful applicant will need to use the latest versions of anti-virus definitions available from an industry accepted anti-virus software vendor to check and delete Malicious Software from any IT Platforms used in relation to this work.

**Intellectual Property Rights (IPR’s)**

Not applicable

**Non-Disclosure Agreement**

Not applicable

**Management of contract**

Active Lancashire is the Accountable Body for the contract. The Contract Manager for this service, including any questions on the specification, is Iliana Makri, Research and Insight Manager. Please specify in your proposal the named individual who will be responsible for the account management of this contract on behalf of your organisation. Meeting that relate to the management and reporting of the contract will be agreed in liaison with the successful bidder.

**Timescales**

The following timescale shall apply to this contracting process:

|  |  |
| --- | --- |
| **Process** | **Date** |
| Issue of Tender documentation  | Thursday 16th December 2021 |
| Deadline for applicants requesting an online Q&A slot  | Wednesday 22nd December 2021 |
| Online Q&A slots | Thursday 6th January 2022 |
| **Tender response deadline**  | **Monday 31st January 2022** |
| Interviews/Clarifications (if applicable)  | Friday 4th February 2022 |
| Notification of award | Tuesday 8th February 2022 |
| Contract start date | Monday 14th February 2022 |

**Duration of Contract**

The ESF-Workplace Health Champion Training Evaluation will start on Monday 14th February 2022 and will be completed on 31st December 2023 upon receipt of the final report

**Expected Value of Contract**

The maximum value of this contract is in the range of £90,000 - £100,000 including VAT and all the expenses to be charged in respect to the contract.

**Evaluation Criteria**

Please note that Active Lancashire requires an adequate response to ALL of the criteria. Tender submissions will be evaluated against the quality criteria using the scoring rationale as follows:

1. **Quality Criteria (70%) – Maximum 70 marks**

All questions carry a maximum score of 10 marks following the scoring criteria from Table 1 below. A multiplier (weighting) will then be applied to give the final score. If a question is weighted at 20% and a bidder obtained a score of 7 this would then multiplied by 2 to give a total score of 14 out of a possible 20. If a question is weighted 15% and an organisation obtained a score of 6 this would be multiplied by 1.5 to give a total score of 9. This methodology will be applied to each quality question and the scores added together to give the total quality score (Maximum 70 marks).

**Table 1: Scoring Criteria**

|  |  |  |
| --- | --- | --- |
| **Score** | **Performance**  | **Judgement**  |
| 9 - 10 | Exemplary response. Fully comprehensive and appropriate answer – fully meets the criteria set out in the question. The response clearly demonstrates how they would meet the criteria set out in the question. High level of confidence in bidder’s ability to deliver the essential requirements. | Excellent |
| 7 - 8 | Response of a high standard. Illustrates a high understanding and approach to the matter in question. Gives reliable substance to validate response. Good level of confidence in bidder’s ability to deliver the essential requirements.  | Very Good |
| 5 - 6 | Response illustrates a good understanding of the question. An appropriate response to the matter in question, but lacking reliable substance and evidence to validate response. Would benefit from further detail. Some confidence in bidder’s ability to deliver the essential requirements. | Good |
| 3 – 4  | Response illustrates a basic understanding of the matter in question but lacks detail. Gaps in response, not meeting the full criteria set out in the question. Some doubt in the bidders ability to deliver the essential requirements. | Satisfactory  |
| 1 - 2 | Very limited response lacking in any relevant detail. Illustrates a very limited understanding of the matter in question. Does not satisfactorily demonstrate how they would deliver the element in question. | Poor |
| 0 | Question not answered, or does not meet any of the criteria set out in the question and/or the provider fails to demonstrate how they would deliver the element in question. | Unacceptable |

1. **Price (30%)**

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 = $\frac{Lowest submitted price }{Your submitted price}x30$

For example, if the lowest price is £100 and the second lowest price is £115 then the lowest bidder gets the full marks (30), the second bidder gets 26 marks (100/115 x 30 = 26.08) and so on.

**Section A: Bidding Organisation Details**

|  |  |
| --- | --- |
| **Organisation Name**  |  |
| **Address** |  |
| **Contact Name** |  |
| **Job Title**  |  |
| **Telephone number** |  |
| **Email address** |  |

**Section B: Quality Criteria**

|  |  |  |
| --- | --- | --- |
| **1** | **Experience and expertise (Weighting 20%)** Outline your previous experience where you have provided services of a similar nature to this contract including details of the clients for which you have worked and describe your specific roles in each case. Please give a minimum of two examples and provide references who we may contact to verify the information provided.  | **Score (1 -10)** |
|  |  |
| **2** | **Methodology (Weighting 30%)** Describe how you would approach this evaluation and how you will meet all the requirements detailed in the requirements section above. The proposal should include details of the quantitative and/or qualitative methodologies to be utilised with a description of any areas of activity that would require other expertise to be sought by the tenderer.  | **Score (1 -10)** |
|  |  |
| **3** | **Project Plan (Weighting 10%)** Please provide a proposed timescale and programme for undertaking the work detailing key tasks and activities, and why this approach is feasible and effective based on your previous relevant experience. Please include your proposals for maintaining quality and providing management and reporting information. | **Score (1 -10)** |
|  |  |
| **4** | **Key Staff and their roles (Weighting 10%)** Please identify your key staff and their roles in each activity and explain how those members will have the skills and availability to provide the service to a high standard. If you wish, you can attach any CVs for key staff as an appendix. |  |
|  |  |

**Section C: Pricing Schedule**

If VAT is chargeable on the services to be provided this will be considered in the overall cost of this procurement contract.

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 Requirements**  | **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)

i) Period for which price will remain fixed (from closing date for quotes) …………………………..

ii) 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 for and on behalf of **[ORGANSATION]**

Name: ………………………

Position: ………………………

Signature: ………………………