



## Invitation for Proposals

**To: West and North Yorkshire Chamber of Commerce**

**For: The delivery of a series of business growth workshop for pre - starts, start-ups and young business as part of the AD:VENTURE programme.**

The West and North Yorkshire Chamber of Commerce are looking to engage a number of contractors to deliver a series of workshops across the Leeds City Region as part of the AD:VENTURE business support programme.

The AD:VENTURE programme provide ERDF funded growth support to pre-start, start-up and young business in their first three years of trading in the Leeds City Region. For further details please see: <http://ad-venture.org.uk>.

Annex 1 provides further details of programme eligibility.

The AD:VENTURE Programme is part funded by European Regional Development Funding.

## Requirement

Contractors will be required to deliver;

- a) Virtual and physical workshops that cover the themes set out below. Physical workshops will be delivered at a specified venue, virtual workshops will be delivered via an online platform.
- b) Virtual Workshops are expected to last no longer than 1.5 hours, with approx. 1 hour of main content delivery, allowing 15 minutes for initial client registration and tech check, and around 15 minutes for client Q&A and workshop close down. Workshops delivered virtually may require two or more sessions to cover more in depth content, where this is the case this will need to be delivered within a 7 day window.
- c) Physical Workshops are expected to be no longer than 3 hour, contractors will be expected to arrive at the specified venue at least 15 minutes prior to the workshop for set up purposes.
- d) Details of expected learning points and/or outcomes for participants. There should be a minimum of 3 learning points and /or outcomes. As a result of participating in a workshop an AD:VENTURE clients should have the additional skills, knowledge and tools to implement changes and improvement in their business. The contractor will need to provide appropriate resource such as; toolkits, checklists or action plan to enable and support client to achieve this aim.

Physical workshops will typically be delivered to a group of between 10-15 clients with a maximum of 20 participants (subject to room size), Virtual workshops will be delivered to a group of approximately 15- 20 clients with a maximum of 25 clients attending online, via the specified web conferencing software platform provided by AD:VENTURE.



Physical workshops will be delivered in locations across the Leeds City Region. AD:VENTURE covers the following Local Authority Districts;

*Harrogate, Selby, York, Leeds, Wakefield, Kirklees, Craven, Bradford, Calderdale.*

Number and frequency of workshops required will be determined by the programme and subject to demand from and popularity with AD:VENTURE participants.

Workshops should be engaging and interactive, enabling clients to ask questions and apply practical learning.

## **Workshop Topics**

We are looking for contractors that are able to cover the themes identified below. We would welcome proposals that offer specific topics that address areas identified within each of the key themes.

Please consider the section below as a broad description of the kind of proposals we would like to receive, rather than a prescriptive list of workshop titles or content. We would like contractors to use their own experiences of working with this particular client group to propose workshop titles and content that will appeal to and address the needs of AD:VENTURE participants.

Contractors can submit proposals for any 1 or more of the themes, and outline any number of proposed workshops under each theme to address the topics identified.

AD:VENTURE participants will come to the programme with different levels of existing knowledge & experience of the business topics below. To address this, where appropriate we would welcome proposal that include workshops or workshop series designed for these different levels of knowledge.

### **THEMES:**

#### **1. Marketing Your New Business**

For this theme we are looking for topics that will enable Ad:Venture participants to market their new businesses effectively. We would like the topics to focus on marketing for new business, the building and development of the brand, design and implementation of successful marketing strategies, as well as tools to support the optimisation of marketing approaches.

#### **2. Customer Management**

This theme will focus on topics that enable the business to effectively identify and understand their target client and audience. Sessions should provide an understanding of techniques to segment and profile clients and how to target marketing to different demographics. This would also include management of the customer journey, and how a businesses can improve that experience for their customer by implementing robust processes to support the client journey and user experience, ultimately increasing sales.

#### **3. Making Sales & “Selling” your Business**

This theme focuses on supporting business to make sales and sell their businesses and business model in a variety of contexts. This could cover a variety of topics including developing sales contacts, building networks on business platforms such as LinkedIn, how to effectively network physically and virtually, pitching the business for investment, and building an effective sales strategy.



## **4. Funding & Finance for Business**

Within this theme we are looking for topics that will help businesses understand their options for financing the business, this would include; grants, start up loans, business angels investment, loans, invoice and asset finance, crowd funding and alternative finance, venture capital and equity funding. We would also like topics that cover effective cash management, cashflow forecasting and financial planning for the business, aimed at supporting our clients to create a business plan and strategy that will help them to secure investment and resources to grow.

## **5. Staff & Developing your Team**

This theme will address the challenges for young businesses in recruiting and retaining the right talent for their business. As well as looking at the softer skills needed to build and develop a team and manage staff, this would also cover HR guidance, PAYE systems, pensions, NI and the legals and employment law obligations related to bringing on your first team members.

## **6. Business Strategy**

This theme will look to address the challenges for new businesses in terms of business planning and developing an effective strategy for growth. Looking at environment mapping and visioning, managing rapid growth and the varied challenges and opportunities that brings.

## **7. Website Creation and Optimisation**

This theme will look at the topic of website development and creation, website usability and accessibility, how to create, manage and maximise content, how to use website to generate traffic and sales, looking at SEO, keyword research, analytics, tracking and creation and management of ad campaigns including PPC.

## **Scope and Context for Contract Delivery:**

We are looking for a pool of contractors covering one or more of the specified topics across the Local Authority District areas. Contractors will receive 6 weeks' notice prior to the delivery of the workshop and will be called upon to deliver workshops as required.

Most participants on events will already be working with an AD:VENTURE Advisor, and referral onto events provided by the successful contractor will be the result of a need identified by the Business and Advisor. AD:VENTURE clients must demonstrate growth potential, further details of AD:VENTURE growth criteria are set out below. Although participants on Startup/ Scale up Workshop will need to have shown a commitment to growth, they may still be considering the scale of their growth ambitions.

Management of the online conferencing software, venues and booking process is not required as part on the contract, and all online registration, online feedback, venues, bookings, and client registration will be managed by the core AD:VENTURE Delivery team.

Although the contractors will not be expected to market events directly as part of the contract, the successful contractors will be expected to provide workshop descriptors. These must be detailed and written in a clear manner, SEO friendly and to include at least 3 key take ways / learning points the client will gain. This will be used to market events and communicate content of the event internally to existing clients, AD:VENTURE Advisors and project partners.



If suitable contractors are not identified North and West Chamber reserve the right not to appoint a contractor.

## Length of Contract & Scale of Delivery:

The contract will be for a period of 6 months with a review point after 3 months and a further option to extend for up to a further 12 months. Number and frequency of workshops required will be determined by the programme and subject to demand from and popularity with AD:VENTURE participants.

## Your Proposal

You are required to supply details on the following:

1. **Workshop Proposal:** Details of proposed workshop content. Comprising of a brief outline of proposed workshop content for any themes for which you wish to be considered. This should include the key learning points/participant outcomes and details of appropriate tools / checklists that will be provided to support the participants use of the content covered in the workshop in their business.
2. **Capacity to Deliver:** Details of your capacity to deliver including the number of trainers who would deliver the contract if this is more than one individual. You should also provide details of how you would ensure continuity of delivery in the case of staff illness or staffing changes. Please also confirm your availability for delivery (subject to agreement and 6 weeks' notice on dates) from June 2021 and for the full 6 months of the contract.
3. **Cost:** Details of the cost of your proposal. Please provide an inclusive *price per hour* for workshops delivered. If these are different please include a separate price of deliver for physical and virtual 'workshops'. If different prices are provided for physical & virtual delivery an average of the two prices will be used for any assessment of price.
4. **Previous Experience:** Examples of current/previous training, testimonials or references relating to your experience of delivering business workshops.
5. **Quality Assurance:** Please provide details of quality assurance procedures currently in place within the organization.
6. **Professional Indemnity Insurance:** Please provide details of your Professional Indemnity Insurance.
7. Your proposal for each workshop should be no longer than 1 side of A4, in addition to any examples of materials that will be used during the workshop.
8. Proposals from partnerships/consortia or group are welcome, however this should be through one lead partner with which the West & North Yorkshire Chamber will contract.

## Payment

Successful contractors will be paid on a monthly basis for all workshops delivered within the month. Payment will be made following submission of evidence of attendance, and subject to meeting minimum quality standards for event provided. Quality standards will be based on effective delivery, measured by inclusion of clear and actionable outcomes and positive



client feedback. Payment will be made based on the hours of workshop delivered & the inclusive hourly rate provide as part of your proposal.

## Selection

The decision will be made on your ability to demonstrate the following:

- Quality of the proposal and understanding of the needs of our business clients, as demonstrated by proposed workshop content.
- Previous experience of delivering to relevant clients.
- Price.
- Capacity of your organization to deliver to the contract requirements. .
- Quality assurance measures and processes in place.
- Professional Indemnity Insurance

Training need not be accredited but must demonstrate that it meets the needs of young growth businesses as per AD:VENTURE criteria:

Proposal will be scored on a 20%/ 80% price quality split, subject to a maximum price per workshop benchmark. Quality assessment will include; quality of the proposal and understanding of client need, previous experience & capacity to deliver. Quality assurance & Professional Indemnity will be assessed on a pass/fail basis.

The Chamber reserves the right to request additional information. Once the proposal has been evaluated, top scoring providers that pass quality assurance & professional indemnity criteria will be invited to interview and present to a panel regarding their proposal. The results of the presentation will used to amend initial quality scoring where appropriate.

## Deadline Date

Your response is required by: 12noon on Wednesday 7<sup>th</sup> April 2021

## How to return your Proposal

You are instructed to return your documents by email to:

[events@ad-venture.org.uk](mailto:events@ad-venture.org.uk)

Emails subject must be clearly marked:

**“Confidential – AD:VENTURE workshop Provision Proposal”**

You **MUST** respond by the date and time indicated to be considered.



## Timescales

Invitation for Proposals Open	12noon Tuesday 16th March 2021
Proposals completed and returned by	12noon Wednesday 7 <sup>th</sup> April 2021
Short-listing of proposals - Evaluating & Scoring	Between Thursday 8 <sup>th</sup> and Friday 9 <sup>th</sup> April
Invitations to presentation with short-listed contractors	WC Monday 12 <sup>th</sup> April 2021
Proposers informed of outcomes and preferred suppliers notified	WC Monday 26 <sup>th</sup> April 2021
Successful candidates to provide workshop availability (June – December)	WC Monday 3 <sup>rd</sup> May 2021
Delivery to Commence	June 2021
Review of Contract - with the option to terminate, or increase or decrease the scale of delivery beyond end date.	October 2021
Anticipated Contract End Date.	31 <sup>st</sup> December 2021



## Annex 1

### **AD:VENTURE Growth and Eligibility Criteria**

Pre-start/start-up businesses must be able to show they have the aspiration and capacity to increase annual turnover and employment by 250k and create 3 jobs within 3 years.

Established businesses must be able to show they have aspiration and capacity to increase annual turnover and employment by 500k and 5 jobs within 3 years.

AD:VENTURE is not able to Support;

- Non SMEs,
- Businesses outside of the Leeds City Region (Including Barnsley which although part of the Leeds City Region LEP area, it's not treated as such for the purpose of EU SIFs and falls within the Sheffield City Region)
- Businesses in the banking and insurance sector,
- Businesses in the nuclear or nuclear decommissioning sector,
- Businesses in the agriculture and fisheries, coal, steel, ship building and education sectors.
- Retailers or B2C businesses that do not meet the retail eligibility criteria.

### Retail Eligibility

The programme can only support retail and business to consumer businesses in limited circumstances. Any business with more than 50 % Business to Consumer activity must be able to clearly demonstrate that the support requested does not simply displace customers and market share from other similar businesses, but genuinely grows the market