

Commercial in Confidence

Invitation to quote for Business West, Skills West Telephone Survey and Appointment setting activity: Winter to Spring 2018/19

1. Background

GWE Business West Ltd (Business West) is a key player in delivering support solutions to businesses in the South West and is seeking bids from suitable organisations to conduct a telephone survey and SME appointment setting campaign for the Skills West project.

You are invited to submit a quote for the provision of both elements below:

- a. **Business Skills and Training Survey: a direct telephone survey (research) campaign to achieve against the required outputs**
- b. **SME appointments campaign for Skills West business advisers**

Skills West is funded through the European Social Fund and Education & Skills Funding Agency and commissioned by the West of England Local Enterprise Partnership/West of England Combined Authority. Skills West helps businesses to identify and tackle skills gaps whilst connecting them with local and national training providers to ensure they get the most relevant, quality training.

2. Supporting information

Skills West is funded through the European Social Fund (50%) and UK Education and Skills Funding Agency (50%) and has been commissioned by the West of England Local Enterprise Partnership. The West of England encompasses the areas of Bristol, Bath & North East Somerset, North Somerset and South Gloucestershire. The programme helps businesses and learners to identify and tackle skills gaps, connecting them with local and national employers and training providers.

1st and 2nd year results of the Skills West Business Skills and Training Survey are available in the form of [Local Sector Skills Statements \(LSSS\)](#). These statements cover 12 sectors and contain information on skills shortages, growth areas, recruitment and workforce development. The statements are available to individuals, businesses and training providers and are aimed at supporting the development of future training provision and suitably qualified resource.

3. Requirements

3.a. Business Skills and Training Survey:

One of the key outputs for this project is the completion of a Business Skills and Training Survey by West of England businesses. The objective of the survey is to gather intelligence to feed into the overall West of England Skills Strategy. The survey gathers information on skills shortages, recruitment and workforce development across West of England businesses. The results are analysed to produce Local Sector Skills Statements and are fed into the West of England Combined Authority Skills Strategy; which in turn is used to inform local businesses and help training providers to develop future training provision. Skills West have already carried out a series of telephone research activity and engaged over 1,500 businesses in the region. This second phase of activity is to increase outreach and engage additional businesses across the region.

3a.1 Target audience for survey:

- Businesses of all size based in the West of England area encompassing the areas of Bristol, Bath & North East Somerset, North Somerset and South Gloucestershire (eligible postcodes will be provided).
- Primary target SMEs with 3-250 employees, however we do wish to approach a number of businesses above this band. Particularly key anchor businesses across the region.
- A percentage of the survey and appointment respondents can be sole traders but not more than 20% of responses.
- The successful awardee will be asked to focus on specific industry sectors (as directed by Business West) for the purposes of this phase of the survey. These sectors will be drawn from the 12 [West of England LEP priority sectors](#).

3a.2 Additional Information

As part of the Skills West project a Business Skills and Training survey was already carried out between January and August 2018.

Therefore, this part of the project will contain two elements:

I. **Completion of the relaunched 2018 Skills West Business Skills and Training Survey by new businesses to Business West.**

- The new 2018 survey has been used in a previous telephone campaign from January to August 2018, this will be the same survey used.
- The Skills West Business Skills and Training Survey length and depth will remain the same. <https://www.smartsurvey.co.uk/s/I8VVC/> (this is attached)

The survey consists of 5 sections:

- About the business
 - Recruitment
 - Skills and Training – this section is split between sector specific questions and a general set of questions
 - Apprenticeships
 - Working with Education and Training Providers
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- Routing is built into the survey which means the completion of the survey can take varying amounts of time. We estimate that the survey will take between 10-15 minutes to complete.
 - The tender will require at least 1,200 – 1,400 businesses to complete this survey.

II. Re-approach businesses that participated in 2017 survey to take the shorter 2018 version.

- This retake survey is shorter, and the objective is to find out how business' skills needs and priorities have changed since taking the first survey.
- The survey has approximately 12 questions (dependent on routing) and is anticipated to take between 5 – 8 minutes to complete.
- The Skills West Business Skills and Training Survey length and depth will remain the same. (This is attached)
- The tender will require at least 200 businesses to complete this shorter survey.

3a.3 Summary of Requirements

- Minimum of 1500 completed surveys are required to be returned on a regular weekly basis over an agreed timetable by **15 March 2019**, to be split by approximately 80% new 2018 surveys and 20% retake surveys.
- Surveys are to be completed by telephoning key business contacts and completing the survey on their behalf with them. If this is not possible, permission should be gained to send an email with a link to an online version of the survey for independent completion.
- All fields of the survey must be completed including 'N/A' where no other field is appropriate. The price is per output and we will pay on complete survey which is in area.
- A draft call script is required which must demonstrate understanding of the Skills West survey proposition, to be agreed with Business West.
- Work with Business West to ensure a clear and simple process is agreed to record clients who do not complete the survey over the phone but are sent the survey link by email, to allow Business West to monitor/follow-up on these as appropriate.
- Only one survey per organisation can be counted.

- Excel spreadsheets of completed survey results should be returned twice a week. It is expected that individual pdfs of the full completed surveys, in an agreed format with logos, are returned on a weekly basis.
- Payment will only be made on completed surveys from West of England businesses
- Payment will be made monthly per eligible output

3a.4 Supporting information

- As an incentive, each business completing the survey will be entered into a prize draw. Every person who completes the survey will also receive a final report of the findings.
- Whilst the telephone will be the primary channel for capturing survey responses, the survey will continue to be promoted via various social media and digital channels. It will also be promoted by a range of partners to their business networks. Therefore, Business West will provide a weekly report of new survey respondents to ensure there is no duplication.

3.b. SME appointment campaign for Skills West Business Advisers

Organisations are also invited to submit a proposal alongside 3.a. for the provision of telemarketing services to generate Skills Adviser appointments for the Skills West programme.

The other key output of this project is the provision of impartial SME business skills advice by a Skills West Adviser. Skills West offers businesses free impartial skills advice and support to understand skills and recruitment challenges and help source training relevant to their business needs; this can be anything from short training courses, internships, work experience support through to apprenticeship recruitment. The team can also provide advice on apprenticeship funding – which can be used for existing and new members of staff, this is something that businesses are not often aware of and is another source of support for their business growth plans.

3.b.1 Target audience for appointment setting:

- All businesses must be registered or have an office location within the West of England LEP area. (postcodes provided in Appendix A)
- For the appointment setting campaign, businesses must have SME status (between 3 to 250 employees). Sole traders can be included but proof of status (e.g. Unique Tax Reference Number) must be produced prior to the appointment taking place.
- The priority industry sectors for appointment setting will be directed by Business West and will be drawn from the listed West of England LEP priority sectors.

- The key contact will be dependent on the size of the business, where there is an HR function the HR/training manager is the appropriate contact, in smaller businesses it will be the Managing Director/Owner.

3.b.2 Additional Information

The Skills West project commenced in 2017 and whilst we have a number of companies in our pipeline there is a need to increase this figure in order to achieve outputs. To overcome this, we are looking for support to increase business engagement and hope to do this through a targeted telemarketing appointment setting campaign.

3.b.3 Summary of Requirements

- We would like the campaign to generate 40 appointments per month with scheduled appointments taking place no later than **29th March 2019**.
- Work with Business West to ensure a clear and simple scheduling and confirmation process is agreed to record clients who agree to an appointment with a Skills Adviser
- Only one appointment per organisation can be counted.
- Appointments can be made for advisers through various channels; face-to-face, skype, telephone.
- Payment will be made monthly on confirmation of meetings (ideally meeting request accepted using Microsoft Outlook)
- Businesses must have SME status. Sole traders will be accepted although they must be prepared to provide proof of sole trader status prior to their appointment (e.g. Unique Tax reference Number)

4. Data

For this phase of the 2018 survey and appointment setting campaign, Business West will provide a limited amount of data from its CRM system, this will be of varying degrees of data quality. There will be a requirement for new data to be purchased, please include costings for this in your price per output if appropriate.

For the retake survey, Business West will provide the data of individuals who have previously taken the 2017 survey and have not yet taken the 2018 survey. Business West will work with the successful supplier on marketing and communications around this.

All businesses contacted throughout the campaign must be made aware of the ESFA data protection policy, and the purpose for which their details are being recorded at the point of first engagement. The ESFA Data Protection policy will be provided.

Business West's data protection policy can be found [here](#)

5. Process

Within your quote we ask that you briefly explain your planned approach and your Project Management process and approach to GDPR.

6. Price

We ask that you provide a price for each of the sections of the project:

a. Business Skills and Training Survey:

- Please provide a price per survey completion for the new 2018 survey which includes data purchasing.
- Please provide a price per survey completion for the re-approach to businesses that have taken the 2017 survey.
- Please provide an expected number of survey completions split between 2018 and shorter retake survey.
- Please include a price for set up costs if not included in price per survey.

b. SME appointment campaign for Skills West Business Advisers

- Please provide a price per telephone conversion which results in an appointment set and confirmed (ideally through an accepted meeting request via Microsoft Outlook).
- Please provide the number of expected total appointments.

The total price of this contract is not expected to exceed £40,000:00 (forty thousand pounds) exclusive of VAT and this must include any associated set up costs including additional data purchasing.

Your quote should include the cost proposed (exclusive of VAT), payment terms and a profile of invoicing over the term of the contract.

7. Assessment Criteria

Applicants are required to provide evidence of the following in respect of the scope of work defined:

- a. Experience and understanding of Skills programmes and issues.
- b. 3 recent examples (within the last two years) to demonstrate a successful track record of working with similar business support organisations.

All applicants will be subject to Business West Vendor assessment and credit check prior to any contract being awarded. Proposals will be rejected if the applicant fails the vendor assessment or credit check, or are unable to provide the correct policies.

Your quote will be evaluated upon the following criteria:

- knowledge of the subject matter (experience and understanding Skills programmes and issues)

- capability and capacity to deliver the quantity of responses (planned approach, project management process)
- experience of previous assignments (successful track record of working on similar assignments)
- value for money
- Your proposal response should not be more than 10 pages.
- An overview of Business West's evaluation approach is attached.

Please submit a copy of your policies:

1. Equality and diversity
2. Health and safety
3. Data protection
4. Sustainability

Please could you also provide an explanation about how you will approach the project in relation to the changes in GDPR.

8. Clarification Questions

Any questions relating to the clarification of any aspect of this invitation to tender must be made in writing via email to: procurement@businesswest.co.uk

by **Monday 3rd December 2018**

including *"ITQ for Provision of Skills West telephone Campaign"* in the subject line of the email.

Questions must be received no later than 12:00pm on **Monday 3rd December 2018**.

Business West will post responses to such requests on the Business West website (including a description of the enquiry without identifying the source) on or before **Tuesday 4th December 2018**. <https://www.businesswest.co.uk/tenders>

9. Timescale

Please email your quote to procurement@businesswest.co.uk entitled:

Quote for Skills West Telephone campaign 2018 Project: name of your company

The closing date for receipt of tenders is strictly 12:00pm on **Sunday 9th December 2018**.

The contract will be awarded as soon as possible after this date and we are looking for the work to commence **no later than Monday 17th December 2018** and to end no later than March 2019.

10. Tender Process Timetable

Action	Target Date for Completion
Contract Notice published	Wednesday 28th November 2018
Deadline for receipt of written ITQ clarification questions from Tenderers (by 12:00pm)	Monday 3 rd December 2018
Responses to ITT clarification questions by	Wednesday 5 th December 2018
Closing date for receipt of Tenders (by 12:00pm)	Sunday 9th December 2018
Evaluation	Monday 10 th December 2018
Notification of award	Wednesday 12 th December 2018
Commencement no later than	Monday 17 th December 2018

Terms and Conditions

The contract will be awarded subject to Business West's standard terms and conditions.