**Invitation to Tender**

**Evaluation Support Contract**

**3 years; UK wide**

*Minimum spend £25,000 over three years; maximum £75,000*

**Background**

1. Spirit of 2012 is a funding charity, established with a £47m endowment from the Big Lottery Fund. We fund projects that help people to be creative, active and connected across the UK. We invest in work we believe will create good outcomes for people and communities. As a funder, we stay close to our projects and seek to measure outcomes across a common set of indicators. Spirit is a spend out trust, entering the fifth year of a ten-year life span.
2. Spirit is seeking a partner to work with us and our grant funded partners over the next three years to support our grantees to monitor and evaluate their work.

**Mission**

1. The Big Lottery Fund endowed Spirit of 2012 to help create sustainable social legacies, inspired by major events across the UK, especially for young people, disabled people and disadvantaged groups.
2. We fund both established expert organisations and small or newly formed ones to realise their potential to improve people’s lives.
3. Individual and social outcomes interest us more than numerical targets, inputs and outputs; this focus is designed to enhance the projects we fund for both partners and beneficiaries. We have built a dynamic learning hub among the ‘Spirit family’ of partners to help spread and embed our insights and best practice.

**Impact Statement**

1. We believe that enabling people to participate in a wide-range of inclusive activities and engaging together in their communities will:

* Improve the health and wellbeing of individuals, communities and society as a whole
* Improve perceptions (including self-perceptions) and attitudes towards disability and impairment
* Lead to greater social cohesion and understanding

**Spirit’s portfolio**

1. Spirit funds projects across three portfolios: connected, active and creative. Within these broad portfolios, each project focuses on improving social outcomes in two or more thematic areas: wellbeing (compulsory), perceptions of disability (compulsory), social connectedness, engaging volunteers, empowering young people and inspiring events.
2. Spirit has 23 live grants (at July 2017), working across the UK. We anticipate a further 5 - 10 grants being awarded in the life of this contract (to be confirmed). Not all grants will be live for the duration of this contract. A copy of the Programme Strategy can be requested to inform your proposal.

Further details about Spirit can be found at our website [www.spiritof2012trust.org.uk](http://www.spiritof2012trust.org.uk)

**Learning and Evaluation at Spirit**

1. Spirit’s Business Plan sets an ambition that we will become an authoritative source of expertise and learning in the use of events, sport and arts to improve people’s lives, the lives of disabled people in particular, and in how to engage and retain more young people in volunteering. Robust evaluation is critical to our success for two key reasons: firstly, it enables us to see whether the grant investments and partnerships we make are successfully contributing towards the delivery of our overall aims and objectives. Secondly, it enables us to build on and contribute to the growing body of evidence about ‘what works’ in our funded areas.
2. An early priority for Spirit was the development of an overarching [Theory of Change](https://www.spiritof2012trust.org.uk/our-theory-change). This has been particularly important given Spirit’s broad and diverse objectives. These were derived from the wishes and expectations of our Founder, the Big Lottery Fund, and encompass sport, the arts and culture and volunteering in communities across the UK. The Theory of Change, developed with a broad range of stakeholders and with external consultancy support, has enabled us to prioritise and articulate the impact that we seek to make, understand the preconditions and the outcomes that are required to make this change happen, and map the indicators that allow us to evaluate whether we achieved our aims. The Theory of Change is a living document which is reviewed and refined annually. Its next review is due in September 2017.
3. In order to achieve the ambitious objectives for learning set out above, Spirit requires high levels of engagement and M&E capability from its grantees, an expectation that is set out at the outset and reinforced throughout the lifecycle of a project. Spirit has provided significant levels of resource to projects in order to meet these expectations, including: structured learning events, producing guidance materials, providing up to 10% of allocated funds to be dedicated to M&E including financing external evaluations. Across our first four years of life, we have seen significant improvements in organisations’ ability to meet these demands. Nonetheless, for many organisations both monitoring outputs and impact measurement – particularly using common tools - remain challenging.
4. A challenge that we are very alive to is balancing the need to collect credible and robust qualitative and quantitative feedback from each of our grant holders, which we can use to assess the cumulative impact of our work, with our intention to be supportive in our approach and not seek to overburden projects. To mitigate this, we have prioritised the outcomes we wish to measure and have defined a series of common indicators. At the beginning of each project we jointly agree which outcomes the project is seeking to achieve, and which of the common indicators, including ONS Wellbeing indicators, that each project will report on. Our aim is that reporting can be consistent and directly comparable across the range of our programme portfolio.
5. Spirit manages the majority of grants through a quarterly monitoring cycle:

* At the grant inception, projects refine their M&E framework.
* Projects are then given 6 months to baseline participants against an agreed set of common indicators, with the opportunity for additional custom questions.
* Financial reporting occurs at quarterly intervals
* More detailed six-monthly reports require projects to reflect on ongoing learning and report on beneficiary numbers.
* Measurement against the baseline is conducted annually, and data is entered into a Social Impact Measurement (SIM) Workbook.

1. Spirit is currently in the final stage of a three-year external summative evaluation, which seeks to understand how far we are meeting our impact goals. Summative independent evaluation will continue to be important to us, and we will be looking to tender for a new, three-year evaluation in late 2017, once our current contract expires. In addition, we will also be undertaking further evaluation activity internally, including convening a group of beneficiaries to explore new, common indicators to measure perceptions of disability. Spirit also recently became an *Impact Champion* with the *Inspiring Impact* programme, and will remain part of this and other more informal networks of support. The successful bidder for this Evaluation Support Contract must be committed to working with both the internal Spirit team, and additional external evaluation partners contracted to complete formative or summative evaluation.

**The Contract**

1. The aim of this contract is to engage an evaluation partner to support Spirit’s grant-holders with their monitoring and evaluation, particularly in relation to achieving the social outcomes that they have identified.
2. There are four main aspects to this work:

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| --- | --- | --- |
| A | **Supporting new grantees to be impact-ready**  All new grantees will be asked to work with the contractor to assess their current capacity to deliver the M&E requirements of the grant. This assessment, alongside practical recommendations, would be shared with both the organisation and with Spirit. The contractor would then work with the grantee to implement those recommendations before the project began, particularly in gathering robust baseline data against which change can be assessed | Over the contract period, Spirit anticipates the following new grants:   * Connecting Communities through Cricket (Development stage: summer 2017) * Change-makers (Development stage late 2017) * Youth Advisory Panel Grants (up to 2 new grants) * Challenge Fund – up to 4 new small grants |
| B | **Support and mentor in-flight projects to overcome monitoring and evaluation challenges.**  Working with existing grantees to improve their M&E capabilities in order to better capture, understand and articulate their impact. | We would be interested to explore different approaches for providing this support. It may be that this includes a combination of the following:  1) A recommendation or requirement from Spirit that a project work with the contractor because they are struggling to meet M&E expectations.  2) The option for grantees to apply for consultancy from the contractor at key stages of their project.  3) Ongoing work identified at a project’s inception and built into the grant reporting cycle (related to Aspect A above).  4) Collective training sessions (either in person or virtually) provided on specific topics for several grantees. |
| C | **Provision of consultancy services to support Spirit staff.** This could be reviewing the ways in which grant managers currently support M&E, providing training at Away Days etc. | This element of the contract would not be guaranteed. It would be used if minimum spend was not reached and/or where specific needs were identified.  We suggest that a day and half day rate is provided for this service. |

1. The support provided must be *practical, collaborative* and *focused*:

* *Practical:* The approach should build from best practice and experience to respond to specific, real-life challenges and questions experienced by grant-holders. The contractor should marry high expectations of projects with a realistic awareness of specific grantees’ situation (including the size and proportion of the Spirit grant, and its existing M&E capacity).
* *Collaborative:* This is not an independent evaluation contract. The successful contractor will foster excellent, supportive relationships with grantees, aiming to build their understanding of M&E at key stages of their Spirit funded grant. Where written reports are provided to Spirit and grantees, it is expected that the contractor would discuss these in person with the grant-holder. The contractor should be adept at establishing open, supportive dialogue about evaluation with the grantee, whilst providing Spirit with an honest account of where they may need to improve.
* *Focused:* Although it is anticipated that the contractor will provide guidance that can be of wider benefit to the grant-holder, it should be remembered that the focus of the support should be on the Spirit funded grant, and the achievement of the outcomes set out in the M&E framework. The provision of more generalised support – for example, the construction of a theory of change – would need to be considered within that context.

1. Spirit supports a diverse range of organisations with its grant funding. Grants range in size from £50,000 to £4.5 million, and several projects have complex delivery models with devolved responsibility for delivery. As detailed above, organisations also vary both in their experience with M&E, and in the amount of resource that they are able to focus on it. Therefore, the successful contractor will have far greater interaction with some of Spirit’s funded organisations than others. If, for example, the majority of new grants were allocated to organisations with limited M&E capability, more of the fund would be allocated to Aspect A than to B and C for example. It is likely that the contractor will need to build flexibility into their proposal to take this into account.

**Finance**

1. This contract has a minimum spend of £25,000. Your application should clearly explain how you would cost various elements of the project. As a charity, we are not able to reclaim VAT therefore the total contract sum must be inclusive of VAT. Invoices can be raised monthly and will be paid within 14 days.

**Design, scope and methods**

1. We do not wish to define or constrain the approach taken in the proposals that applicants put forward. Our expectations are noted below, but we are open to proposals that meet the aims in innovative ways or build on other relevant work. All proposals should outline their rationale for their proposed approach in the application.
2. We expect the contractor to build on the experiences of the Spirit team and its current and former grantees in designing an effective support package.
3. This is a UK wide contract and the successful contractor will need to draw upon evidence from projects across the UK.

**Your skills and experience**

1. The successful contractor will demonstrate a record of supporting projects to measure and understand their impact, while keeping to time and budget.
2. The successful contractor will detail their knowledge and understanding of:

* The aims of the project
* The policy areas and issues surrounding Spirit, particularly:
* the connection between participation and wellbeing
* improving social cohesion
* changing attitudes and perceptions of disability
* Working collaboratively with – and providing training for - non-specialists to understand impact, particularly in terms of:
* Establishing processes to support high quality data collection, including robust tracking of beneficiary numbers as well as outcomes reporting
* Analysing what that data means and how it can influence the direction of a project (or future projects)
* Supporting projects to report their findings accessibly to funders and a wider audience
* Working with beneficiaries to capture the ‘human stories’ and impact of the projects, including introducing systematic approaches to qualitative data collection
* Organisational capacity and research/technical skills of the team
* Evaluation and research methods
* Ethical issues in conducting research with different groups, e.g. children and young people, people with learning difficulties.

1. Bidders will also need to demonstrate experience of:

* Providing high quality training that inspires organisations (and individuals at different levels within them) to improve their impact measurement
* Evaluating complex delivery mechanisms, programmes or concepts
* Writing analytical reports
* Analysing large and complex data sets
* Innovative approaches to impact analysis, including data collection from ‘seldom heard’ groups
* Writing up learning for publication and presentations, as well as translating and adjusting the material for a variety of audiences.

1. We are keen to receive proposals that demonstrate elements of critical thinking, a creative approach and an awareness of the issues likely to arise in supporting our grantees and evaluating their projects.
2. We expect the successful contractor to adhere to good practice and ethical guidelines.
3. We reserve the right to ask for examples of previous reports.

**Partnerships**

1. We welcome applications from partnerships, especially where these bring together particular strengths or specialist skills and expertise. One organisation should be nominated as the principle contractor and accept full responsibility for the timely delivery and quality of the work. Organisations tendering in partnership should give details of the governance arrangements between partners, and significant operational aspects such all the spread of tasks and costs among the parties.

**Management of the contract and communications**

1. The contract will be managed by the Head of Learning and Impact. The successful contractor will provide a named contact acting as Contract Manager. The contractor will maintain excellent communications with Spirit at all times ensuring that we are well informed, aware of issues and central to decision making in relation to the process. Progress meetings will be held at regular intervals in the process, as a minimum quarterly (frequency to be agreed).
2. The successful contractor must ensure that all materials, publications, events and externally focussed communications are appropriately branded using Spirit’s guidelines so that it is clear that services are commissioned by Spirit. All materials for external use (including images and video) must be presented to Spirit at a drafting stage for comment. All media (press and broadcast) enquiries relating to this piece of work during the contract and after must be relayed to Spirit’s Head of Communications who will advise on the response to be given. All political enquiries, or enquiries or communications that may carry a risk to Spirit’s reputation must be relayed to the Director of Policy and Impact and Chief Executive immediately.
3. All intellectual property arising from the work will reside with Spirit of 2012.

How to apply

1. Please complete the Response to Tender (Annex A), Schedule of Charges (Annex B) and Company Details (Annex C) in full and submit any supporting documentation in .pdf format. Please submit your response to Amy Finch (amy.finch@spiritof2012trust.org.uk) no later than 5pm on **Thursday 24th August**. Late applications will not be considered. Interviews with shortlisted organisations will take place in Central London in the week commencing w/c 3rd September 2017 (specific date and time tbc).

**Response to Tender (Annex A)**

Interested organisations are asked to submit an application detailing how they would meet each of the criteria below. Applications should be no more than 6 sides of A4, including any case studies or testimonial, and an indicative project plan. Annex B and C can be attached separately. Value for money will be assessed using both the budget and any information included in the main proposal.

|  |  |
| --- | --- |
| A | Compelling vision  The application clearly articulates why they wish to partner with Spirit and highlights their values.  There is a strong alignment between the applicant’s values, and Spirit’s own  There is an emphasis on building the capabilities of projects over the long term as well as working to ensure projects can deliver and analyse monitoring and impact data from their Spirit funded project. |
| B | Delivering results  The application demonstrates a track record of supporting organisations with Monitoring and Evaluation, clearly articulating how their support has benefited client organisations.  The emphasis should be on impact from short interventions rather than intensive consultancy.  Testimonial and/or a short case study are provided alongside further details regarding the impact of this support. |
| C | Expert practitioners  The application demonstrates an understanding of some of the key M&E challenges likely to be facing projects, including specifically around collecting data from groups who may dislike or have difficulty completing traditional surveys.  Staff assigned to the project have the requisite skills and experience to deliver on the ambitious aims of the contract. |
| D | Governance arrangements  There are clear and unambiguous management arrangements for the contract with a named, senior contract manager  The application demonstrates an understanding of the potential risks inherent in the contract  Where partnership bids are proposed, there are clear lines of responsibility, and a single, accountable contract holder to project manage all elements.  The application demonstrates a sensitive approach to the funder-grantee relationship, and how that dynamic might be effected by the provision of evaluation support. |
| E | Planning & organising  The application provides a flexible model for provision of support, with well-formed ideas about how this could be structured over the lifecycle of the contract.  An indicative project plan is provided.  The application provides excellent examples of session objectives and content. |
| F | Innovation  The application provides exciting examples of innovative approaches to collecting both quantitative and qualitative evidence, which could be replicated by teams with limited resources. |
| G | Communication (written and oral)  The application demonstrates skills at producing accessible, jargon-free evaluation materials to non-specialist organisations.  The application shows experience of providing stimulating, high quality training workshops to a diverse audience of charity professionals of varying confidence levels. |
| H | Success Criteria (double weighted)  The application demonstrates that the support will be practical, collaborative and focused (see page 4). |
| I | Value for money (double weighted) |

Each element will be scored out of 4, giving a maximum possible score of 4. Organisations which score 0 on any single element will not be considered for interview.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| 0 | 1 | 2 | 3 | 4 |
| Does not meet | References | Partially meets | Meets | Excels |

**Budget**

**(Annex B)**

1. Please provide an indicative budget for this project by completing the table below, providing day rates for the staff who would be working on this project.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Job title** | **½ Day Rate** | **Day rate** | **Indicative activities** |
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1. If there are additional costs not included in the day rates, please list them in a table.
2. For illustrative purposes, please provide two costed examples of when you have provided evaluation support services.

Company information

(Annex C)

Please complete the table below with details of your company. If you are bidding as a consortium please give the details of the lead bidder.

|  |  |
| --- | --- |
| Registered Company Details: |  |
| Company Registration Number: |  |
| VAT Registration Number (if applicable): |  |
| Main Address: |  |
| Website: |  |
| Main Telephone: |  |
| Name of Main Contact: |  |
| Email: |  |
| Telephone: |  |

Please attached two sets of audited account or equivalent as Annex D.