

16th July 2021

INVITATION TO TENDER

for the provision of training and advisory support services to Scottish food and drink businesses for "SUPPLIER DEVELOPMENT - WORKING WITH MAJOR RETAILER & FOODSERVICE PARTNERS"

QUOTE Reference: SFD_DEVACAD21_SP_02

You are hereby invited by Scotland Food & Drink (SF&D) to quote for the provision of services detailed in this invitation to tender (ITT).

Your response must be in accordance with this ITT, and include specification of requirements, evaluation and price summary.

Your quotation must be received by 12.00pm Friday 30th July 2021.

Scotland Food & Drink is not bound to accept the lowest price or any quote and shall not be bound to accept the supplier as a sole supplier. Prices quoted shall remain firm for the duration of the contract. Value Added Tax (VAT) should be shown separately.

It is your responsibility to obtain at your own expense any additional information necessary for the preparation of your response, and you will be responsible for any expenses incurred by you during the tendering process.

If your response does not accord with all the requirements of this ITT, it may not be considered.

Should an interview stage be required, we anticipate these will take place on 6th August. Please make provision for these dates. Interviews will be held virtually.

Enquiries should be emailed to ukmd@foodanddrink.scot noting the Quote Reference in the subject line.

Tender quotations should be submitted to capability-tender@foodanddrink.scot

Scotland Food & Drink

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PART 1 – BRIEF

Introduction - About Scotland Food & Drink

Scotland Food & Drink (SF&D) is the industry leadership body tasked with driving responsible, profitable growth of the country's farming, fishing, and food and drink to £30 billion by 2030 (Ambition 2030). Working collaboratively with Government and industry, we support businesses to thrive and grow. We are a membership organisation with over 400 businesses and organisations at our heart. Our mission is bold yet simple. We want Scotland to be the best place in the world to do business.

Background

The programme “Supplier Development – Working with Major Customers” is implemented by Scotland Food & Drink. It sits within the framework of The Academy, delivered by The Scotland Food & Drink Partnership, supported by The Scottish Government. Supplier Development is a key action in Scotland’s Home Advantage Strategy and Recovery Plan.

Building on the foundation of The Academy, SF&D plans to develop a number of supplier development programmes in partnership with major UK retail and foodservice partners (Named Account/Partners).

SF&D seeks to appoint a lead Provider to support delivery of Supplier Development training. This opportunity is for a call off agreement. It is anticipated that the contract will commence August 2021 for a period of 1.5 years (March 2023) with the option to extend beyond this timeframe, subject to funding agreements. It should be noted that there is no guarantee of any level of work from the tender.

Budget

The total budget for this tender will not exceed £250,000 for the duration of the contract. Scotland Food & Drink is not bound by any minimum purchase requirement.

Further development programmes will be addressed as separate tenders.

Scope of Tender

This is a national programme available to businesses in all regions of Scotland. An estimated 200 businesses are expected to access support over the 2-year period; therefore, capacity to deliver is essential. The estimated split is as follows:

Activity	No. Businesses per Activity	No. Activity over 1.5 Year
Major Retail/Foodservice Programme	20	10

It should be noted that a degree of flexibility is expected, which should be factored into the response.

Supplier Development – Working with major retailer and foodservice

The Provider will need to demonstrate that they have relevant expertise, knowledge, and solid experience in training a wide range of businesses in the food and drink sector, specifically, in training individuals with a commercial remit. They must have a deep understanding of the major retailers and foodservice operators in the UK market, including an awareness of the current and emerging competitive challenges facing businesses operating in these channels.

They will:

- Provide training in commercial skills
- Advise on market opportunities
- Supply recommendations / action plan

Scotland Food & Drink expects Training Providers to understand the nuances of the major retailers and foodservice operators, what's involved when trading with different accounts, and be able to support participants with their business development and account management strategies.

The methodology for the training is based on a one-to-many and one-to-one approach to be delivered in an online environment, with elements that may be delivered in person; it should use a combination of techniques.

Providers must be able to:-

- provide a highly interactive learner experience
- deliver real world insights
- utilise industry networks to highlight opportunities and support available
- share best practice
- offer practical advice and commercial guidance
- support delegates to develop an actionable plan

The output is an agreed tactical plan for implementation that will improve the realisation of business benefits following implementation.

Target audience

The programmes will be aimed at food and drink manufacturer's who may be new entrants to retail and foodservice and looking to explore new opportunities and/or established brand/own label businesses who are already supplying the Named Account and seeking growth.

Expected results

The expected results of the programme are:

- Increased knowledge of Named Account/Partner and their expectations of suppliers
- Increased awareness of the opportunities for suppliers with Named Account/Partner
- Increased confidence to drive commercial change
- Increased sales impact at regional (Scotland) and national UK level

Tender Response

Tenderers should structure their response as detailed below. Responses will be scored using the weighting detailed in the tender evaluation.

1. Submission

A single tender submission is required. Your submission should be clearly marked with the name of your organisation and emailed to Scotland Food & Drink as detailed in the ITT.

2. Company Information

Please provide the following information:

- Registered company name, number and office address
- Description of main services provided
- Summary extract of accounts for previous 3 years

3. Support Team

Provide a diagram showing the delivery team structure, including sub-contractors/associates who will support delivery of the project. Describe their roles and responsibilities and provide a brief CV showing their experience, expertise and qualifications - both technical and specific sector expertise and how it will be used to deliver the contract.

Please provide details of how the team will interface with SF&D. You should provide details on how you will quality assure any sub-contractors/associates.

4. Understanding of Requirements

Demonstrate understanding of retail and foodservice channels and the main UK operators, the food and drink landscape in Scotland and the needs of the sector, and business and commercial development growth methods. The requirement is for a bespoke training programme for each organisation, with the advisory support element tailored to each participant, including the development of an action plan.

5. Methodology and timescales

Show how you propose to deliver the training detailing your approach. Please explain the techniques you would use and how you would tailor this for each bespoke programme. Provide a sample schematic of a typical programme. Explain how you would approach individual company support.

Note: Named Account/Partners are unconfirmed; therefore an element of flexibility in approach should be factored in.

6. Innovation

Detail any innovative suggestions in your methodology. SF&D welcomes innovative ideas and suggestions to improve the design approach. Detail how you would contribute to the programme design using evidence of collaborative approaches working with retailers and foodservice operators you have been involved in to support your proposal.

7. Capacity

Detail how you will deploy resources to meet demand including during periods of absence. This section should also demonstrate how you will meet demands of competing work should multiple programmes be required at the same time.

8. Interviews

All candidates taken forward to interview stage will be asked to give a short presentation lasting no more than 20 minutes which will be assessed by an Evaluation Panel. Your presentation will be based upon the work being tendered through this process.

Potential selection interviews are anticipated to take place on 6th August. If you are required to attend an interview, we will confirm a timeslot with you at least one week before this date. Interviews will take place virtually.

PART 2 – SPECIFICATION OF REQUIREMENTS

General

Scotland Food & Drink is looking for a lead Training Provider to support the delivery of supplier development programmes with major retailer and foodservice Partners. The approach will combine the deep knowledge of the Named Account Partner(s) with the expertise of external specialists (Provider) to deliver training and advisory support that is insight-led and commercially focused to help businesses build knowledge, explore new opportunities and grow.

Objectives

The objective of this tender is to prepare businesses with an ambition to grow in retail and/or foodservice markets through market entry or penetration to develop an action plan, identifying opportunities and reducing risk of failure with their chosen target customer, and generate greater success and a higher return for the business.

Each programme will be co-designed and delivered as separate activities.

SF&D and the Named Account/Partner will jointly agree the scope of the programme(s). A brief will be provided by SF&D outlining the project and deliverables agreed. This will give an overview of the design prior to a meeting between SF&D, the Partner and the Provider. It is anticipated that further details of the programme will be developed and agreed at this meeting.

The aim is to provide training and advisory support to businesses resulting in an action plan with recommendations that will allow the delegate to develop an initial approach and/or commercial proposal to take to the Named Account. It is anticipated the businesses will have the opportunity of a one-to-one meeting with the Named Account at the end of programme.

The key elements of the programme are expected to be:

1. Training module(s)
2. One-to-one advisory support
3. Action Plan

Training module(s)

The training module(s) are expected to be deep dive insight-led workshops, delivered predominately in an online environment; some may be in person. It is anticipated that modules will be co-delivered with the Partner, with the Training Provider also acting as the facilitator throughout. The level of input from the Training Provider will vary for each programme, depending on variables such as the amount of content the Partner wishes to deliver, number of workshops, duration of programme, etc.

We anticipate two typical programme types:

- a) Singular module - equivalent up to 1.5 days workshop
- b) Multiple modules – equivalent up to 5 days workshop

Each programme is expected to be bespoke. It may cover, but not limited to the following topics: strategic overview and priorities of Named Account; policies such as CSR; supply management models; expectations of suppliers; SME support; marketing and promotion; NPD/innovation (brand and own label approaches); terms of business; trading and future opportunities

One-to-one advisory support

Each programme is expected to have an element of one-to-one advisory support. It is anticipated that each business will receive personalised support from a mentor aligned to their individual business need. This is the sole responsibility of the Training Provider. The amount of support provided to each business will differ, depending on their developmental need. However, for the purpose of this tender, it is assumed that businesses will require a minimum of 4 hours one-to-one support.

Action plan

The outcome is an agreed commercial action plan for implementation with the Named Account. The Training Provider will be expected to work with the participant to guide and help them to develop a tailored action plan for their business. This should form the basis of a commercial proposal to present to the category buyer and/or development team of the Named Account at the end of the programme.

Scotland Food & Drink views the above detail as in principle and welcomes creative recommendations that may add value and impact to this approach.

Scope of Services

Successful contractors will assume responsibility for the services outlined below.

1. Planning and design, preparation and organisation, and delivery of training programme(s), in collaboration with SF&D and Partners, as appropriate
2. Development and implementation of appropriate training methodology including suggestions and innovative ideas for the programme(s); training modules may include guest speaker sessions, case studies, exercises, Q&A and panel discussions, as appropriate. Content to be agreed with SF&D prior to delivery
3. Support the application process of pre-recruited applicants and once delegates are onboarded, retain numbers throughout each programme
4. Mobilisation and provision of trainers and speakers for each programme
5. Preparation and dissemination of training materials, including teaching aids and reference materials to accompany each programme
6. Coordination of sessions between itself, Partners and SF&D
7. Organisation and coordination of sessions between itself and delegates
8. Provision of one-to-one tailored support; mentor to be assigned to each delegate to advise and guide development of action plan
9. Administration of programme(s), including maintenance of records, including attendance timesheets and delegate feedback survey's
10. Collation of data to allow training to be tailored to the needs of delegates
11. Evaluation of feedback from delegates, applying continuous process of improvement throughout. Any modifications to programme to be agreed with SF&D
12. Provision of reports on the evaluation, impact and outcomes of training programme(s), as applicable. Evaluation methodology to be agreed with SF&D
13. Work to agreed guidelines in all delegate communications, including the use of SF&D and Partner logos and branding on presentation templates, programme materials and other documentation
14. Submit all end of project documentation to SF&D, including records, materials and reports within 4 weeks of programme end

Out of Scope

Scotland Food & Drink will be responsible for the following:

1. Management of Partner agreements; each programme will be negotiated and confirmed prior to call off
2. Recruitment of delegates; a process for identifying and qualifying delegates will be implemented at the start of each programme
3. Collection of delegate fees
4. Organisation of facilities such as any venues and catering required
5. Communications and media activity
6. Independent evaluation at the end of the programme

Structure of Response

Management and Delivery Methodology

Please detail how you would manage and deliver the support and programme objectives, including your understanding of the project requirements as outlined in this document. Tenderers should demonstrate expertise in providing training and commercial advice to SME's, and should have a sound understanding of:

- Retail and foodservice channels and the major operators
- Development of Commercial action plans
- Insight and resources required to effectively market products
- Up to date and current training methodologies

Your proposal should explain the rationale for your approach and your response should include innovative ideas to enhance the programme. Providers should demonstrate how they will ensure the objectives are being achieved. You should identify how your methodology would differ depending on the typical programme types outlined in the objectives and outline how you would support bespoke programmes of Named Account Partners.

Key Performance Indicators will be applied to the contract including:

- Meeting of contract objectives
- Quality of service
- Positive shift in confidence of participating businesses
- Satisfaction of participant with Training Provider and mentor

We would expect that tender responses will not exceed 20 pages; however, most responses will be below this figure.

Outputs and Milestones

The objective is to provide insight and advice to participants resulting in an agreed commercial action plan that highlights any issues or gaps and recommends next steps, enabling the participants to develop their own commercial proposal that may be used to progress potential opportunities with the Named Account. It is important to ensure that there is momentum for implementation beyond the

creation of the plan as the success of the programme will ultimately be determined by the action taken by the participant as a result and the benefits gained.

After the action plan has been agreed with the participant, a report should be submitted to SF&D summarising the plan, outcomes and recommendations for further support as appropriate.

Each programme is expected to deliver the following outputs.

- All participants access market insight
- All participants connected to specialists
- All participants receive personalised support
- All participants develop a commercial action plan
- Report on each business with recommendations for future support

The expected timeline and key milestones for the project are as follows:

Tender Out	17 July 2021
Tender Close	30 July 2021
Interviews	6 August 2021
Contractor Appointed	13 August 2021
Programme Delivery Commences (no. 1 of 10):	September 2021
Review	Within 4 weeks of end date

It should be noted that the above dates are viewed by Scotland Food & Drink as in principle.

Fees and Costs

Tenderers must provide a **single** day rate and proposals should clearly identify details of the staff that will deliver the support.

The rate (excl. VAT) will be based on a 7-hour working day. Providers should detail their day rate on the Pricing Schedule. Your rate must be inclusive of all costs associated with the programme including travel and subsistence.

SF&D will contract directly with the Provider. Businesses benefitting from the support will make no financial contribution to the Provider.

Rates and prices shall be deemed inclusive of all additional expenses howsoever incurred.

Contract Management

All tender submissions must show how outputs will be profiled for delivery throughout the project and how they will be accurately measured, recorded and reported.

Attendance at monthly project meetings will be required and written performance reports, financial analysis and target delivery will be reported monthly.

Costs for providing management support and information and attending meetings, should be factored into the day rate.

Call Off Procedure

SF&D wishes to appoint a single Provider for this tender, with individual commissions being awarded on a call off. The successful Provider will be the highest ranked bid identified in the evaluation.

Once the Provider is appointed, the call off process will operate.

The call off process will be subject to the requirements of the Named Account/Partner and will be commissioned as required.

The Provider must be able to carry out the work within the timescales agreed at contract award or as demand requires.

In the event of a capacity constraint, conflict of interest, inability to respond to lead time or the Named Account/Partner stipulating an alternative preferred Provider, commissions may not be awarded to the appointed Provider.

PART 3 - TENDER EVALUATION

Tender Evaluation Criteria

Price & Quality

All submissions from Providers will be scored on both price and quality. The contract will be awarded to the Provider who receives the highest total score. The overall price: quality split for this tender will be 40%: 60% respectively.

Any mandatory requirements or thresholds identified in the brief must be met before the submission will be evaluated further. You must address each of the evaluation criteria in your submission in order to receive a score.

Please note that submissions will not be considered further if the above requirements are not met.

Price Criteria	Weighting %
Total tender cost ex VAT (i.e. number of days x contracted day rate for all work less any applicable discounts)	40%
Total	40%

Quality Criteria	Weighting %
Demonstrable track record and experience of delivering commercial skills training in a food and drink market context to SME's where the individuals/audience have had a commercial remit e.g. 2 previous examples of recent work relevant to this contract with indicative timeframes, contract value, evidence of technical capability and outcome-based successes.	10%
Experience of working with UK major retailers and foodservice operators to deliver/co-deliver training, e.g. 2 previous examples of work relevant to this contract with evidence of collaboration and co-delivery of training	10%
General understanding of the brief and capacity to deliver services as outlined in the specification of requirements	10%
Proposal and methodologies, detailing your strategic approach to delivering quality and innovation	20%
Experience and expertise of the proposed training personnel	10%
Total	60%

Each of the criteria will be scored using the scale below:

0 – Unacceptable – Nil or inadequate response. Fails to demonstrate an ability to meet requirement

1 – Poor – Partially relevant but generally poor response. Demonstrates some understanding of the requirement but contains insufficient/limited detail or explanation to demonstrate how the requirement will be met

2 – Acceptable – Relevant and acceptable response. Demonstrates a broad understanding of the requirement but lacks detail or explanation to demonstrate how the requirement will be met in certain areas

3 – Good – Relevant and good response. Sufficiently detailed to demonstrate a good understanding of the requirement and provides an explanation of how the requirement will be met

4 – Excellent – Completely relevant and excellent overall response. Comprehensive and clear and demonstrates a thorough understanding of the requirement and provides a concise and persuasive explanation of how the requirement will be met in full

It should be noted that we have not specified any word restrictions. Integral within your assessment will be your demonstrated ability to answer the questions in an open clear and concise manner.

Scotland Food & Drink may undertake, if deemed appropriate, meetings with tenderer(s) to clarify / verify their tender submissions.

PART 4 - PRICE SUMMARY AND TEMPLATE

Price

Prices shall be deemed inclusive of all additional expenses howsoever incurred. Whilst it is not a criterion for selection of Providers, SF&D encourages additional expenses not to exceed 10% of the total contract value. Providers are encouraged to pay the Living Wage to their employees and to promote payment of the living wage throughout their supply chain.

Price Summary Template

Tenderers are required to submit a firm price for the services detailed ex VAT. All costs appropriate to the proposal must be included here. Costs which appear elsewhere in the proposal, but which are not summarised here will be presumed to have been waived.

Activity	Total No. Hours	Price £ (Ex VAT)
Example 1: Singular module programme delivery, eg. Planning, Meeting Partner, Workshop Delivery	Day Rate	
Total Price (Ex VAT)		£

Tenderers must also provide a breakdown of the staff involved in this contract and highlight the discounted rate that is being applied. This must also include any volume rebate or service credit mechanism which is being applied to this call-off contract.

Personnel	Position	Hours Input	Activity	Hourly Rate £
				£
				£
				£
				£
				£

PART 5 – TERMS & CONDITIONS OF CONTRACT