



Forward Pipeline Guidance Tool



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Introduction

Healthy, competitive markets matter because they support our ability to achieve value for money for taxpayers and drive innovation in delivering public services. Good market management is about looking beyond individual contracts and suppliers. It is about designing commercial strategies and contracts that promote healthy markets over the short, medium and long term.

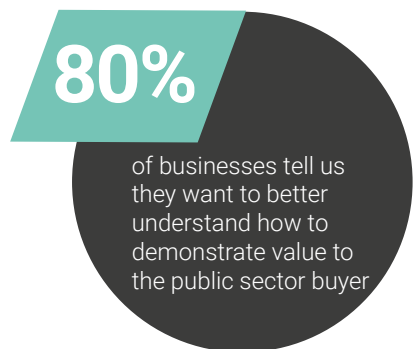
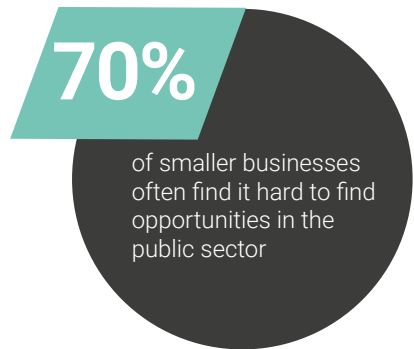
Small and voluntary organisations have the potential to play a huge role in the provision of services and resources within the public sector. Spending money with SMEs (Small to Medium Enterprises) and VCSEs (Voluntary, Community and Social Enterprises) not only drives social value and provides a boost to local economies, but often smaller organisations hold the key to local knowledge, operating with an agility and responsiveness that the public sector needs.

It is still true, however, that it can be disproportionately harder for smaller and voluntary organisations to take part in public sector opportunities. Research by Go4Growth¹ tells us that 70% of smaller businesses often find it hard to find opportunities in the public sector, with 78% keen to develop their bid skills in order to better take part. The public sector competitive landscape can be a complex environment and 80% of businesses tell us they want to better understand how to demonstrate value to the public sector buyer.

For the purposes of this guide the definitions being used are:

Micro/Sole Trader	<10 employees, turnover <£1.7m per year
Small Business	<50 employees, turnover <£8.2m per year
Medium Enterprise	<250 employees, turnover <£41m per year

¹2,500 businesses engaged through multiple channels - www.go4growth.co.uk



The role of the Forward Plan

Planning ahead can be crucial to smaller organisations, as the ability to look forward to what opportunities are coming and manage your scarce resources can often be the difference between being able to take part and not.

Diverse business communities represent a way of broadening competition in a market and can therefore help drive value for money. However, where mixed economies are used, care is required to create a level playing field between public, private and third sector providers.

In a recent poll of 100+ businesses attending a Go4Growth event on Finding & Understanding public sector opportunities, 94% said that having one central database for all future opportunities would be helpful in their ability to plan and ultimately take part.

63% of respondents had never taken part in competitions before and 60% said they had not registered on any procurement portals.

Talking to the market can help promote forthcoming procurement opportunities and provide a forum to discuss delivery challenges and risks associated with the project.

It is good practice to openly announce any preliminary market consultation by publishing a **Prior Information Notice (PIN)** and/or early market engagement notice or future opportunity notice on Contracts Finder² and/or Find A Tender Service³.

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said that having one central database for all future opportunities would be helpful in their ability to plan and ultimately take part

63%

of respondents had never taken part in competitions before

60%

said they had not registered on any procurement portals

²<https://www.gov.uk/contracts-finder>

³<https://www.gov.uk/find-tender>

Barriers to Entry

Barrier	Detail	Do	Don't
Language	Procurement, commercial or legal terms can often be difficult for smaller organisations to decipher	Use plain terms, in basic language Explain legal context and key needs where possible	Use technical words or terms such as "Invitation To Tender" "Aggregation, Dis-Aggregation or Unbundling"
Language	Use of acronyms can confuse. Often an acronym will have several meanings. For example SME could be Small to Medium Enterprise or Subject Matter Expert	Spell everything out in full (at least the first time of use) Consider including a glossary where needed	
Language	Using different terms for the same thing can be confusing for providers	Agree the naming convention. For example, always use temporary labour rather than contingent labour Compile a glossary of terms (with alternative names to aid provider searches and understanding) Ensure this is consistently applied across all Anchor Institutions	Use acronyms on their own without an explanation.
User experience	Pipelines and competition opportunities can be difficult to find	Ensure the location of the pipeline is visible and easy to find with minimal clicks Produce guidance on how to use the pipeline Consider accessibility of information for those with additional needs or disabilities	
User experience	Searching for opportunities within the pipeline can often be complicated	List similar or same category/sector opportunities (across different Anchor Institutions) together so that providers can see any and all of a certain type of opportunity together	Assume that providers will understand technical, legal or sector terminology
User experience	Searching for opportunities within the pipeline can often be complicated	Ensure that pipelines are generated in a format that can be filtered by different information sets such as value, sector, category, CPV code etc.	
Information	Getting the right level of detail can often be challenging. Providers need sufficient detail so as to make the information useful	Include background information on your organisation Ensure the Key Needs are documented	Changes/amendments are inevitable, and providers understand this. Don't avoid populating the pipeline based on likely changes that will come
Time	It can often take time for providers to prepare for bids, so early sight of opportunities is a crucial part of the micro and small business planning process. Bidding itself can also be a key barrier to taking part.	In addition to considering planning time, also consider in your own planning processes how much time a micro or small provider may need to undertake the bid process and allow maximum time wherever possible. Through early sight of future opportunities and adequate time to bid, greater engagement can be encouraged.	



When and how to produce the Forward Plan

The National Policy Statement⁴ 'issued June 2021 via PPN 05/21' states that "Contracting authorities should publish annual pipelines of their planned procurements and commercial activity, looking forward at least 18 months but ideally three to five years."

The Forward Pipeline is a living, fluid activity that will be constantly being updated. In order for the marketplace to get the maximum use, the pipeline should be as dynamic as possible. This may require a shift from a static frequency of updating (such as annually) to more regular and dynamic updates such as monthly or to updating as and when the process requires.

- DO** Amend the central pipeline document with any changes as and when they happen

- DO** Ensure that at each process point, the pipeline reflects the most up to date version of the opportunity

- DON'T** Wait until the opportunity is finalised to tell the market about it

- DO** Ensure the market understands that the pipeline is not static and will be evolving constantly; help guide them to check it often and help them understand how they can be notified when the opportunity becomes live for bids

- DO** Promote the pipeline and its usefulness for providers regularly (see Disseminating Information for suppliers & analysing success)

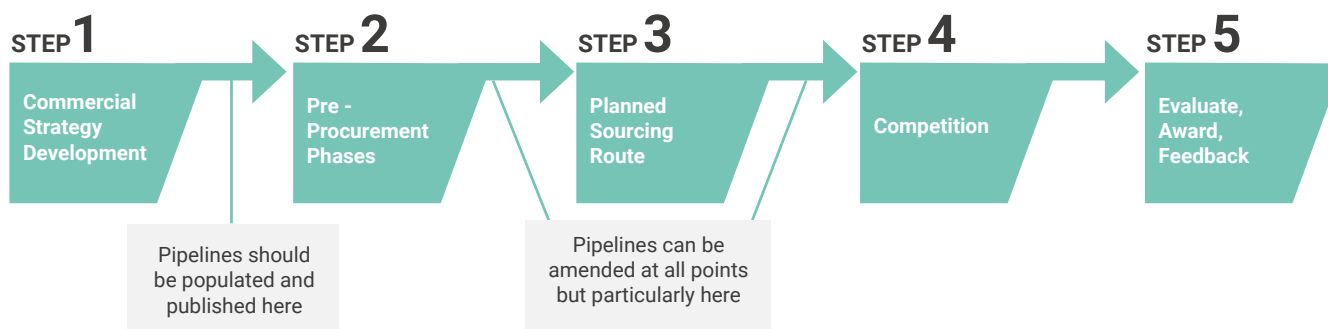
NB: Whilst we're not recommending any push notifications for pipelines at this point, this may be something that is developed in future iterations. Currently push notifications are in operation on government portals such as Contracts Finder and Find A Tender Service and all procurement portals.

- DON'T** Assume suppliers are registered on portals or have clear knowledge on how to set up alerts or find opportunities

- DO** Regularly signpost to free support materials on how to access portals, how to register and set up alerts such as: <https://youtu.be/1b0syxhco3Q> for Contracts Finder and <https://youtu.be/bnMxVov7fdI> for the Find A Tender Service

⁴ <https://www.gov.uk/government/publications/procurement-policy-note-0521-national-procurement-policy-statement>

Steps to producing and publishing forward pipelines



Activities	Commercial Strategy Development	Pre-Procurement Phases	Planned Sourcing Route	Competition	Evaluate, Award, Feedback
Description	As per your internal governance processes, where a Business Case is required, complete as per process This may be a Procurement Gateway process or other internal governance processes	Early market engagement to test strategy (ideally 1-3 months prior to procurement start) Learning from previous procurements, category strategy, performance metrics of current contract/provider	Using learning from strategy and pre-market engagement, sourcing route to be formalised	Official competition processes commence with Invitations to Tender (ITT)	Bids are evaluated and moderated according to process. Winning bidders are informed Standstill is observed Feedback is created and distributed
Documents to use	Guidance on Barriers ⁵ to SMEs/ VCSEs	Guidance on Barriers to SMEs/ VCSEs			
Documents to produce	Forward Pipeline Template Background Template Key Needs Template Social Value Review	Update Forward Pipeline Template Update Key Needs Template Update Social Value Review	Update Forward Pipeline Template	Tender documents as required	Regulation 84 Report produced (where required) Contract added to Contracts Register Bidder feedback letters Tracking & analysis Data
Publish to:	F01 PIN to be published on Contracts Finder/ FTS - to include market engagement activity Pipeline published to: Individual anchor websites and https://www.anchors.london/	Outputs of pre-market engagement to be published on London Anchors Website Pipeline published to: Individual anchor websites and https://www.anchors.london/	Pipeline published to: Individual anchor websites and https://www.anchors.london/	ITT published to procurement portals (including Contracts Finder/ FTS) Opportunities promoted on social media (LinkedIn, Twitter)	Contract Award Notice is published Opportunity is removed from Pipeline document


⁵This refers to the guidance produced on 10 steps to removing barriers to small and VCSE organisations. Document reference TBC

What to include in the Forward Plan (Template A)

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Example - Good Practice
1	Reference Number	The unique reference number which a contracting authority will allocate to any commercial activity noted on the pipeline.		Required	Required	Required	DEFGH
2	Business Area	The business area/organisation owner for this contract.		Required	Required	Required	Responsible Procurement
3	Contract Title	The planned or published commercial activity name.		Required	Required	Required	Non Clinical Temporary and Fixed Term Staff (NB: this may be subject to change)
4	Short Description	A short contextual entry on the commercial activity. This must include what is being procured and reference the overarching programme the procurement forms part of, when relevant.		Required	Required	Required	A range of temporary and fixed-term roles from admin. and clerical to catering and maintenance for Health and wider public sector.
5	Commercial Strategy (anticipated)	The planned commercial approach for the commercial activity. Potential options include: 1. New requirement, 2. Re-procurement (same scope), 3. Re-procurement (different scope), 4. Extension (in contract), 5. Contract amendment.		Required	Required	Required	Re-procurement (different scope) A new lot (Lot 7) has been added for Managed Service Provision >£2.5m
6	Existing Contract End Date	The date on which the existing contract is due to end, i.e. the first date that the contract needs replacing by. (If this is a new requirement, please leave it blank.) Dates should be expressed as MM/YY		Required	Required	Required	July 2023

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Example - Good Practice
7	Estimated Procurement Start Date	The planned date of official commencement of the procurement e.g. release of tender or commencement of a further competition under a framework agreement. Dates should be expressed as MM/YY	Required, though dates may be MM / YY	Required	Required	Required	October 2022
8	Estimated Contract Commencement Date*	The planned start date on which the contract becomes effective. Dates should be expressed as MM/YY	Required, though dates may be MM / YY	Required	Required	Required	July 2023
9a	Estimated Contract Length	The estimated duration (in months) of the contract, excluding options to extend.		Required	Required	Required (but may be subject to change)	48 months
9b	Estimated Extension Option - Length	The estimated total length of extensions options (if applicable).		Required	Required		n/a
10a	Estimated Contract Value	The estimated total value of the new contract excluding options to extend.	Required, this may be expressed as a single value or as a band	Required	Required	Required	£2.3bn
10b	Estimated Extension Option - Value	The estimated value of the extension options, if applicable. (If not applicable, please leave it blank.)		Required	Required (but may be subject to change)		n/a
11	Planned Procurement Sourcing Route	The planned/expected procurement vehicle being used to source the contract, such as Open procedure, purchase from Framework Agreement or Dynamic Purchasing Systems (see Supplementary Definitions).		Required	Required (but may be subject to change)		Framework Agreement
12a	Contract, Framework/DPS ID	The ID of the framework that the contracting authority plans to use to procure the contract. e.g framework ID under the Crown Commercial Services. This also includes frameworks by any other providers.		Required	Required		DEFGH

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Example - Good Practice
12b	Contract, Framework/DPS Name	Where applicable, the name of the Framework Agreement through which the contracting authority plans to procure the contract. (If not applicable, please enter N/A.)		Required			Non Clinical Temporary and Fixed Term Staff (NB: this may be subject to change)
12c	Contract, Framework/DPS Lot	If the contracting authority is proposing to use a lot, the name as it appears on the framework providers website.		Required			Lot 1 - Admin & Secretarial Roles Lot 2 - Finance, Accounts and Audit Roles Lot 3 - Managed Service Providers >£2.5m
13a	Spend Category (CPV)	The procurement classification which is attributed to the commercial activity, in Common Procurement Vocabulary (CPV) format. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32008R0213&from=EN		Required	Required	Required	79000000-4 Business services, law, marketing, consulting, recruitment, printing and security
14a	Existing Contract	The name of the existing contract(s) where the commercial activity is intended to replace an existing contract, if applicable. (If this is a new requirement, please enter N/A.)		Required	Required	Required	Non Clinical Temporary & Fixed Term Staff
14b	Existing Contract Reference Number	The unique reference number which the contracting authority has allocated to the existing contract, if applicable. (If this is a new requirement, please leave it blank.)		Required	Required		ABCDE
15	Main Contact	The name and contact details of the single point of contact (SPOC). This is normally the commercial lead of the activity.		Required	Required	Required	Gillian Askew gill@go4growth.co.uk 07718 255817

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Example - Good Practice
16	Supporting Comments	Additional Comments that Contracting Authorities want to share.		Required	Required	Required	<p>Pre-market engagement activity is due to commence April/May 2022 for both customers and suppliers</p> <p>These will be advertised on via the Prior Information Notice (PIN, due March 2022) on Find A Tender Service https://www.gov.uk/find-tender</p> <p>We invite suppliers to express interest in the opportunity via the PIN</p>
17	Suitability Assessment	Is the opportunity suitable for SMEs (Small to Medium Enterprises) and/or VCSEs (Voluntary, Community and Social Enterprises)?	If no, a justification must be provided	Required	Required	Required	<input type="checkbox"/> Micro Business <input type="checkbox"/> Small to Medium Enterprise <input type="checkbox"/> Voluntary, Community or Social Enterprise <input type="checkbox"/> Large/Enterprise <input checked="" type="checkbox"/> All
18	Background and Key Needs Document	<p>Helpful Information on the Contracting Authority, such as spend per year, scope and links to any helpful information (such as strategy, procurement portal etc.).</p> <p>High level basic requirements (as per template) to illustrate what providers would need (such as licenses, accreditations, insurance, turnover threshold etc.).</p>		Required	Background only or both if known	Background only	See attached Background & Key Needs Documents
19	Social Value Model	Which elements of the Social Value Model are being considered during this procurement to create social value and report on social impact.	If not included, justification must be provided	Required	Required		 Click Here

What to do if situations change

Procurement plans are by their very nature, fluid. Budgets can change, requirements and needs can also change and as we have learned over the last few years with climate emergency and the global pandemic, we may need to operate in an emergency situation.

Below are some suggested actions to take in relation to the Forward Plan in those situations.

No.	Event	Suggested Action
1	Unforeseen event such as emergency situation (extreme acts of weather, terror, pandemic or catastrophe)	DO: Follow emergency procurement legislation https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/958211/PPN-01_21-Procurement-in-an-Emergency.pdf DO: Communicate to the market wherever possible
2	Material changes to planned procurements occur (whether this is driven by market feedback or not)	DO: Update the pipeline as normal to reflect the changes DO: re-publish as per regular timescales (eg monthly) DON'T: issue separate communications
3	Budget is withdrawn and so the procurement is no longer viable	DO: Update the pipeline as normal to reflect the changes DO: re-publish as per regular timescales (eg monthly) DON'T: issue separate communications
4	Additional funding is available on short timescales	DO: Subject to time availability, update the pipeline as normal to reflect the changes DO: re-publish as per regular timescales (eg monthly). DO: Issue a dedicated communication (via portal, website and social media) that you are running a competition

Background and Key Needs Templates

The aim of this template is to help providers qualify opportunities in a simple and effective way.

Background Information (can be produced once and updated when there are any significant changes.)

Example of what to include shown below:

Contracting Authority Name:	Guy's and St Thomas' NHS Foundation Trust	
Contracting Authority Overview	Links to Strategy Document	Links to Procurement Support
<p>We are among the UK's busiest and most successful foundation trusts, with a long history of high quality care, clinical excellence, research and innovation.</p> <p>Our Trust is made up of 5 of the UK's best known hospitals – Guy's, St Thomas', Evelina London Children's Hospital and Royal Brompton and Harefield Hospitals.</p> <p>We are part of King's Health Partners, one of only eight academic health sciences centres in England.</p> <p>We provide a full range of hospital and community services for our local communities in Lambeth and Southwark.</p> <p>Royal Brompton and Harefield hospitals provide specialist heart and lung services across the country.</p> <p>We also provide specialist services for patients from further afield, including cancer, cardio-vascular, women's and children's services, kidney care and orthopaedics. See our services section for more information. We have one of the busiest emergency department (A&E) in London.</p> <p>The sourcing team manages over £300m of expenditure across clinical and non-clinical spend categories. The supply chain team operates one of the largest automated inventory management systems in Europe. It handles over one million product deliveries per year by teams working during the day and through the night.</p>	<p>https://www.guysandstthomas.nhs.uk/about-us/our-strategy.aspx</p>	<p>https://www.guysandstthomas.nhs.uk/our-services/non-clinical-services/procurement/overview.aspx</p>

Key Needs Information

(Should be completed wherever possible and in all cases for pipeline opportunities <12 months ahead)

Contracting Authority Name:								
Contract, Framework/ DPS ID	Accreditation Required	Public Liability Insurance	Employer Liability Insurance	Professional Indemnity Insurance	Licenses Required	Financial Assessment Thresholds Used	How many providers are anticipated? (Maximum)	Other
LFB12345	SSIP or Construction Line (Bronze Level) Cyber Essentials+	£10,000,000	£5,000,000	£2,000,000	N/A	2 x Turnover Credit Checks	No limit	Contractors All Risk Insurance



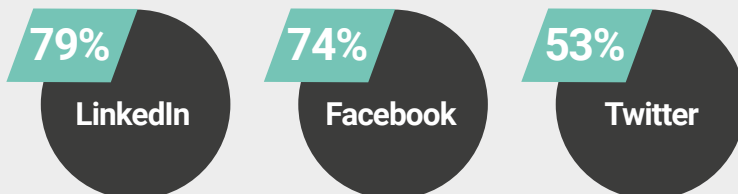
How and where to publish pipelines

DO

Make sure the pipeline is searchable and sortable for providers (such as by category, value, type etc).

Make sure the pipeline has been promoted on social and media channels such as individual websites, LinkedIn, Twitter and Facebook

Of 145 businesses polled, they voted to see pipelines and competitions being advertised on the following:



This is based on social media channels they routinely use for business

Put similar category/sector opportunities together to make it easier for providers to find all relevant opportunities at the same time

Update the pipeline when needed and re-publish at a pre-defined regular point (suggest a monthly update)

Be clear in your communication to the market about how often the pipeline is updated and re-published and ensure this is adhered to

DON'T

Publish in a format that is difficult to use on different devices

Have too many external links, as providers shouldn't have to move around to different places to get all the information needed

Disseminating the information to suppliers & analysing success

Activity	How	Checklist
Pipeline	<p>Produce tutorial videos of how to navigate the pipeline</p> <p>Social Media updates regularly to signpost providers to the pipeline</p> <p>Clear inclusion on London Anchors website and links from individual Anchor Institutions' websites to London Anchors website</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Guidance produced <hr/> <input type="checkbox"/> Signposting to guidance <hr/> <input type="checkbox"/> Posts on LinkedIn (monthly) <hr/> <input type="checkbox"/> Twitter posts (monthly) <hr/> <input type="checkbox"/> London Anchors website updated <hr/> <input type="checkbox"/> Links from individual Anchor websites to London Anchors' website
Pre-Market Engagement	<p>Advertise pre-market engagement events or intelligence gather via the portal AND via trade press and social media</p> <p>Wherever possible, pre-market engagement activities should be done collaboratively across the network to maximise attendance, maintain consistency in approach and communication, drive efficiencies and optimise networking building opportunities</p> <p>Track number of attendees, capture basic demographic information such as size and location of attendee</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Portal notification of event/survey etc. <hr/> <input type="checkbox"/> LinkedIn published <hr/> <input type="checkbox"/> Twitter published <hr/> <input type="checkbox"/> Trade press/media aware <hr/> <input type="checkbox"/> Process for demographic capture and tracking in place
Process Analysis	<p>How many Expressions of Interest (EOI) were submitted (versus attendees to any pre-market engagement events)?</p> <p>How many of the Expressions of Interest became bids?</p> <p>How many EOI/Bids were from SMEs/VCSEs?</p> <p>How many SMEs/VCSEs won contracts (versus the last iteration of this contract if applicable)?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> EOI data from portal <hr/> <input type="checkbox"/> Bid data <hr/> <input type="checkbox"/> Demographic analysis of bidders and winners/losers <hr/> <input type="checkbox"/> Analysis of outcomes versus other stages of the process
Feedback	<p>Detailed feedback should be given where possible so providers can use it for learning and improvement</p> <p>Examples can be found at Annex B</p> <p>Where can losing providers go to get more support/help?</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Written feedback given <hr/> <input type="checkbox"/> Signposting to more support/help



Social Value

The National Policy Statement states that:



All contracting authorities should consider the following national priority outcomes alongside any additional local priorities in their procurement activities:

creating new businesses, new jobs and new skills;

tackling climate change and reducing waste, and

improving supplier diversity, innovation and resilience⁶



PPN 06/20⁷ lays out guidance (via the Social Value Model) for embedding social value in contracts

London Anchor Institutions have recently signed off an approach to **“Creating Social Value and Capturing Social Impact”**, the guide for which can be found [here](#) and at Annex A

⁶ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/990289/National_Procurement_Policy_Statement.pdf

⁷ <https://www.gov.uk/government/publications/procurement-policy-note-0620-taking-account-of-social-value-in-the-award-of-central-government-contracts>

Theme 1

Covid-19 Recovery

Help local communities to manage and recover from the impact of COVID-19

Theme 2

Tackling Economic Inequality

- Create new businesses, new jobs and new skills
- Increase supply chain resilience and capacity

Theme 3

Fighting Climate Change

Effective stewardship of the environment

Theme 4

Equal Opportunity

- Reduce the disability employment gap
- Tackle workforce inequality

Theme 5

Wellbeing

- Improve health and wellbeing
- Improve community cohesion



Key Points Summary

- 1** Publish commercial pipelines so suppliers understand likely future demand for services across government
- 2** Assess the health and capability of the market you will be dealing with and consider how your commercial strategy and procurement sourcing route can be adapted to address your market aims/ambitions
- 3** Consult widely and encourage broad participation with small local, diverse and micro businesses as well as with SMEs and VCSEs
- 4** Engage early with the market and consider how you will utilise market feedback to improve market takeup. What, if anything, needs to change?
- 5** Consider how you will drive social value through the procurement

Where can I get more help?

Using FTS Procurement Policy Note [08/20](#)

Procurement Policy Note [01/17](#): Update to Transparency Principles.

eLearning modules by LRN (add in hyperlink when available)

Go4Growth - Research & evidence based support for marketplace development - www.go4growth.co.uk

MSDUK - Minority supplier development - <https://www.msduk.org.uk/>

What to include in the Forward Plan (Template A)

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Details
1	Reference Number	The unique reference number which a contracting authority will allocate to any commercial activity noted on the pipeline.		Required	Required	Required	
2	Business Area	The business area/organisation owner for this contract.		Required	Required	Required	
3	Contract Title	The planned or published commercial activity name.		Required	Required	Required	
4	Short Description	A short contextual entry on the commercial activity. This must include what is being procured and reference the overarching programme the procurement forms part of, when relevant.		Required	Required	Required	
5	Commercial Strategy (anticipated)	The planned commercial approach for the commercial activity. Potential options include: 1. New requirement, 2. Re-procurement (same scope), 3. Re-procurement (different scope), 4. Extension (in contract), 5. Contract amendment.		Required	Required	Required	
6	Existing Contract End Date	The date on which the existing contract is due to end, i.e. the first date that the contract needs replacing by. (If this is a new requirement, please leave it blank.) Dates should be expressed as MM/YY		Required	Required	Required	

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Details
7	Estimated Procurement Start Date	The planned date of official commencement of the procurement e.g. release of tender or commencement of a further competition under a framework agreement. Dates should be expressed as MM/YY		Required	Required	Required	
8	Estimated Contract Commencement Date*	The planned start date on which the contract becomes effective. Dates should be expressed as MM/YY		Required	Required	Required	
9a	Estimated Contract Length	The estimated duration (in months) of the contract, excluding options to extend.		Required	Required	Required (but may be subject to change)	
9b	Estimated Extension Option - Length	The estimated total length of extensions options (if applicable).		Required	Required		
10a	Estimated Contract Value	The estimated total value of the new contract excluding options to extend.		Required	Required	Required	
10b	Estimated Extension Option - Value	The estimated value of the extension options, if applicable. (If not applicable, please leave it blank.)		Required	Required (but may be subject to change)		
11	Planned Procurement Sourcing Route	The planned/expected procurement vehicle being used to source the contract, such as Open procedure, purchase from Framework Agreement or Dynamic Purchasing Systems (see Supplementary Definitions).		Required	Required (but may be subject to change)		

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Details
12a	Contract, Framework/DPS ID	The ID of the framework that the contracting authority plans to use to procure the contract. e.g framework ID under the Crown Commercial Services. This also includes frameworks by any other providers.		Required	Required		
12b	Contract, Framework/DPS Name	Where applicable, the name of the Framework Agreement through which the contracting authority plans to procure the contract. (If not applicable, please enter N/A.)		Required			
12c	Contract, Framework/DPS Lot	If the contracting authority is proposing to use a lot, the name as it appears on the framework providers website.		Required			
13a	Spend Category (CPV)	The procurement classification which is attributed to the commercial activity, in Common Procurement Vocabulary (CPV) format. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32008R0213&from=EN		Required	Required	Required	
14a	Existing Contract	The name of the existing contract(s) where the commercial activity is intended to replace an existing contract, if applicable. (If this is a new requirement, please enter N/A.)		Required	Required	Required	
14b	Existing Contract Reference Number	The unique reference number which the contracting authority has allocated to the existing contract, if applicable. (If this is a new requirement, please leave it blank.)		Required	Required		

No.	Field	Definition	Notes	Up to 12 months	12-24 Months	24 Months+	Details
15	Main Contact	The name and contact details of the single point of contact (SPOC). This is normally the commercial lead of the activity.		Required	Required	Required	
16	Supporting Comments	Additional Comments that Contracting Authorities want to share.		Required	Required	Required	
17	Suitability Assessment	Is the opportunity suitable for SMEs (Small to Medium Enterprises) and/or VCSEs (Voluntary, Community and Social Enterprises)?		Required	Required	Required	
18	Background and Key Needs Document	<p>Helpful Information on the Contracting Authority, such as spend per year, scope and links to any helpful information (such as strategy, procurement portal etc.).</p> <p>High level basic requirements (as per template) to illustrate what providers would need (such as licenses, accreditations, insurance, turnover threshold etc.).</p>		Required	Background only or both if known	Background only	
19	Social Value Model	Which elements of the Social Value Model are being considered during this procurement to create social value and report on social impact.		Required	Required		

Background Information (Template B)

This document can be produced once and only updated with any significant changes. It should accompany the pipeline when published.

Contracting Authority Name: <input type="text"/>		
Contracting Authority Overview	Links to Strategy Document	Links to Procurement Support

Key Needs Information (Template C)

(Should be completed wherever possible and in all cases for pipeline opportunities <12 months ahead)

Contracting Authority Name:								
Contract, Framework/ DPS ID	Accreditation Required	Public Liability Insurance	Employer Liability Insurance	Professional Indemnity Insurance	Licenses Required	Financial Assessment Thresholds Used	How many providers are anticipated? (Maximum)	Other



Creating Social Value and Reporting Social Impact

Bloomberg Associates

https://docs.google.com/presentation/d/1AP8_VjKBJGBD8Im4AIM2Ki0VrdLEOwRt68I7r163z-E/edit

Example of good feedback

Annex B

Scoring Evaluation

Each proposal was assessed against the criteria outlined on the evaluation criteria below and scores were generated from feedback provided by an assessment panel.

Winner 63.75% 1

Bidder A 61.25% 2

Evaluation criteria	Total mark	Your Score	Score of successful tenderer	Reason for the decision and the characteristics and relative advantages of the successful tenderer(s)
Relevant experience of delivering similar business support	4	3	2	The bidder achieved a higher/same score. No further feedback required
Knowledge - Ability & experience to recruit diverse businesses for this specific programme	4	3	2	The bidder achieved a higher /same score. No further feedback required
Project plan & Project resource allocation - Delivery: provide proposal and delivery plan and team allocation to achieve deliverable and KPIs	4	2	3	Successful Tenderer The successful tenderer demonstrated a good insight of the tender requirements of the ITQ and the project plan reflected an understanding and ability to deliver outcomes via their methodology including recruitment, needs assessment, technical sessions, KPI's and monitoring. Extensive experience meeting KPIs for local government business support programmes similar to these requirements. The successful tenderer had good experience of engaging sectors beyond professional services.

				<p>Bidder A Feedback</p> <p>The focus for Go4growth’s proposal presented areas that was out of scope of the requirement - but we may want great focus on supporting businesses over information on barriers. The successful tenderer demonstrated greater sector engagement.</p>
Budgeting –	4	2	3	<p>Successful Tenderer</p> <p>The successful tenderer provided satisfactory budgetary requirements and gives a breakdown or costs to reflect the plan and resource allocation as well as risk and mitigation plan.</p>
Budget breakdown & pricing				<p>Bidder A Feedback</p> <p>The bidder met the budgeting requirements and provided a high-level breakdown of costs from an activity- based viewpoint. However, there was no specific detail of resource allocation and lacked detail on budgetary requirements and gives a breakdown or costs to reflect the plan and resource allocation as well as risk and mitigation plan.</p>

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<https://www.youtube.com/channel/UCrxyN1Vx2169p2KzsoP2XMA/videos>