



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

CONTENTS

1.	PURPOSE.....	2
2.	BACKGROUND TO THE CONTRACTING AUTHORITY.....	3
3.	BACKGROUND TO REQUIREMENT / OVERVIEW OF REQUIREMENT	3
4.	DEFINITIONS AND ACRONYMS.....	6
5.	SCOPE OF REQUIREMENT	6
6.	THE REQUIREMENT	8
7.	KEY MILESTONES AND DELIVERABLES	13
8.	MANAGEMENT INFORMATION/REPORTING	15
9.	CONTINUOUS IMPROVEMENT	16
10.	SUSTAINABILITY	16
11.	QUALITY	16
12.	PRICE	17
13.	STAFF AND CUSTOMER SERVICE	19
14.	SERVICE LEVELS AND PERFORMANCE	19
15.	SECURITY AND CONFIDENTIALITY REQUIREMENTS	22
16.	PAYMENT AND INVOICING	22
17.	CONTRACT MANAGEMENT	22
18.	LOCATION	23



1. PURPOSE

- 1.1 The Department for Levelling Up, Housing, and Communities (DLUHC) (The Contracting Authority), invites tenders to provide independent monitoring and evaluation services for the Government's City Deal, Growth Deal and Devolution Deals.
- 1.2 The purpose of this Service Specification (the Specification) is to set out DLUHC's requirement for the independent evaluation of the economic impacts from locally-appraised growth interventions (referred to as Gateway Reviews). In particular, those interventions financed through Investment Funds (sometimes referred to as Gain Share or Earn Back) established as part of City, Growth and Devolution Deals, but also potentially including a wider range of linked funds and interventions, where relevant in specific places. Thirteen UK localities (from herein referred to as "**Areas**") have to date agreed devolved funds with Government.
- 1.3 The Supplier will provide assessment and advice to DLUHC based on the following: (a) the revised National Evaluation Framework which will be common to all Areas under Review and include Performance Indicators agreed by DLUHC, and (b) bespoke local monitoring and evaluation frameworks (the Local Frameworks), reflecting as appropriate the key differences between the Areas, the types of local growth projects they are funding and, where relevant, how this investment works with other funding streams locally to invest in economic growth. These frameworks will outline the data the Areas will need to gather, which will be used by the Supplier to inform the Gateway Reviews.
- 1.4 The Supplier will also establish and oversee an independent academic advisory panel (from herein referred to as a "**Panel**") whose role will be to oversee the governance, project and impact assessments undertaken by the Areas and to advise and approve the Reports prepared by the Supplier that will be submitted to DLUHC.
- 1.5 The Supplier will have responsibility for:
 - 1.5.1 Proposing a short text to include at section 6 of the National Evaluation Framework; and reading and highlighting any text in the current draft (119 pages) of the National Evaluation Framework that the supplier considers to be unclear and needs reviewing by DLUHC.
 - 1.5.2 Agreeing a revised Local Evaluation Framework with each Area
 - 1.5.3 Convening and overseeing a Panel to oversee the governance, project and impact assessments undertaken and provided by the Areas



-
- 1.5.4 Providing a mid-term progress assessment; and a Final Report on each of the Areas progress against Performance Indicators ahead of their scheduled Gateway Review Challenge Sessions.
 - 1.5.5 Ensuring there is consistency in the assessments and evaluations from each of the Areas
 - 1.6 The commission is expected to be for a period of four years to March 2026 to cover the progress towards and the Gateway Reviews over this period.

2. BACKGROUND TO THE CONTRACTING AUTHORITY

- 2.1 The Contracting Authority, The Department for Levelling Up, Housing and Communities (DLUHC) supports communities across the UK to thrive, making them great places to live and work.
- 2.2 DLUHC's work includes investing in local areas to drive growth and create jobs, delivering the homes our country needs, supporting our community and faith groups, and overseeing local government, planning and building safety.

3. BACKGROUND TO REQUIREMENT / OVERVIEW OF REQUIREMENT

- 3.1 HMG has agreed long-term Investment Fund grants with 13 UK localities as part of City Deal, Growth Deal and Devolution Deal programmes (Annex A and B). The City Deals in Glasgow City Region and Cardiff Capital Region were agreed in partnership with the Scottish Government and Welsh Government respectively.
- 3.2 Each Investment Fund has different values and revenue-capital profiles. Funding is committed for up to 20 or 30 years. An integral part of each Deal was that an area had to agree to an independent evaluation leading up to a Gateway Review every five years, which assesses progress of the Investment Funds and make future funding decisions. The Gateway Review is therefore of major importance to the Areas and all stakeholders and a significant milestone in the Government's Investment Funds programme.
- 3.3 The Gateway Review assesses the impact Investment Funds have made in the local area on economic growth and inclusive growth. As well as the impact of the investment, the Gateway Review looks at how an area has met the requirements as set out in the National Evaluation Framework and articulated in their Local Evaluation Framework.



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

-
- 3.4 The individual deals are different but are based on the same principle that local control over investments can unlock economic growth locally, which improves economic growth at the national level.
- 3.5 The longer-term nature of the funding agreements provides more certainty for places and allows for combinations of interventions. The Gateway Review process is a way to capture this wider picture, i.e. the cumulative impact, strategic added value and interaction between interventions in each Area and nationally.
- 3.6 Areas started receiving payment of their Investment Funds at different times. Therefore, Areas have been split into three cohorts for evaluation purposes. Gateway Reviews for Cohort 1 Areas concluded in early 2020, and for Cohort 2 Areas in early 2021. The three Areas in Cohort 3 are now following a similar process. Details of the Cohorts and Gateway Review dates are outlined in Table 1 below.
- 3.7 The Gateway Reviews will provide the opportunity to demonstrate the strategic added value from nationally led policy and programme expenditure to locally-designed and delivered approaches.
- 3.8 Areas will be expected to undertake their own research and evidence gathering against the National Evaluation Framework and their Local Evaluation Framework and the Performance Indicators produced by HMG.
- 3.9 This specification requires the Supplier to propose a methodology that will guide, review and draw together material produced by the Areas in receipt of Investment Funds, and to establish an Academic Panel to provide expert analysis of the findings, to ensure the following:
- Evaluation reports to the Gateway Review are independent from Government and the Areas;
 - The Reports follow a consistent process across the Areas; We would expect the Reports produced for each Area to follow the same format.
 - The evaluation covers an area's progress over their five-year Gateway Review period.
- 3.10 It should be noted that
- 3.10.1 For the Glasgow City Region City Deal, a local Commission on Urban Economic Growth has been established. The full remit of the Commission and its relationship with the Panel is detailed in the Glasgow City Region City Deal (see Annex B). The expectation is that the Supplier would be able to gather the information required for the Mid-Term Report and
-



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

Gateway Review through the Commission and will need to ensure it is consistent with the other Areas.

- 3.10.2 The North of Tyne Combined Authority will not have a Gateway Review Final Report due over the period of the contract but the supplier is expected to work with North of Tyne Combined Authority to produce a Local Evaluation Framework and a Mid-Term Report

3.11 The dates for the Gateway Reviews are as follows:

Table 1
<u>Gateway Reviews to be covered by new framework contract</u>
Cohort 1 Areas
<u>Gateway 2 (Ten Year Reviews) -- Review Date 2024-25</u>
Greater Manchester, Glasgow City Region, Greater Cambridge, Leeds City Region
Cohort 2 Areas
<u>Gateway 2 (Ten Year Reviews) -- Review Date 2025-26</u>
Liverpool, West of England, West Midlands, Tees Valley, Cambridgeshire & Peterborough, and, Cardiff Capital Region
Cohort 3 Areas
<u>Gateway 1 (Five Year Reviews) & Gateway 2 (Ten Year Reviews)</u>
South Yorkshire, West Yorkshire – Gateway 1 Review date 2024-25; North of Tyne – Gateway 2 Review Date 2027-28 (<i>The North of Tyne Gateway Review will be outside of this contract but would involve engagement over the period of the contract</i>)



4. DEFINITIONS AND ACRONYMS

Expression or Acronym	Definition
Supplier	Means the successful bidder
Commission	The requirement set out in the tender specification
Areas	Means the Mayoral Combined Authority or partnership covered by a City Deal, Growth Deal or Devolution Deal in receipt of Investment Funds
Investment Funds	The grant received from the UK Government as part of an Area's City Deal, Growth Deal or Devolution Deal
DLUHC	Means the Department of Levelling Up, Housing, Communities and Local Government.
Authority or Contracting Authority	Means the Department of Levelling Up, Housing, Communities and Local Government.

5. SCOPE OF REQUIREMENT

- 5.1 Long-term Investment Fund grants with 13 UK Areas have been agreed as part of City Deal, Growth Deal and Devolution Deal programmes. An integral part of each Deal was that an area had to agree to an independent evaluation leading up to a Gateway Review every five years, which assesses progress and impact of the Investment Funds and make future funding decisions.
- 5.2 The supplier will ensure the collection of data from the Areas, and the establish an Academic Panel to provide expert analysis and to provide advice and recommendations on the finding in the Final Report. This will enable the commission to meet the following priorities:
- Evaluation reports are independent from Government and the Areas;
 - The Reports follow a consistent process across the Areas and Cohorts;
 - The evaluation covers an Area's progress over their five-year Gateway Review period.



5.3 The high level outputs required are:

- 5.3.1 Proposing a short text to include at section 6 of the National Evaluation Framework; and reading and highlighting any text in the current draft (119 pages) of the National Evaluation Framework that the supplier considers to be unclear and needs reviewing by DLUHC, by the milestone date detailed in section 7 [row 4](#) of the table at para 7.2 of this specification. (The current National Evaluation Framework is included in the tender document).

Working with the relevant areas as outlined below to agree the following:

- 5.3.2 An update to each Cohort 1 and Cohort 2 Area's Local Evaluation Frameworks (10 Areas) by the milestone dates detailed in section 7 [row 7a](#) and [row 7b](#), of the table at para 7.2 of this specification. The Local Evaluation Frameworks tailors National Evaluation Framework logic models and indicators to local areas based on their interventions. The Local Evaluation Frameworks also sets out agreed methods for evaluation, timescales and detailed monitoring requirements
- 5.3.3 Baseline Reports and Local Evaluation Frameworks for two Cohort 3 Areas (South Yorkshire Combined Authority, and West Yorkshire Combined Authority) by the milestone date detailed in section 7, [row 7c](#), of the table at para 7.2 of this specification. The baseline report will cover scope of interventions, evaluation activity, monitoring data and narrative on progress in delivery to date, and baseline data. (See page 17 and 46 of the draft National Evaluation Framework which is included in the tender documents)
- 5.3.4 A Local Evaluation Framework for North of Tyne Combined Authority by the milestone date detailed in section 7, [row 7d](#), of the table at para 7.2 of this specification.
- 5.3.5 Mid-Term progress reports for the Area's and at the at the milestone dates detailed in [section 8](#) of the table at para 7.2 of this specification. The Mid-Term Report provides an overall review of the progress to date and highlight any issues or movement in the delivery programme that have arisen in during the current Gateway Review period. The Mid-Term Report provides an opportunity for Government to feedback and/or flag any issues that would be helpful to the Areas and the Independent Evaluator in the lead up and preparation of their Final Report. It is therefore expected to be



a lighter touch report than the in-depth analysis expected for an Area's Gateway Review Final Report.

5.3.6 A Gateway Review Final Report for the Area's and at the at the milestone dates detailed in [section 9](#) of the table at para 7.2 of this specification. The Final Report will assess whether interventions in each Area have provided cumulative positive impact upon economic growth based on metrics, Performance Indicators and any relevant mitigating factors.

5.3.7 Risk Register for this commission

5.4 These high level outputs will address the objectives described in Section 6, The Requirement.

5.5 The scope of the commission is the evaluation of the impact of Investment Funds in the thirteen Areas in receipt of such grant funding. This includes projects that were either funded in full or in part by Investment Funds

5.6 Out of Scope

5.6.1 Evaluation of projects that were not recipients of Investment Funds

6. THE REQUIREMENT

6.1 Bidders are invited to submit their proposals for suitable methodology to deliver the scope in Section 5.

6.2 The Supplier will be expected to undertake two specific elements for this commission: to review, feedback to Areas and report to DLUHC on material produced by the Areas; and the establishment and convening of an Independent Academic Advisory Panel who will be responsible for advising on evaluation methods, data analysis, and interpretation, and 'peer review' of frameworks and evaluation findings, including Gateway Review Reports to oversee, quality assure the report on Areas, and make recommendations on the Areas' reports.

To guide, review and report on material produced by the Areas.

6.3 In the first three months of the contract, the Supplier will:

6.3.1 Propose a short text to include at section 6 of the National Evaluation Framework; and read and highlight any text in the current draft (119 pages) of the National Evaluation Framework that



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

-
- the supplier considers to be unclear and needs reviewing by DLUHC.
- 6.3.2 Establish the membership, Terms of Reference and delivery plan of the Academic Panel (also see sections 6.9 to 6.16 below). Costs relating to the panel should be inclusive in the overall tender price.
- 6.3.3 Recommend and seek approval from the Academic Panel, a core methodology to create a consistent approach to reviewing each Areas reporting of their monitoring and evaluation performance as measured against DLUHC's Performance Indicators
- 6.4 The Supplier will agree an update to each Area's Local Evaluation Plan as detailed in Para 7 (7a and 7b) so that it reflects the National Evaluation Framework and Performance Indicators. For the Areas undertaking their first Gateway Reviews, the Supplier will help develop these Areas' Baseline Reports and first Local Evaluation Plans as detailed in Para 7 (7c and 7d).
- 6.4.1 Agree a schedule of meetings with each Area, setting out timescales and ways of working. Timescales should reflect the timings of each Area's five-year Gateway Reviews. (See above table for dates of the Gateway Review).
- 6.4.2 The supplier will be expected to read each Local Evaluation Plan and make suggestions for changing text and data that is out of date, requires removing or replacing, make suggestions if there is information that they feel is missing, as well as changes in local circumstances that need to be reflected. The supplier will agree with each Area a final version of their Local Evaluation Plan.
- 6.4.3 The two Areas undertaking their first Gateway Review will also require assistance in scoping of their baseline data and evaluation practices and processes and to produce their first Baseline report and Local Evaluation Frameworks so it is recognised this may take longer to complete.
- 6.4.4 The North of Tyne Combined Authority will also require a first Local Evaluation Framework following the completion of its initial Gateway Review in January 2023
- 6.5 The Supplier's contact with the 13 Areas should be on an ongoing, regular basis, and should:
-



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

-
- 6.5.1 Identify the availability of metrics and data sets produced by each Area. These data sets will be used to assess the Areas long term local, regional and national economic impact of interventions at Gateway Review points, as measured against DLUHC's Performance Indicators.
- 6.5.2 Apply the core methodology coherently and consistently across the Areas in order to report the outcome of each Areas evaluating material as measured against DLUHC's Performance Indicators
- 6.5.3 The supplier should explain its methodology for assessing the metrics and data sets gathered by each Area. The supplier should provide details of how they would identify and help work with the Areas to correct any gaps in the metrics and data provided by an Area, which may prevent them from demonstrating how they are meeting DLUHC's Performance Indicators.
- 6.5.4 Provide verbal advice through Phone/Teams/Zoom calls to Areas as required, which will be documented to ensure a record is kept. The supplier is asked to provide an indicative time of 3 hours a month in total i.e. covering all calls to all Areas

“An ongoing regular basis” means as frequently as required in order to appropriately guide Areas to provide the assessment information required for their Gateway Reviews. An indicative time commitment is estimated at up to ten days per Area per year

6.6 The Supplier will need to provide the following information to DLUHC

- 6.6.1 Provide monthly written report ahead of verbal progress updates, reporting any concerns with an Area's progress to DLUHC. We would expect the updates to cover: the suppliers progress against the [milestones in the table at para 7.2](#) of this specification; performance against the [KPIs](#); any issues or concerns the supplier has in delivering against their milestones; the performance of the academic panel and details of the advice it has provided to the supplier; an update of the risk register; how the supplier is achieving its [social value commitments](#). We would expect the monthly update meetings to be through Phone/Teams/Zoom and take no more than 2 hours.
- 6.6.2 Where appropriate, provide separate written updates to DLUHC highlighting the concern with an Area's progress and recommendations for improvement. This could be in the form of one-off or regular communication with DLUHC, recognising that each Area will require



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

-
- different levels of interaction. The supplier should seek and report to DLUHC the views of the Academic Panel regarding their concerns and suggestions to resolve the concerns
- 6.6.3 Using a consistent format, draft of formal Mid-Term Report and recommendations for each Area. The Mid-Term Report should outline progress to DLUHC/HMT, and the Area, as well as give details about any areas of concern on progress or data collection, highlighting where further/improved evidence is required.
- 6.6.4 Seek the views of the Academic Panel during drafting and reviewing of Mid-Term Reports. We would expect the report to be fact checked by the Area and to have formal sign-off by the Academic Panel, before submitting to DLUHC.
- 6.6.5 Submit a formal Gateway Review Final Report to both the relevant Area and DLUHC at each Area's five-year Gateway Review point (see table above). The Final Report will assess whether interventions in each Area have provided cumulative positive impact upon economic growth based on metrics, Performance Indicators and any relevant mitigating factors. These will inform decision-making by Government ministers regarding future funding. Using a consistent format, draft each Area's Final Report should be submitted at least two months ahead of their Gateway Review Challenge Session.
- 6.6.6 Seek the views, input and recommendations of the Academic Panel during drafting and reviewing of each Final Report. We would expect the report to be fact checked by the Area to ensure they have the opportunity for clarification. The Final Report will need to have formal sign-off by the Academic Panel, before submitting to DLUHC
- 6.6.7 For the two Areas in Cohort 3, who will be undertaking their first Gateway Review in 2024-25 (South Yorkshire Mayoral Combined Authority, and West Yorkshire Combined Authority), the supplier will also need to work with these Areas to collect, collate and analyse baseline data and share this information with DLUHC.
- 6.7 The Supplier should set out how it would ensure that it would be operationally and presentationally independent from any other evaluation work it may be undertaking for any of the Areas, over the period of the Commission.
- 6.8 At the end of this Commission, the supplier should provide a short report (no more than 30 pages) explaining how they would improve the Gateway Review process; draw out evidence from the monitoring and evaluation to inform the design and
-



development of future devolution deals; and/or the monitoring and evaluation of any future programme.

Establishment and convening of an Independent Academic Advisory Panel to oversee, quality assure and make recommendations on the Area reports

- 6.9 The Supplier will establish and convene an Independent Academic Advisory Panel (Academic Panel) to review and provide advice on the quality of evidence provided by each Area against the expectations of the National Evaluation Framework, an Area's Local Evaluation Framework and Performance Indicators;
- 6.10 The Panel will be expected to oversee, review, make recommendations and sign off each Area's Gateway Review Mid-Term Report; and Final Report, which has been drafted by the Supplier, before it is submitted to DLUHC by the Supplier.
- 6.11 The Supplier should include the proposed membership of the Academic Panel, setting out the skill sets they would bring to the Commission. In accordance with General Data Protection Regulation (GDPR) the Supplier would need to provide a Privacy Notice to members of the Academic Panel.
- 6.12 The Panel will need to have regard to factors such as the availability of data, the availability of baseline data, regional and local issues, and the ability to attribute changes in outcomes to Investment Fund interventions,
- 6.13 This advice from the Academic Panel should look to:
- 6.13.1 Comment on the availability and quality of data sets provided by each Area and advise where improvements are required to ensure evidence is available to evaluate against the Performance Indicators.
 - 6.13.2 Assess and advise how appropriately each Area is utilising existing locally-gathered data, recognising local operational, resource and value for money requirements.
 - 6.13.3 Draw on the latest theory and methods from spatial and urban economics, as well as lessons from evaluations of similar interventions and advise Areas where necessary to ensure consistency.
 - 6.13.4 Be standardised as far as possible as per the core monitoring to ensure consistency across the reporting of each area's performance.



- 6.14 The Supplier should include the proposed membership of the Academic Panel, setting out the skill sets they would bring, to help meet the Commission.
- 6.15 In establishing the Academic Panel, the Supplier should set out how they would work with the Academic Panel, ensuring accountabilities and responsibilities are agreed, and the working arrangements they would put in place to ensure timely advice is provided and reports are cleared on time.
- 6.16 In conducting an assessment of the economic impact and value of the Investment Fund programme, the Supplier and Academic Panel should be aware that such appraisal will need to comply with the [HMT Green Book](#)¹. Therefore, the Commission should clearly distinguish between impacts that can be recognised in economic appraisals according to current appraisal guidance and those which cannot. Notwithstanding the above, the Commission should seek to cover all material impacts of the Investment Funds.
- 6.17 The Supplier will be required to attend a telephone Inception meeting within one week of the contract award.

7. KEY MILESTONES AND DELIVERABLES

- 7.1 The contract will end by 31st March 2026 when Cohort 2 Areas will have completed their second Gateway Reviews.
- 7.2 The following Contract milestones/deliverables shall apply:

Milestone / Deliverable	Description	Timeframe or Delivery Date
1	Inception meeting with Department policy and analysts	Within week one (1) of Contract Award
2	Ahead of a monthly meeting with DLUHC, provide a written monthly progress report to DLUHC including Project Plan review; Risk Register Update; and progress of Areas	Monthly
3.1	Convene the Independent Academic Panel and agree Terms of Reference and ways of working.	Three months following contract award

¹ HMT The Green Book, 2020
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/685903/The_Green_Book.pdf



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

3.2	Agree with the Academic Panel, a core methodology to create a consistent approach to reviewing each Areas reporting of their monitoring and evaluation performance as measured against DLUHC's Performance Indicators	Three months following contract award
4	Propose a short text to include at section 6 of the National Evaluation Framework; and read and highlight any text in the current draft (119 pages) of the National Evaluation Framework that the supplier considers to be unclear and needs reviewing by DLUHC.	Three months following contract award
5	Agree timetable for Mid-Term Reports and Final Reports with each Area	Four months following contract award
6	Agree with each of the 13 Areas an individual engagement timetable.	Four months following contract award
7. Local Evaluation Frameworks		
7a	Agree a revised Local Evaluation Framework with each Area in Cohort 1	By 31 January 2023
7b	Agree a revised Local Evaluation Framework with each Area in Cohort 2	By 28 February 2023
7c	Agree a Baseline Report and a Local Evaluation Framework with both South Yorkshire CA, and West Yorks CA	By 28 February 2023
7d	Agree a Local Evaluation Framework with North of Tyne CA	By 31 May 2023
8. Mid-Term Reports		
8a	Mid-Term Reports provided by Cohort 1 Areas	By 30 June 2023



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

8b	Mid-Term Reports provided by Cohort 2 Areas	By 29 February 2024
8c	Mid-Term Reports provided by Cohort 3 Areas (South Yorkshire CA, and West Yorks CA)	By 30 June 2023
8d	Mid-Term Report provided by Cohort 3 Area (North of Tyne)	By 1 February 2026
9. Gateway Review Final Reports		
9a	Gateway Review Final Reports provided by Cohort 1 Areas	By 31 October 2024
9b	Gateway Review Final Reports provided by Cohort 2 Areas	By 31 October 2025
9c	Gateway Review 1 Final Reports provided by Cohort 3 Areas (South Yorkshire CA, and West Yorks CA)	By 31 October 2024
10	End of contract report	By 1 February 2026

8. MANAGEMENT INFORMATION/REPORTING

- 8.1 The Supplier will provide all outputs ensuring that are compatible in Microsoft Word and Microsoft Excel, in plain English and to be quality assured and proof read by the Supplier before submission to the Authority.
- 8.2 The Supplier should include a senior leader who is the single point of accountability and can act as the lead contact for DLUHC in managing the contract.
- 8.3 Throughout the Contract, the Supplier will be expected to organise a monthly telephone, virtual or face to face review meeting with the Contracting Authority to ensure the commission remains on track.
- 8.4 At the monthly review meetings, (see para 6.61 regarding the content of the written monthly update) the Supplier will circulate an update against milestones and an update of all action points from recorded form previous update meetings that are ongoing or have been completed since the previous meeting. The supplier will send a written record of each monthly progress meeting, to all attendees, for agreement by all attendees, within two (2) working days of the meeting taking place.



8.5 The Supplier will record and circulate details of any ad-hoc meetings and conversations with the Contracting Authority as necessary.

8.6 The Supplier will deliver an end of contract report no later than 1 February 2026

9. CONTINUOUS IMPROVEMENT

9.1 The Supplier will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.

9.2 The Supplier should present new ways of working to the Contracting Authority during Contract review meetings.

9.3 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

10. SUSTAINABILITY

10.1 Suppliers should set out how they will operate in a way that demonstrates collaboration throughout the supply chain, and a fair and responsible approach to working with supply chain partners in delivery of the contract. See Model Award Criteria (MAC) 3.4 in the following link https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/940826/Social-Value-Model-Edn-1.1-3-Dec-20.pdf

10.2 Suppliers should note that 10% of the award criteria will be attributed to Social Value (see Questionnaire 6 of the Award Criteria) and that bidders will be expected to deliver Social Value specifically as a result of being awarded this contract.

10.3 As part of the written monthly update report (see para 6.6.1), the supplier will provide a written update detailing how they are achieving their social value commitments.

11. QUALITY

11.1 The delivery of the commission should be conducted in line with the Contracting Authority's objectives and the ethical standards set out in the Government Social Research code. <https://www.gov.uk/government/publications/the-government-social-research-code-people-and-products> Research should be analytically robust, and ethically conducted.

11.2 All contractable deliverables must be of publishable quality under the Supplier name. The Contracting Authority will convene meetings at the Mid-Term and



Final Report stages with the Supplier, to assess the quality of the deliverables when complete.

- 11.3 The Supplier must have sound processes for quality assurance in place. The Supplier must outline in their bid submission their internal procedures for assurance and quality control in reference to all aspects of the programme of research in relation to this Contract.

12. PRICE

- 12.1 Prices are to be submitted via the eSourcing Suite using the Annex C – Price Schedule. Prices must be excluding VAT and including all other expenses relating to Contract delivery.

- 12.2 Bidders will be required to submit pricing for the following elements:

12.2.1 Input to the National Evaluation Framework

- 12.2.1.1 The Bidders should submit pricing based on proposing a short text to include at section 6 of the National Evaluation Framework; and to read and highlight any text in the current draft (119 pages) of the National Evaluation Framework that the supplier considers to be unclear and needs reviewing by DLUHC

- 12.2.1.2 The price will be a firm price for the resultant contract

- 12.2.1.3 The price must reflect the Bidder's offered Day Rates

- 12.2.1.4 Any costs not included in the Price Schedule will be deemed to be waived

12.2.2 Delivery of Local Evaluation Frameworks

- 12.2.2.1 The Bidder should provide detailed costs on each element of the activities for delivering Local Evaluation Frameworks as required in section 7 of the table in Para 7.

- 12.2.2.2 The Bidder should provide a price per Area based on three scenarios: the price per area of a good performing Area; the price per Area, where the Area is in need of a lot of engagement; and, the price of an Area which is developing its first Local Evaluation Framework.

- 12.2.2.3 This price will be firm price for the resultant contract.



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

12.2.2.4 The price must reflect the Bidder's offered Day Rates.

12.2.2.5 Any costs not included in the Price Schedule will be deemed to be waived.

12.2.3 Delivery of Mid-Term Reports

12.2.3.1 The Bidder should provide detailed costs on each element of the activities for delivering Mid-Term Reports as required in section 8 of the table in Para 7.

12.2.3.2 The Bidder should provide a price per Area based on two scenarios: the price per area of a good performing Area; and, the price per Area, where the Area is in need of a lot of engagement.

12.2.3.3 This price will be firm price for the resultant contract.

12.2.3.4 The price must reflect the Bidder's offered Day Rates.

12.2.3.5 Any costs not included in the Price Schedule will be deemed to be waived.

12.2.4 Delivery of Gateway Review Final Reports

12.2.4.1 The Bidder should provide detailed costs on each element of the activities for delivering Local Evaluation Frameworks as required in section 9 of the table in Para 7.

12.2.4.2 The Bidder should provide a price per Area based on two scenarios: the price per area of a good performing Area; and, the price per Area, where the Area is in need of a lot of engagement.

12.2.4.3 This price will be firm price for the resultant contract.

12.2.4.4 The price must reflect the Bidder's offered Day Rates.

12.2.4.5 Any costs not included in the Price Schedule will be deemed to be waived.

12.2.5 Delivery of an end of contract report

12.2.5.1 Bidders should submit pricing based on completing an end of contract report



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

12.2.5.2 The price will be a firm price for the resultant contract

12.2.5.3 The price must reflect the Bidder's offered Day Rates

12.2.5.1 Any costs not included in the Price Schedule will be deemed to be waived

12.2.6 Rate Card

12.2.6.1 Bidders must confirm their Daily Rates for this project, which should reflect any applicable discounts. Daily rates submitted will remain firm throughout the life of the Contract. Please note these Daily Rates are for information only and will not be evaluated but should still be submitted via the eSourcing Suite (Annex C – Price Schedule).

12.2.6.2 The Supplier's submitted Day Rates must be inclusive of Travel and Subsistence.

12.3 Up to a limit of £1.95M ex VAT has been budgeted for this commission. Bids exceeding this will be non-compliant. Any increase in scope or value will be subject to the contract variation process. The commission to run between August 2022 and March 2026.

13. STAFF AND CUSTOMER SERVICE

13.1 The Supplier shall provide a sufficient level of resources throughout the duration of the commission in order to consistently deliver a quality service.

13.2 The Supplier's staff assigned to the commission shall have the relevant qualifications and experience to deliver the commission to the required standard.

13.3 The Supplier shall ensure that staff understand the Contracting Authority's purpose and objectives and respond to queries raised by the Authority within 48 hours throughout the duration of the Contract.

14. SERVICE LEVELS AND PERFORMANCE

14.1 We encourage suppliers to propose key performance indicators for their work. The Contracting Authority will consider these, and otherwise measure the quality of the Supplier's delivery by:

KPI/SLA	Service Area	KPI/SLA Description	Target
---------	--------------	---------------------	--------



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

1	Delivery Milestone	Inception Meeting within one (1) week of Contract Commencement	100%
2	Delivery Milestone	Initial draft of Project Plan and Risk Register to be produced within two (2) weeks of Contract Award and updated throughout contract	100%
3.	Delivery Milestone/Project Management	Monthly updating of Project Plan and Risk Register	100%
4	Delivery Milestone/Project Management	Attendance at monthly Teams or face to face progress meetings	100%
5	Delivery Milestone	Delivery of short text for inclusion to the National Evaluation Framework; and highlight any text that the supplier considers needs reviewing by DLUHC	100%
6	Delivery Milestone	Agree reporting Timetable with each area	100%
7	Delivery Milestone	Delivery of Local Evaluation Frameworks as agreed in the Areas' timetable.	100%
8	Delivery Milestone	Delivery of Mid-Term Reports as agreed in the Areas' timetable.	100%
9	Delivery Milestone	Delivery of Gateway Review Final Reports	100%



Schedule 2 – Specification
[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City
Deal, Growth Deal and Devolution Deals

		as agreed in the Areas' timetable.	
10	Delivery Milestone	Delivery of Final Report by 1 Feb 2026	100%
11	Project Management	Brief progress reports to be provided by email by the Supplier no later than one (1) working day before monthly progress meetings	100%
12	Project Management	All action points from progress meetings to be circulated by Supplier and agreed by all attendees within two (2) working days	100%
13	Risk Management	The Supplier will keep an up to date Risk Register, which will be submitted to the Authority no later than one (1) working day prior to scheduled progress meetings.	100%
14	Account Management	All queries will be responded to within one (1) working day by Supplier	100%
15	Account Management	All issues shall be addressed and resolved within three (3) working days by Supplier	100%

14.2 The Authority will maintain a record of Supplier adherence to the agree service level and performance timelines. The Supplier will circulate the record at the monthly progress meeting. Any non-adherence will result in performance review meetings between the Authority and the Supplier, to provide a full debrief



and explanation as to why service level agreements have not been met. Improvement plans will also be established here. Performance Management will be in accordance with Terms and Conditions as set out in Annex B – Terms and Conditions.

- 14.3 Where the Supplier fails to provide a Service Improvement Plan or to deliver the agreed Service Delivery Plan to the standard required, the Authority reserves the right to seek early termination of the contract in accordance with the procedures set out in Annex B – Terms and Conditions.

15. SECURITY AND CONFIDENTIALITY REQUIREMENTS

- 15.1 The Authority will retain full Intellectual Property Rights for the work completed. This is in accordance with the Annex B – Terms and Conditions.
- 15.2 The Supplier shall provide Privacy Notices to Academic Panel members in instances where their details are to be shared with DLHUC.

16. PAYMENT AND INVOICING

- 16.1 Payment can only be made following satisfactory quality of reports and delivery of Key Milestones (section 7). Guidance on the quality of reports will be given at the monthly meetings.
- 16.2 Submission of invoices will be agreed with the supplier following the award of the contract.
- 16.3 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed against each milestone and the associated costs.
- 16.4 Invoices should be submitted to: DLUHC, CIP Team, 4th Floor, High Trees, Hillfield Road, Hemel Hempstead, Herts, HP2 4XN. Email address: CLGInvoices@communities.gov.uk

17. CONTRACT MANAGEMENT

- 17.1 The Contracting Authority will ensure all contractual obligations are adhered to and managed accordingly. A key contact will be identified within the Authority as the Contract Manager to oversee the project. Any Supplier queries will be addressed and responded to within three (3) working days by the Contract Manager. The Contracting Authority will provide suitably qualified persons to attend and chair supplier meetings when required to do so.



-
- 17.2 The Contracting Authority will manage Supplier meetings, arranging venues if necessary, times, producing agendas and minutes. Attendance at Contract Review meetings shall be at the Supplier's own expense.

18. LOCATION

- 18.1 The Services will primarily be carried out at the Supplier's premises with visits to DLUHC offices and Areas' locations in England, Scotland and Wales as required.
- 18.2 The Supplier is required to work in accordance to the latest Government Guidance on Covid 19.



Annex A: Summary of Investment Fund Grants		
	Cohort	Total committed £m
Mayoral Combined Authority Devolution Deals		
Greater Manchester CA	1	900
Cambridgeshire and Peterborough CA	2	600
Liverpool City Region CA	2	900
Tees Valley CA	2	450
West of England CA	2	900
West Midlands CA	2	1,095
North of Tyne CA	3	600
South Yorkshire CA	3	900
West Yorkshire CA	3	1,140
City Deals		
Glasgow City Region*	1	1,130
Greater Cambridge Partnership	1	500
Cardiff Capital City Region**	2	1,120
Growth Deals		
Leeds City Region	1	600



* HMT block grants (£500m from UK & Scots Gov), plus £130m locally

**HMT block grants (£500m from UK & Wales Gov) plus £120m locally

Annex B: Links to City, Growth and Devo Deals

Greater Manchester CA	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/369858/Greater_Manchester_Agreement_i.pdf
West Midlands CA	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/477421/West_Midlands_devolution_deal_unsigned_final_web.pdf
Tees Valley CA	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/470127/Tees_Valley_Devo_Deal_FINAL_formatted_v3.pdf
Liverpool City Region CA	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/477385/Liverpool_devolution_deal_unsigned.pdf
West of England CA	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/508112/160315_West_of_England_Devolution_Agreement_Draft_-_FINAL.pdf



Schedule 2 – Specification

[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City Deal, Growth Deal and Devolution Deals

Cambridgeshire Peterborough CA	and	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/600239/Cambridgeshire and Peterborough Devolution Deal.pdf
North of Tyne CA		https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/754719/North of Tyne Deal.pdf
South Yorkshire CA		https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/466616/Sheffield devolution deal October 2015 with signatures.pdf
West Yorkshire CA		https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/872465/West Yorkshire Devolution Deal.pdf
Greater Cambridge Partnership		https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/321722/Greater Cambridge City Deal Document.pdf
Glasgow City Region		https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/346278/Glasgow Clyde Valley City Deal.pdf
Cardiff Capital City Region		https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/508268/Cardiff Capital Region City Deal.pdf



OFFICIAL

Schedule 2 – Specification

[CPD/004/122/124] Provision of Services for the Independent Evaluation (Gateway Reviews) of City Deal, Growth Deal and Devolution Deals

Leeds City Region	https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/398863/20_Leeds_City_Region_Growth_Deal.pdf

OFFICIAL