U START SUPPLIER BRIEF: START-UP ADVISOR

1. Requirements Overview

Lancaster University Enterprise Team seeks to procure a regular Start-up Advisor to contribute on a part-time weekly basis to the delivery of the ERDF-funded U Start project through direct interactions with project beneficiaries; both individuals in the pre-start stage, and representatives of new and established businesses. As per the context, the beneficiaries are primarily students and recent graduates, but also include alumni, staff and local business owners.

The immediate requirement is for the period until end March 2022, in line with the project duration, with potential for extension to end June 2023. Due to the seasonal nature of student engagement throughout the academic year, the number of appointment slots required will vary, but we anticipate a requirement to undertake **three to six meetings per week**, depending on customer demand and supplier availability. The meetings, as well as the associated record maintenance, are likely to take between 45 and 90 minutes each.

Please note that, in line with the University’s response to COVID-19, all delivery is currently being undertaken remotely via Microsoft Teams or similar; however, a return to in-person delivery on campus is anticipated from the beginning of the new academic year commencing 1st October 2021. Remote engagement will remain an option for beneficiaries to ensure ongoing accessibility of the support available.

**Applications are sought from suitable suppliers no later than Sunday 23rd May, 2021.**

2. Responsibilities

The primary responsibilities are:

**Baseline Diagnostics & Action Planning**

- Conducting initial 1-2-1 diagnostic meetings to determine goals, baseline capabilities and associated development needs.
- Providing practical information about start-up/business innovation formalities and processes; sign-posting useful contacts, networks and resources; offering constructive and appropriate responses to issues raised.
- Agreeing time-bound action plans aligned with priority needs and beneficiary availability, as well as setting dates for subsequent progress review meetings.
- Ensuring client records updated following each intervention to reflect content of discussion, and to ensure other team stakeholders can undertake effective project reporting and identify additional opportunities for support aligned with defined needs.

**Ongoing Progress Management**

- Conducting periodic check-in meetings to discuss progress since last meeting, reflecting on insights gained and impact on previous plans and priorities; to identify evolving development needs and ensure awareness of other relevant support and resources; to agree new action plans and subsequent check-in points.
- Responding to occasional ad hoc queries in between agreed meetings.
- Continuing to ensure client records reflect most up to date information.

Baselining and Progress meetings are held on a weekly basis, with appointments arranged by the Enterprise Team within previously agreed slots, according to the availability of the supplier.
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Workshop Input

Acting as an occasional source of input for other members of the U Start project team responsible for group interventions (e.g. workshops and masterclasses, networking and sharing events, etc) where the intended development outcomes align with the knowledge and experience of the Start-up Advisor. This may involve:

- Contributing to team-based intervention planning processes.
- Contributing to delivery or content of group interventions.

This is a more ad hoc requirement but is included within scope of this brief to be drawn on should the need arise, in prior mutual agreement with the supplier.

3. About U Start

U Start is a project part-funded by the European Regional Development Fund (ERDF) and delivered by Lancaster University and UCLan. The project contributes to regional economic regeneration priorities in Lancashire, by developing the entrepreneurial capabilities of students and graduates looking to start new businesses in the area, and supporting new and existing local businesses to launch new products or services to minimise risk of business failure and enhance potential for growth.

The project is currently scheduled to end in March 2022; however, a proposal to extend the project activity until June 2023 is currently under consideration by the funder.

Activities

U Start activities are delivered by Lancaster University Enterprise Team, operating as Work in Progress, Lancaster University’s professional service area responsible for promoting and delivering entrepreneurial learning & development opportunities, for the purposes of innovation, engagement, employability, start-up, sustainable research impact and IP commercialisation.

Principles and approaches

- **Lean by design**: U Start activities draw on the principles of Lean Entrepreneurship (Eric Reis, 2011), enabled by Human Centred Design approaches, particularly those established by Stanford University d.school.
- **Sustainability**: U Start activities support models of value creation that are sustainable financially, economically and socially.
- **Diversity**: U Start activities actively harness the value of diversity; as present within the beneficiary community and its collective experience, and the delivery team and range of suppliers used.
- **Authenticity**: U Start activities actively enable interactions with and learning from other entrepreneurs; both members of the beneficiary community and more established business leaders.
- **Learning through doing**: U Start activities develop reflective learning capabilities, as a result of taking entrepreneurial action and ‘failing forward’.

Outputs

The project’s success is determined by its attainment of quarterly output targets, defined by the UK’s Ministry for Housing, Communities & Local Government (MHCLG), namely:
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- The number of individuals receiving 12 hours of pre-start support.
- The number of businesses receiving 12 hours of post-start support, predominantly within 12 months of business registration.
- The number of new jobs created as a result of the post-start support.
- The number of products or services entering the market as a result of the post-start support.

The supplier will contribute to the success of the project by enhancing the delivery capacity and capabilities of the U Start project team to engage and support new and existing beneficiaries in the activities that contribute towards these targets.

4. Supplier profile

The ideal supplier will be able to demonstrate:

1. Personal experience of business start-up, with sufficient recency to have a first-hand appreciation of the economic environment and contemporary entrepreneurial practices that current start-up founders need to navigate to be successful.

2. Personal experience of supporting both aspiring and established start-up founders, applying the same or equivalent principles and approaches that underpin the U Start project (see above), as well as tools such as the Business Model Canvas (Osterwalder & Pigneur, 2010), for the purposes of diagnostics, planning and competitor analysis.

3. Personal experience of supporting students and other individuals in a higher education context, through both 1-2-1 and group-based learning interventions, in order to have clear appreciation of the various practical and intangible constraints that currently influence their engagement and effectiveness.

4. Practical ability to fulfil the responsibilities outlined in section 2, both remotely and in person as required, within the cost constraints associated with travel expenses (see section 7 below).

5. Supplier commitments

The successful supplier will commit to:

- Liaising with the Enterprise Team prior to each intervention to confirm any client-specific considerations or requirements, e.g. visa status constraints or additional project paperwork, etc. The project team will ensure the supplier has sufficient knowledge of essential constraints and evidence requirements to minimise the time involved in this.

- Ensuring attendees “sign-in” to every intervention, ensuring this evidence is provided to the project team immediately after the event. The project team will provide clear guidance on how to do this for online and in-person interventions.

- Ensuring ongoing familiarity with the termly U Start support offer in order to maximise beneficiary participation. The project team will ensure the supplier has sufficient product knowledge for this.

- Ensuring client records are updated to reflect key discussion points, latest identified needs and agreed actions, etc, promptly following each session. The project team will provide access to the mechanism for updating these.
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- Being prepared to provide additional information and insights about clients with other U Start team members periodically, by phone or email or in person, for the purposes of clarification and gaining professional perspectives.

- Ensuring that any materials made visible to beneficiaries during any intervention, e.g. presentation slides, handouts, canvases, etc, comply with branding requirements of the funder (European Regional Development Fund/Northern Powerhouse) and delivery partner (Lancaster University/Work in Progress). Support will be provided by the U Start team to ensure compliance.

- Recognising that all materials produced for engagement with U Start beneficiaries within scope of this agreement will remain the property of the U Start project.

- Acting as a positive and constructive representative of the U Start project, the Work in Progress team and Lancaster University in all interactions with beneficiaries, suppliers, and other members of the public.

6. Selection process

Applications

Applicants should submit a full application, including:

- A statement, max 2 sides A4, describing how they fit with dimensions 1-3 of the supplier profile outlined in section 4.
- A single hourly rate for performing all dimensions of the role outlined in section 2, along with confirmation of VAT status and commitment to the travel expenses constraints outlined in section 7, to enable a clear projection of potential total costs and assessment of value for money to be ascertained.

Applications should be sent to n.swaffield@lancaster.ac.uk no later than Sunday 23rd May, 2021.

Shortlisting

Once all applications have been received, a shortlist of three final applicants will be selected in order to comply with our procurement regulations for contracts with a value of £2,500-£24,999. These shortlisted applicants will then be invited to an informal online interview at a mutually convenient time.

Interviews

The three shortlisted applicants will be invited to meet members of the U Start team, and to be observed interacting with existing U Start beneficiaries. This will allow the team to make a more informed decision about the most suitable applicant.

Criteria

The final decision will be based on the following factors:

- The perceived fit of the potential supplier as described in their statement, against the three dimensions of the profile described in section 4, based on the team’s experience of its needs and those of its customers.
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- The observed fit of the potential supplier in relation to the team’s principles, values and approach based on their performance at interview.
- The supplier’s value for money relative to other bidders based on the proposed hourly rate. While price is a factor, it does not follow that the cheapest hourly rate proposed will automatically be successful.

**Scoring**

Each factor and sub-dimension will be scored using a range of 0-4, where:

- 0 = insufficient response to allow meaningful assessment
- 1 = a weak response that does not provide reassurance of quality or competence to fulfil the requirement
- 2 = an adequate response
- 3 = a good response
- 4 = a strong response, clearly providing reassurance of quality or competence over and above the basic requirements

The maximum potential score is 5 x 4 = 20. The supplier with the highest total score will be offered the opportunity. This may involve negotiation around the price where this is identified as beyond the available budget.

**7. Terms of agreement**

**Payment**

Once a supplier has been selected, a Purchase Order will be raised with the value of the agreed fee. A schedule for invoicing will be agreed with the supplier, based on the anticipated schedule of work. The supplier may submit invoices, citing this PO number, in accordance with this agreed schedule. Standard payment terms will apply.

**Duration of agreement and review**

The agreed rate must remain fixed for the first six months of the agreement but may be reviewed at that point. Should an increase in price be required after this initial period, a request to do so must be submitted in writing to the University along with a full revised schedule. Price increases must be agreed with the University and must be in line with the Consumer Price Index (CPI).

Towards the end of the contracted period, the agreement may be reviewed and extended for a further period, not exceeding the total duration of the U Start project, depending on positive feedback from customers and team members.

The University reserves the right to cancel the agreement with the supplier for poor performance, based on negative feedback from customers or team members. If poor performance is reported, a review meeting will be held with the supplier and actions will be agreed to address the identified issue(s). Should the issue(s) remain unresolved, the University will confirm termination of the contract and arrange for payment of any work undertaken.
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Travel expenses

Where the supplier travels by car to fulfil the agreed responsibilities, fuel costs are reimbursable at a rate of 45p per mile. The distance should be calculated using a common mapping tool, e.g. Google Maps, in order that the distance can easily be validated by our auditors. Parking costs are reimbursable upon provision of original receipts.

Where the supplier travels by public transport, travel costs are reimbursable upon provision of original receipts.

In order to support the University’s sustainability goals, reimbursement of travel costs of all types is capped at £50 per round trip. Furthermore, the supplier is expected to carefully plan logistics around beneficiary meetings to minimise the number of trips required.

Travel costs should be fully detailed and claimed within the same invoice as the activity with which they are associated.

No other costs, e.g. food and drink, accommodation, broadband and other telecommunications, are reimbursable without prior agreement with the U Start Project Manager.

8. IR35

Bidders shall note that any supplier in scope of the IR35 legislation shall be paid via Payroll, with PAYE tax deducted from their invoice. In addition, the University will pay Employer’s NI contributions and Apprenticeship Levy. Once the successful bidders have been appointed, the details will be put through HMRC’s tool to determine whether or not the successful supplier is in scope.

More information on this legislation can be found at: https://www.gov.uk/guidance/off-payroll-working-in-the-public-sector-reform-of-intermediaries-legislation

It is recommended that bidders use the tool or speak to an accountant to determine whether or not they are in scope of IR35 legislation.

9. Further information

If you have any queries about this process or the information contained in the brief, please contact us directly on the email address given above.