

One to One Advice Service

Supplier Terms & Conditions

SCHEDULE 1 PAYMENT TERMS

1 PAYMENT

Subject to the other terms hereof BLE shall pay:

- (i) £100 (**inclusive of VAT**) per **Business Counselling Session Voucher** (for individuals who have **not yet started their business** (Pre-Start))
- (ii) £100 (**inclusive of VAT**) per **Business Support Session Voucher** (for individuals who have **not yet started** their business **and may** have benefited from a Business Counselling Session **or** for Businesses that have been trading for up to 3 years)
- (iii) £500 per **Thurrock Business Support Voucher or Harlow Business Growth Voucher or High Growth Support Voucher - to be VAT inclusive where invoiced to Business Link** (see below)
- (iv) £1000 per **South Cambridgeshire Business Support Voucher - to be VAT inclusive where invoiced to Business Link** (see below)

For vouchers (i) and (ii) above invoices (with the original of the advice form) should be sent to Business Link for payment, please note that if you charge VAT then because the monies for the vouchers are effectively Government Grants, Business Link is not able to claim back any VAT. Therefore, your invoice can only relate to the gross face value of the vouchers and the amount to be used prior to adding the tax is therefore £85.11 (+ vat £14.89).

The Client and the Supplier acknowledges that the Vouchers (i) and (ii) above are to be redeemed in accordance with the terms and conditions regulating the Agreement between the parties. The sum payable is the amount written on the face of the voucher and is VAT inclusive as mentioned above. It is the responsibility of the Client and the Supplier if VAT-registered, to account for VAT on their own accord. The Vouchers are, and will remain at all times, the property of Business Link East and may only be redeemed under the Scheme.

For vouchers (iii and iv) if **both** you and the client are VAT registered then you should invoice the client direct for the value of the work done. This will allow them to reclaim any VAT payable, which as mentioned above we are not able to do. We will pay the value of the voucher direct to them. Amounts to be claimed where BLE is invoiced for iii is £425.53 plus vat of £74.47 and for iv is £851.06 plus vat of £148.94.

In cases where you invoice the client then it is the client's responsibility to settle the invoice issued by you and Business Link cannot be held responsible for any invoices that remain unpaid.

In all other cases invoices should be sent to Business Link in the usual way as mentioned above for i and ii.

Please note that for ALL types of vouchers you are required to submit the Advice and Action Point Record form to Business Link direct as soon as possible following the meeting (see Appendix 1)

2 SUBMISSION OF CLAIMS

2.1 The Supplier shall submit claims where work has been undertaken on a regular basis and at least once per month for One to One advice given to Business Link clients. The claim will be submitted by means of an invoice to Business Link East* and sent to the address in 2.1.1 together with a completed Advice and Action Point Record form that has been signed by **both** the supplier and the client and where the details have also been completed in the "online" version of that document.

* For Thurrock Business Support Voucher, Harlow Business Growth Voucher & South Cambridgeshire Business Support Voucher – please see Appendix 1 for guidance.

2.1.1 The address for all correspondence relating to vouchers is:

Business Link East, 4 Bishops Square Business Park, Hatfield, Hertfordshire, AL10 9NE – **Please ensure that all correspondence is clearly marked for the attention of Peter Gatland**

2.2 Payment will only be made by BLE to the Supplier as explained in Appendix 1.

Please note that the requirement to fully complete the client/business details on the Advice and Action Point Record form (see Appendix 1) is mandatory.

If you fail to correctly and fully complete these details then payment may be refused. Should this be a regular occurrence then the Contract Manager – Advice from Business Link will have a discussion with you concerning this. Should the failure to complete this correctly continue then be aware that you may be removed from the list of suppliers.

SCHEDULE 2 THE SERVICES

1 THE SERVICES

PLEASE NOTE THAT THE BUSINESS COUNSELLING SESSION VOUCHER AND THE BUSINESS SUPPORT SESSION VOUCHER CAN BE REDEEMED AGAINST **ADVICE ONLY** (NO DELIVERY) ALL OTHER VOUCHERS CAN INCLUDE DELIVERY AS PART OF THE SUPPORT.

1.1 The Supplier shall provide a One to One business advice or support service in accordance with the terms of this Agreement, available to eligible individuals and businesses. The supplier also agrees to accept a voucher as provisional payment (or part payment) for the supply of the service to the client. The Vouchers will be redeemed by BLE in accordance with schedule 1 of this agreement **subject to the guidelines in Appendix 1 having been followed.**

For these purposes:
'Eligible' means

- i) Individuals and businesses ('Clients') having a place of business in the East of England region or intending to have a place of business. (East of England means Norfolk, Suffolk, Hertfordshire, Bedfordshire, Essex and Cambridgeshire)
- ii) Have permission to live and work in the UK (where required)
- iii) If the Client is using a **Business Counselling Session Voucher** the Client has **not yet started** a business.
- iv) If the Client is using a **Business Support Session Voucher** the Client has **not yet started** their business **and** may have previously benefited from a Business Counselling Session **OR** is a business that has been trading for no more than 3 years.
- v) A small to medium business (i.e. individuals in business on their own account or firms or limited companies) those normally employing between 1 and 10 people.

1.2 Subject to the other terms hereof in consideration of the payment by BLE to the Supplier in accordance with Schedule 1 of this Agreement the Supplier shall provide a One to One advice service for these clients of BLE and follow the guidelines set out in Appendix 1 regarding the process of accepting a Voucher issued by BLE for which payment will be made as specified in Schedule 1 of this agreement and which may be amended from time to time.

1.3 The supplier will deliver services as follows –

Business Counselling Session

For those suppliers who are NFEA registered or have been awarded Customer First Accreditation then they may accept Business Counselling Session Vouchers for a One to One Session. The Supplier undertakes to fully discuss the proposed business with the client and check that all appropriate preparation to start trading has been made or is planned. If as a result of questioning the client it is apparent that some things have been overlooked then these should be brought to their attention. A plan should be provided to the client detailing the steps that still

need to be taken prior to the commencement of the business and these should be appropriately prioritised.

It is possible that some additional support may be available to the client to assist with the cost of the further actions that may have been identified during the Business Counselling Session. They should therefore be directed back to Business Link for a discussion about their issue/need and consideration can then be given to the appropriate way forward which could include the issue of a Business Support Voucher.

Please advise the client to contact Business Link (08457 17 16 15) following the meeting to discuss this in the light of the recommendations you have made. Please also ensure that you complete the on line version of the advice form as soon as possible following the meeting so that we can review this, and the recommendations made, in order to aid that discussion with the client.

Business Support Session

All voucher accepted suppliers can accept the Business Support Session Vouchers, and it is the client who will decide where they are to be redeemed. The choice will be made following a search that the client will undertake on the Supplier Brokerage Service Database.

1.4 In accepting the Vouchers the Supplier agrees to advise the client at the time the appointment is booked of any possible additional cost not covered by the Voucher and which will have to be met by them.

1.5 For all Vouchers (but excluding the Business Counselling Session Voucher – please see 1.3 above regarding services to be delivered using this) the Supplier agrees to address the client's particular issue(s) or concern(s) as far as is reasonably possible.

1.6 The Supplier undertakes not to accept an appointment for a client for any voucher if it is felt at the outset that their needs could be best met by another provider. It is accepted, however, that sometimes this can only be determined as a result of an initial meeting.

2 STANDARD OF BUSINESS ADVISERS AND CONSULTANTS

2.1 All business advisers should be experienced in the diagnosis of business problems with a proven track record in delivering quality One to One advice and support and have the ability to give general business advice or specific advice in areas where they have a specialism. In the case of Businesses Counselling Session Vouchers, suppliers **must** either be a member of the National Federation of Enterprise Agencies or have been awarded a "Customer First" Accreditation.

2.2 All advisers should hold an appropriate professional qualification relating to their profession, sector or specialism or be accredited to SFEDI standards or other appropriate standards that may be determined from time to time by the East of England Development Agency (EEDA) under which BLE operates.

3 SUBCONTRACTORS

The delivery of One to One Advice Sessions shall not be subcontracted under any circumstances to any other parties without the prior written consent of BLE.

4 QUALITY MANAGEMENT SYSTEM

4.1 Upon written request, subject to a reasonable period of notice by BLE, access will be granted for BLE's independent inspection team and representatives of BLE to visit service locations, talk to employees engaged upon delivery of the service and inspect working practices and procedures in order to verify that it is being carried out to the required standards.

5 EVALUATION

5.1 It is accepted by BLE that as part of your delivery you may wish to evaluate the service to the client either at the time of the session or subsequently. Such evaluations shall remain your property but should be made available to the BLE's independent inspection team or representatives of BLE should they ask to see them as evidence of the quality system in force as mentioned in Clause 4 of this Schedule. Sight of such evaluations may also be requested where BLE is made aware of some dissatisfaction by a client in respect of the service received. (See 5.3 below)

5.2 The Supplier acknowledges that a request for feedback will be sent to every client following a Session by BLE. Additionally an independent evaluation service is employed by EEDA to monitor the BLE services and clients may be contacted at random and asked questions concerning the advice session and the standards of service received in order to monitor quality and client satisfaction.

5.3 If any issues are identified following the evaluations referred to in 5.2 above and should further clarification of comments made by a client be required then BLE may contact the Supplier to gain further information or investigate a specific case. In that event if you have obtained an evaluation at the time the service was delivered then BLE may request sight of it and this should not be unreasonably withheld.

5.4 In the event that BLE identifies there is an issue with the standard of advice given to clients, then at its discretion, and subject to the procedure specified in the core terms and conditions of the Supplier Brokerage Service, BLE reserves the right to remove a supplier from participation in the Voucher scheme. In that event BLE will pay to the supplier any sums rightfully due in respect of services performed up to the date that the specified notice takes effect.

6 CLIENT SATISFACTION TARGETS

The Supplier shall use its best endeavours to ensure that the quality of the service provided is such that the results from the EEDA Customer Satisfaction Surveys achieve at least the minimum targets for customer satisfaction levels set from time to time by EEDA. At the date hereof this requirement is for 93% of customers evaluated to confirm their satisfaction with the Service provided.

7 STORAGE OF INFORMATION

Please note that whilst recommending that you take copies of information submitted for your own records this does mean that you will retain information on Business Link Clients. Any such information must be securely stored and also when disposing of these papers at a later date then suitable means should be used to ensure it is securely disposed of i.e. shredding or confidential waste disposal.

Appendix 1

Business Link - Starting A Business Support

Supplier guidelines for using the system:

Core Voucher Types

As part of the Starting A Business Product under the government Solutions for Business criteria certain individuals are eligible to receive support which will allow them to check their readiness to start trading and also to seek other specific help to resolve issues prior to doing so. A Business Counselling Session Voucher or a Business Support Session Voucher may be provided with a unique identification number to redeem against a One to One advice session.

A Business Counselling Session Voucher (for individuals who have **not yet started** their business (Pre-Start) and who have not previously received a Voucher) **Value £100-00 (Can only be redeemed for Business Advice)**

A Business Support Session Voucher (for individuals who have **not yet started** their business **and who may** have benefited from a Business Counselling Session Voucher **or** for businesses that have traded for up to 3 years) **Value £100-00 (can only be redeemed for Business Advice)**

Other Vouchers

A High Growth Support Voucher – Value £500. This will be provided as part of the support to eligible businesses under the Starting a High Growth Business Product. This voucher provides additional support for those businesses that have the appropriate growth potential (this is defined as any business that has the potential to be turning over £500k or more within 3 years of starting trading).

South Cambridgeshire Business Support Voucher £1000 or Harlow Business Growth Voucher £500 or Thurrock Business Support Voucher £500 (Specific to businesses that are located in those local authority areas only and who have been trading between 1 and 3 years) **(Each of these vouchers can be used for advice and/or service delivery)**

Please note that other Vouchers may become available in the future but all suppliers will be advised of these in advance by Business Link. If you are unsure how to deal with a voucher or have come across a particular voucher type not mentioned above, please contact Peter Gatland on 01707 398304 in order to verify it before doing any work.

ACTIVATING VOUCHERS

To be done as soon as possible upon contact from a client – for ALL vouchers:

The supplier should arrange the advice meeting and **it is imperative that a note is made of the unique voucher number**. Any other information that the supplier may require e.g. telephone number, address etc. should also be taken at the time. If the cost for the proposed meeting is envisaged to be over and above the value of the voucher then this **must** be advised to the client at the time the appointment is booked in order that they can be aware of any cost that they will have to meet themselves.

*Once the appointment has been made the supplier **must** activate the Voucher by logging on to the Web Activation Page. **This must be done as soon as possible after the meeting has been arranged.** (Please see the manual provided separately detailing how this should be done).

IT IS IMPORTANT THAT THIS ACTION IS TAKEN AS ON OUR RECORDS IT SHOWS YOU AS THE SUPPLIER WHO WILL REDEEM THE ITEM. IF THE CLIENT GOES TO OTHER SUPPLIERS WHO ALSO DO WORK FOR THE SAME VOUCHER WE WILL ONLY PAY THE SUPPLIER WHO HAS FOLLOWED THESE INSTRUCTIONS AND ACTIVATED THE VOUCHER.

The data to be input is the Voucher number and the validation date (meeting date). Once the information is input the screen will confirm the validation of the item and the amount of the voucher. If any difficulties are encountered please email the voucher team for guidance or call Peter Gatland on 01707 398304 who will assist you.

***If for any reason it is subsequently necessary for you to cancel the arranged meeting due to difficulties beyond your control or should the client not turn up for the booked session or they make contact to re-arrange the date; then advice of the cancellation, change, or failure to arrive, must be notified to Business Link by email to the Voucher administration team at Vouchers@businesslinkeast.org.uk as soon as possible. You are unable to amend the date on the system yourself.**

COMPLETION OF THE ADVICE AND ACTION RECORD FORM

These forms must be completed for **all** Vouchers. Prior to the advice or support session, and if it is required, print off a copy of the Advice and Action Point Record form by using either the Word version supplied to you or the On Line form (which should be printed in Landscape format). This should be completed with the bullet points as mentioned below and **signed by both advisor and client at the conclusion of the meeting**. Please ensure that you are aware of the content of the dropdown fields (if not completing it on line) to make the correct selections where applicable. **Please note that the personal information for the client should ALWAYS be asked in order to ensure that our records are kept up to date, (see the warning on page 2 as this is NOT an option even if it is not something you would normally do with clients).**

When completing the above document it should include (as bullet points)

- The subject matters discussed
- Actions arising for the client – including next steps to be taken – duly prioritised where appropriate
- Actions for the Adviser including any referrals made (name of organisation or individual).

The data must be input on line as soon as possible. This is particularly important for those suppliers who will redeem the Business Counselling Session Vouchers. Where you have indicated that further support may be needed the client should be directed back to us to discuss their issue/need. It is therefore important that we can view the outcome of your meeting to aid that discussion. Please see the manual provided in respect of the link address to input this information (if required).

Please note that the electronic version of the Advice Form must be completed on line and the original document (signed by both parties) is to be received by Business Link. If this does not happen then payment may be refused.

OBTAINING PAYMENT (Business Counselling Session and Business Support Session Vouchers) – For payment of other voucher types see below.

Prior to despatch of the invoice the supplier should send an email to Vouchers@businesslinkeast.org.uk in order to obtain a purchase order number to quote on the invoice. A number of vouchers can be claimed at the same time on the same invoice in order to cut down on administration time. The email should, advise the voucher number(s) and the surname(s) of the clients (not business name as vouchers are issued in the names of individuals) for which a claim is being made and the overall totals to be claimed, indicating whether or not you charge V.A.T.

Once you have received a response email from BLE with the purchase order number your invoice should be completed showing it and sent with the **Original** Advice and Action Point Record forms to the following address:

**For the Attention of Peter Gatland
Business Link Voucher Administration Team
Business Link East
4 Bishops Square Business Park
Hatfield
Herts
AL10 9NE**

OBTAINING PAYMENT (For South Cambridgeshire Business Support Vouchers, Harlow Business Growth Vouchers or High Growth Support Vouchers)

If you do not charge VAT then please submit all documents to Business Link for payment in the normal way (same as Business Counselling Session and Business Support Session Vouchers above).

However, if you and the client are **both** VAT registered then the Advice and Action Point Record Form should be completed as normal and sent to Business Link at the above address as soon as possible following the meeting. In order to obtain payment an invoice should be sent direct to the client for whom the work was undertaken as soon as possible following completion of the work carried out. The client will submit a copy of your invoice to Business Link and will also provide their bank details in order to claim the grant funding in full. It is therefore important that the Advice Form is sent to Business Link as soon as possible as otherwise it will delay the payment being made to the client. This could ultimately delay payment to you.

Please note that Business Link cannot accept responsibility for any invoices sent direct to clients that are not paid.

The supplier should take any copies of documents required to complete their own records before despatch in the usual way **as we do require the original to be sent to us.**