



Department
for Education

Cross-sector partnerships grant

Bidding guidance

Bidding opening date: 9 October 2019

Bidding closing date: 29 November 2019

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About the programme

Who can bid

This programme is open to all schools (state-funded or independent), higher education, and further education providers in England. In order to bid, partnerships must involve a minimum of two schools/higher education providers.

To bid, partnerships must nominate a lead school/institution or entity that will receive the grant award on behalf of the partnership. Please see *Part 3* for further guidance on the types of institutions who can act in this role. For successful bids, the lead school/institution becomes the Grant Holder.

As this grant programme is designed to promote engagement across sectors, partnerships must also involve a minimum of one school/institution from an educational sector different to the Grant Holder's sector.

Definition of educational sectors

For the purposes of this programme, the sectors are defined as:

- State-funded schools (either central government or local authority-funded)
- Independent schools
- Higher education or further education providers

Where state-funded schools are unable to partner with schools/institutions in other sectors due to exceptional circumstances, for instance, a lack of schools/institutions from other sectors in a rural area, this must be clearly stated and evidenced in *Appendix A to the specification (partnership proposal)*. To clarify, under no circumstances would two or more independent schools, or two or more higher education or further education providers receive grant without at least one state-funded school in the partnership.

Opening and closing dates

The bidding window opens on **Wednesday 9 October 2019**.

The bidding window closes at **15:00 on Friday 29 November 2019**.

Enquiries

If you have an enquiry that is related to the policy content or the bidding process of the programme, you can email system.partnerships@education.gov.uk.

Part 1: General guidance

Bidding criteria

Bidders will need to provide evidence showing how they meet the following criteria:

- **Sustainability** – demonstrating how the partnership is/will be built sustainably, particularly in terms of staff resources, financial resources, and the ongoing engagement of senior leaders across partner schools/institutions
- **Impact** – demonstrating positive and lasting impact on students and teachers, and ensuring that resources are being put to good use
- **Mutual benefit** – demonstrating how the partnership is/will be built on a philosophy that all schools have a contribution to make, and that all partners will share the benefits of their work
- **Tackling disadvantage** – demonstrating how partnership activities will benefit pupils from disadvantaged backgrounds.

Grant categories

There are two categories of grant available:

- **Seed funding grant** – aimed at enabling new partnerships to get off the ground
- **Expansion grant** – primarily aimed at expanding the impact of existing partnerships

Bidders will need to make clear in the *Bid document* which they are bidding for (see *Part 3*).

Seed funding grant

This category is intended to support new partnerships to get off the ground. Partnerships under this category will be eligible to bid for a one-off payment of up to and including £5,000. This type of grant does not require match funding. Should a new partnership wish to bid for an amount greater than £5,000, they may bid for expansion grant, but would need to meet all requirements for that grant, including the provision of match funding.

Full details associated with seed funding grant:

Purpose	To enable new partnerships to get off the ground
Amount	Bids of up to and including £5,000 of department funding
Age groups and stages	Partnership activities from Key Stage 1 to Key Stage 5
Payment	One-off payment. The date of payment will be made clear in grant letters. Should there be a time-sensitivity around the payment date, this should be made clear in partnership proposals (<i>document 3</i>)

Expansion grant

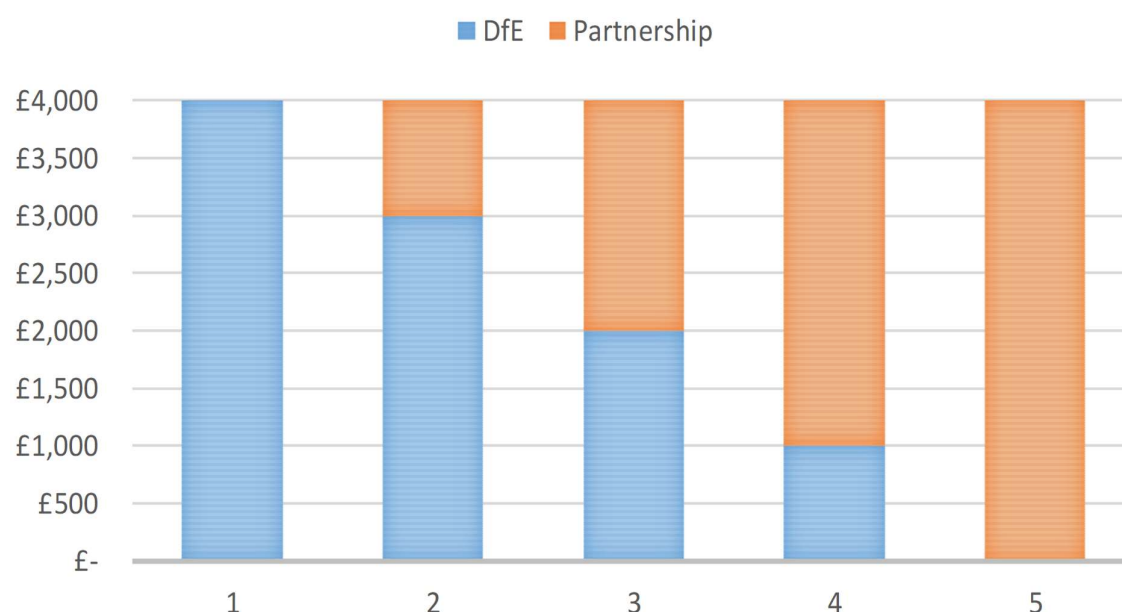
This category is intended to support existing partnerships to deepen and expand, allowing them to think ambitiously about how this resource could be used to provide even greater opportunities to children and teachers. This grant should be used to build on existing arrangements, expand and/or deepen the programme of activities, and deliver a boost to the overall impact of the partnership. We encourage established partnerships to bid for amounts from £5,001 and up to £20,000. This type of grant will require partners to match the department's contribution. Partnerships may wish to contribute more, but will need to at least match the amount funded by the department.

Full details associated with expansion grant:

Purpose	To support the expansion of existing partnerships. Please note that although the primary purpose of this type of grant is to support existing partnerships, new partnerships which meet the requirements, including match funding, may also bid for this type of grant
Amount	Bids from £5,001 and up to and including £20,000 of department funding
Age groups and stages	Partnership activities from Key Stage 1 to Key Stage 5
Match funding requirement	Match funding is required for all expansion grant awards in order to promote sustainability beyond the grant period. The department's contribution must be matched pound for pound by the partnership, with the exception of allowable in-kind contributions (see below)
In-kind contributions	<p>Frequently, individuals taking partnership activities forward are working full-time as teachers, with this work carried out in addition to, and done around, their normal duties. For that reason, staff time can be included as an in-kind contribution under the taper model for match funding (outlined below). Partnerships wishing to include staff time in lieu of financial contributions will be expected to cost out staff time and justify those calculations in their bids, in order to ensure a contribution equal to that of the department.</p> <p>We will also accept bids that use part financial contributions and part in-kind staff time contributions. As above, each bid should justify how costs have been calculated. The department reserves the right to reject a bid that does not reflect a fair and accurate representation of costing</p>
Payment	Payments via a taper model, to be paid out in tranches, as shown in <i>Figure 1</i> . For each successful bid, the funding profile

	of the grant will mirror the school's application but will not exceed £8k in any one tranche (based on the maximum award of £20,000).
	The payment schedule will be made clear in grant letters.

Figure 1: Tranche and taper model. Example assumes £10,000 grant from the DfE (plus £10,000 match funding portion from the partnership)



The tranches shown in the example in *Figure 1* would be paid out as follows:

Tranche	Date of payment	Notes
Tranche 1	March or April 2020	Maximum payment by DfE
Tranche 2	May 2020	
Tranche 3	September 2020	
Tranche 4	March 2021	Final payment by DfE
Tranche 5	September 2021	Maximum payment by partnership

In *exceptional* circumstances, the department reserves the right to discuss with bidders the possibility of modifying payment profiles before entering into an agreement.

What grant can be used for

We encourage partnerships to be bold and innovative in their bids. Below, we outline examples of how the grant may be used, but it should be noted that this does not represent an exhaustive list. Each partnership should construct their bid around their intended outcomes and objectives, including any that are not outlined in examples in *Table 1*.

Bidders must also clearly demonstrate how they will meet the requirements of the programme – sustainability, impact, mutual benefit and tackling disadvantage.

Table 1: Examples of activities and grant spend, linked to partnerships objectives

Example objective	Example activities	Example of grant spend
Address local modern foreign language (MFL) teacher shortage in order to give pupils across the partnership access to language teaching	<ul style="list-style-type: none"> ▪ Second/share MFL teaching resource with schools that are struggling to recruit, or who do not have the resource to employ a language teacher full-time ▪ Hold mixed language classes, inviting pupils from across the partnership to joint lessons 	<ul style="list-style-type: none"> ▪ To cover fees associated with a capacity audit among partner schools ▪ Transport of pupils to joint language classes
Address skills shortages and knowledge gaps on governing boards	<ul style="list-style-type: none"> ▪ Identify leaders from across partner schools and develop a programme for matching talent to known knowledge or skills gaps 	<ul style="list-style-type: none"> ▪ Fees associated with a governance skills/capacity audit
To encourage more girls to take an interest in science and technology subjects	<ul style="list-style-type: none"> ▪ Hold mixed science and/or technology classes, inviting girls from across the partnership to joint lessons ▪ Programme of speakers and/or specialist teaching staff to inspire next generation of students 	<ul style="list-style-type: none"> ▪ Hire of specialist facilities, such as science labs ▪ Purchase of specialist learning resources and equipment ▪ Transport of pupils to joint classes
Provide support for heads of department, drive out silo-working and ensure that best practice is shared	<ul style="list-style-type: none"> ▪ Targeted CPD programme ▪ Regular joint meetings of department heads to share ideas and find solutions to common concerns 	<ul style="list-style-type: none"> ▪ CPD learning materials ▪ Purchase of specialised training programme
Widen the curriculum offer across partner schools, focusing on areas of need	<ul style="list-style-type: none"> ▪ Shared use of facilities (such as labs, studios, sports grounds) alongside tuition and teaching resource 	<ul style="list-style-type: none"> ▪ Hire of specialist facilities, such as music, arts and drama studios ▪ Purchase of specialist learning resources and equipment
Provide university and career transition advice to ensure all students are well prepared for their next stage	<ul style="list-style-type: none"> ▪ Hold mixed university preparation sessions. Second/share careers advisers. ▪ Jointly plan a careers advice programme 	<ul style="list-style-type: none"> ▪ Transport of pupils to university preparation events

As outlined in the *Terms and Conditions*, grant funding can only be used to support the activities to which they relate and cannot be used for any other purpose. All purchases and spending commitments are made on behalf of the partnership as a whole (not individual institutions), and are intended to meet partnership objectives.

Documents to be supplied by bidders

All bidders are required to submit certain documents, in order to allow assessment to take place. The documents required depend on the category of grant being sought, as outlined below.

Seed funding grant

Please note that scoring elements appear in red in *Table 2* below. See *Part 2* for information regarding assessment and scoring.

Table 2: Documents required for seed funding grant bid

Doc. ref.	Document
1	Bid document
1A	Sustainability statement
1B	Mutual benefit statement
1C	Tackling disadvantage statement
2	Appendix A to the specification (partnership proposal)
2A	Outline of objectives
2B	Outline of activities to be undertaken by the partnership
2C	Impact evaluation plan
2D	Purchase and spending plan

Expansion grant

Please note that scoring elements appear in red in *Table 3* below. See *Part 2* for information regarding assessment and scoring.

Table 3: Documents required for expansion grant bid

Doc ref.	Document
1	Bid document
1A	Sustainability statement
1B	Mutual benefit statement
1C	Tackling disadvantage statement
2	Appendix A to the specification (partnership proposal)
2A	Outline of objectives
2B	Outline of activities to be undertaken by the partnership
2C	Impact evaluation plan
2D	Purchase and spending plan
3	Letter confirming allocation of match funding

General notes for both grant categories

We are determined to ensure that all bidders are able to provide information that is proportionate to the amount of grant being requested. We also want to ensure that bidders are given maximum flexibility in articulating the merits of their partnership plans. In order to do this, we are requiring each bidder to complete the *Bid document* (document ref. 1), which provides space for statements against the criteria, as outlined below:

- 1A – Sustainability statement
- 1B – Mutual benefit statement
- 1C – Tackling disadvantage statement

We also require a partnership proposal, referred to throughout this document as *Appendix A to the specification* (document ref. 2). For successful bids, the partnership proposal will become the main document used by the department to evaluate delivery. Whilst we are not imposing a set level of detail required for each proposal, we expect each to balance the need for sufficient information to allow a considered assessment of the bid whilst being proportionate to the amount of grant being sought.

Bidders may either use the template document supplied (at the end of document 1), or submit a separate proposal in their own format. However, it must, as a minimum, be clearly labelled '*Appendix A to the specification (partnership proposal)*' and contain headings 2A to 2D, as outlined below:

- 2A – Partnership objectives
- 2B – Partnership activities
- 2C – Impact evaluation plan
- 2D – Purchase and spending plan

It is up to each bidder to determine the quantity of information provided under each heading. As a general rule, we will require less detail for seed funding grant than for expansion grant bids. Any information provided in addition to 2A to 2D will be considered, but will not be scored. Please see *Part 3* for further information on documents 1 and 2.

Expansion grant bids only: you will also need to supply evidence that match funding has been allocated. This should be in the form of a letter (document ref. 3) which clearly explains the budget arrangements, signed off by a senior individual from the lead school/entity that will receive the grant on behalf of the partnership. This letter must be submitted alongside other documents. Please see *Part 3* for further information.

Provision of impact evaluation findings

As part of the programme, the department will require Grant Holders to conduct an impact evaluation on their partnership in accordance with *Appendix A to the*

specification (partnership proposal), and to share findings and data with the department to contribute to a programme-wide impact evaluation. Please refer to *Part 3* for further information on impact evaluation requirements.

The programme-wide impact evaluation (to be carried out by the department, informed by data from individual partnerships) will be designed to advance our knowledge of what works effectively in partnerships, based on the real-world experiences of Grant Holders in delivering their partnership activities. This will help us make evidence-based policy decisions in future. We plan to share our findings so that all schools are able to benefit from the evidence.

Part 2: Assessment and scoring

Assessment of bids

The department is committed to a bidding process that is open to all schools, higher education providers and other interested parties, and ensuring that it is carried out in a transparent, non-discriminatory and proportionate manner.

The assessment of bids will be led by a panel of officials from the department. We reserve the right to invite key experts from each sector to play an advisory role during the assessment process, subject to conflict of interest checks. This would be intended to provide a wide range of views about the strength and moderation of bids.

Bidders are required to submit certain documents (see *Part 1*) alongside their bid and failure to provide all required documents will generally result in a 'fail' judgement. Where 'fail' judgements are given, the bid will not be assessed further. Bids that 'pass' will be assessed against the weighted criteria as set out below.

Scoring of bids

Bids will be scored in accordance with *Table 5* against the four criteria of:

- Sustainability
- Impact
- Mutual benefit
- Tackling disadvantage

The *Bidding document* (document ref. 1) and *Appendix A to the specification* (document ref. 2) will provide the opportunity to produce evidence for how your partnership will meet each of the criteria.

Bidders will be given maximum flexibility in doing this, through either open-ended statements or a plan. The information requirements for addressing the criteria are shown in *Table 4* below.

Table 4: Information requirement to address criteria

Criteria	Evidence type	Document ref.
Sustainability	Open-ended statement	1A
Impact	Plan within partnership proposal	2C
Mutual benefit	Open-ended statement	1B
Tackling disadvantage	Open-ended statement	1C

Bidders will also be required to submit other information elements that will outline the partnership's objectives, proposed activities, and a purchase and spending plan, which will include a price break down for how grant is to be used, and where applicable, how match funding will be used to complement departmental funding (see *Part 3* for further information).

The questions and plans will be assessed according to a 6 point scale set out in *Table 6*. Please note that all information outlined is required for assessment to take

place; **bids that do not include all required information will generally receive a 'fail' judgement, irrespective of the strength of the information provided.**

All scoring elements will be assessed against the purpose for which that information is being sought. This is outlined in *Table 5* below.

Table 5: Full list of evidence/information required and scoring approach

Information requirement / document	Doc. ref.	Purpose	% of overall score	Scoring method
<i>Complete set of required documents</i>	All	<ul style="list-style-type: none"> To ensure that bids provide all required documents 	n/a	Pass if all information supplied Fail where document/s are missing or incomplete
<i>Signed declaration / provision of necessary further information as outlined under compliance</i>	n/a	<ul style="list-style-type: none"> Pass all mandatory criteria 	n/a	Pass if all mandatory criteria correctly supplied Fail where mandatory criteria not supplied or incorrect
Sustainability statement	1A	<ul style="list-style-type: none"> Gives confidence and evidence of sustainability of partnership beyond grant period 	10%	6 point scale
Mutual benefit statement	1B	<ul style="list-style-type: none"> Gives confidence that all schools and institutions will share the benefits of the partnership Gives confidence that appropriate governance arrangements are in place to ensure that all partners have a say in the direction of the partnership 	10%	6 point scale
Tackling disadvantage statement	1C	<ul style="list-style-type: none"> Outlines how the resources from this programme will be used to support pupils from disadvantaged backgrounds 	10%	6 point scale
Partnership objectives	2A	<ul style="list-style-type: none"> Outline the objectives of the partnership 	10%	6 point scale

		<ul style="list-style-type: none"> ▪ Give confidence that objectives are in line with criteria of sustainability, impact, mutual benefit, and tackling disadvantage ▪ Give confidence that objectives are specific, measurable, achievable, and realistic 		
Partnership activities	2B	<ul style="list-style-type: none"> ▪ Outline the activities that the partnership proposes to undertake ▪ Give confidence that activities are in line with criteria of sustainability, impact, mutual benefit, and tackling disadvantage ▪ Give confidence that the activities chosen will help the partnership to meet its objectives ▪ Outline which of the following four areas* activities fall into: <ul style="list-style-type: none"> ▪ Leadership and governance ▪ Teaching quality and capacity ▪ Curriculum development ▪ Other targeted school improvement activity 	30%	6 point scale
Impact evaluation plan	2C	<ul style="list-style-type: none"> ▪ Gives confidence that the appropriate methodology and data has been selected to evaluate the impact of activities in order to determine whether objectives have been met ▪ Gives confidence that benefits will be tracked over time and that the partnership will learn from experience ▪ Gives confidence that evaluation plan will fairly assess the impact of departmental funding 	15%	6 point scale
Purchase and spending plan	2D	<ul style="list-style-type: none"> ▪ Gives confidence that expenditure is proportionate and realistic, and that timelines are deliverable 	15%	6 point scale

		<ul style="list-style-type: none"> ▪ Provides evidence that spending plans support activities that will advance the objectives of the partnership ▪ Gives confidence that appropriate governance arrangements are in place to manage expenditure (both administratively and to aid decision making) 		
<u>Expansion grant bids only</u> : Letter confirming allocation of match funding	3	<ul style="list-style-type: none"> ▪ Serves as proof that match funding has either been received or is committed 	n/a	Pass if all mandatory information correctly supplied Fail where mandatory elements not supplied or incorrect

*the four areas were outlined in the government response to [Schools that work for everyone](#) (May 2018) and are also outlined in the Programme specification. Further information and examples of activities can be found in [Part 3](#).

As outlined in *Table 5* above, the scoring elements in the *Bid document* are worth 30%; *Appendix A to the specification (partnership proposal)* is worth 70%. The highest single scoring element is in relation partnership activities (document ref. 2B), which is worth 30%. **Please take the time to consider how the evidence you provide meets the purpose of each information requirement.**

6 point scale

The method of scoring responses will be based on a 6 point scale (0 to 5). Assessors from the department will use this to assign a score to each response. Assessors will use their own judgement and discretion when scoring responses. The individual scores from each assessor will then be moderated to ensure consistency across the programme. Moderated scores will be multiplied by the appropriate weighting to produce a total score for each question. Scores will be added together to determine a final score out of 100.

All bids will be treated fairly and assessed on merit only. Higher scores will be awarded when the evidence provided demonstrates an excellent understanding, and provides high confidence. Lower scores will be given when the evidence provided does not demonstrate understanding of the issues or questions, and/or provide confidence.

The Department reserves the right to reject any bid that scores a 2 or below on any individual question.

Table 6: Scoring of responses using the 6 point scale

Assessment	Marks	Criteria
Excellent	5	<p>A comprehensive response that answers the information requirement in full and that provides evidence to satisfy the purpose of the requirement with precision and credibility. Demonstrates comprehensive knowledge, experience, capability, resources and/or capacity to meet the requirement.</p> <p>Demonstrates an excellent understanding and provides a high level of confidence with no concerns or omissions identified.</p>
Good	4	<p>A good response that answers the question, addresses the key points and provides evidence to demonstrate that the bidder has the knowledge, experience, capability, resources and/or capacity to meet the requirement.</p> <p>Provides a good level of confidence. The response may include some minor concerns or omissions but are not considered to present a risk or have an impact on delivery.</p>
Minor Omissions	3	<p>The response answers the question but may not have fully addressed the key points or provided enough evidence to fully demonstrate that the bidder has the knowledge, experience, capability, resources and/or capacity to meet the requirement.</p> <p>Provides a satisfactory level of confidence. The response may include some concerns or omissions that are considered to present an element of risk or may have an impact on delivery, but can be reasonably managed or resolved.</p>
Major Omissions	2	<p>The response does not answer the question in full and fails to address all the key points or provide relevant evidence to demonstrate that the bidder has the knowledge, experience, capability, resources and/or capacity to meet the requirement.</p> <p>Demonstrates a lack of understanding or confidence in some areas. The response includes concerns or omissions that are considered to present a risk or would have an impact on delivery that may require significant intervention to manage or resolve.</p>

Unacceptable	1	<p>The response fails to answer the question, does not address the key points or provide evidence to demonstrate that the bidder has the required knowledge, experience, capability, resources and/or capacity to deliver. The requirement is unlikely to be met.</p> <p>Demonstrates a lack of understanding or confidence. The response includes significant concerns or omissions that are considered to represent an unacceptable level of risk and/or would have a detrimental impact on delivery.</p>
No Answer Provided	0	No answer provided (will generally lead to a 'fail' judgement for bid as a whole).

Example assessment

Table 7 below shows an example of how the scoring system works. In this example, we have used the maximum score that can be awarded for all scoring elements.

Table 7: Example assessment

Required information / document	Doc. ref.	Max score	Multiplier based on %	Max weighted score
Pass/fail requirements				
<i>(Complete set of required documents)</i>	All	Pass	n/a	Pass (bid proceeds)
<u>Expansion grant bids only:</u> Letter stating that match funding has been allocated	3	Pass	n/a	Pass (bid proceeds)
6 point scale				
Sustainability statement	1A	5	x 2	(5 x 2) = 10
Mutual benefit statement	1B	5	x 2	(5 x 2) = 10
Tackling disadvantage statement	1C	5	x 2	(5 x 2) = 10
Partnership objectives	2A	5	x 2	(5 x 2) = 10
Partnership activities	2B	5	x 6	(5 x 6) = 30
Impact evaluation plan	2C	5	x 3	(5 x 3) = 15
Purchase and spending plan	2D	5	x 3	(5 x 3) = 15
Total score				100

Funding limit disclaimer

We will actively consider all completed bids put forward. In the event that we receive a high volume of strong bids, the department will award the funding available in descending order, with highest scoring bids awarded first.

Part 3: Guidance for specific documents

Please note that on this guidance document and all other documents, scoring elements are labelled with a red box (**XX**), showing their corresponding document reference number.

Document 1: Bid document for cross-sector partnerships grant

Particulars > Details of partnership lead / main contact person

The partnership will need to nominate a lead or main contact person. In the event that we require clarification or further information concerning the bid, we will contact this person via the telephone or email details provided.

It is up to bidders to decide whether the same person signs the mandatory declaration at the end of *document 1*.

Particulars > Partnership details

Partnership name

Please give your partnership a name.

Lead school / institution / entity

Each partnership will need to nominate a lead school/institution or entity. This entity will receive the grant on behalf of the partnership as a whole, and will be responsible for ensuring that departmental funding is allocated according to *Appendix A of the specification (partnership proposal)*. For expansion grant, it will also be responsible for ensuring that match funding is allocated.

A lead school/institution or entity can be:

- A state-funded school/institution
- An independent school with the explicit support of one or more state-funded institutions (explicit support will be automatically assumed at the participation of at least one state-funded institution in the partnership)
- A partnership entity (e.g. community interest company, charitable trust) as long as the control sits with a state school

These requirements should not discourage other organisations from bidding, but rather, encourage state schools to take a lead during the process.

Other organisations (such as higher education providers, charities, or corporate entities) who wish to bid will need to name a lead school/institution or entity in compliance with the above information.

Schools / institutions in the partnership

Please provide details of each partner school/institution, including the name, address, postcode, and sector of each one. For the purposes of this programme, the sectors are defined as:

- State-funded schools (either central government or local authority-funded)

- Independent schools
- Higher education or further education institutions

Other organisations involved in the partnership

If third party organisations are involved in your partnership, such as local businesses, or corporate partners, please give details in the space provided.

You can provide as much detail as you think is necessary, such as: organisation name, address, and the nature of involvement (e.g. financial contributor).

Partnership programme

Grant category

There are two categories of grant available:

- Seed funding grant
- Expansion grant

Please refer to *Part 1* for further information.

Formalising partnership

Bidders must agree to formalise their partnership via a memorandum of understanding (MOU). We will also accept alternative formalising arrangements, such as service level agreements. For the purposes of this document, we will refer solely to MOUs.

Please note that you will not be required to produce an MOU at the bidding stage; you simply need to commit to formalising the partnership.

If you are in an existing partnership which has already been formalised, you may need to consider updating your MOU to reflect the expanded programme.

In general, bidders who do not indicate a commitment to formalising their partnership by ticking YES in the appropriate box will be given a 'fail' judgement. If you choose to tick NO, but believe you have a valid justification, please include it in the space provided.

In due course, your MOU will need to be signed off by a senior representative from each partner school / institution, such as a head teacher or chair of governors, head of widening participation or similar senior representative for higher education providers.

We recommend following published departmental guidance on formalising partnerships, found at: <https://www.gov.uk/government/publications/setting-up-school-partnerships>.

Statements against criteria

The department does not stipulate specific material that should or should not be included within each statement – it is entirely up to each bidder to outline how they meet the criteria. The text below is for advice only and is based on examples of good practice that the department is aware of through the System Partnerships Unit.

1A Sustainability statement

The purpose of the sustainability statement is to give confidence and provide evidence of sustainability beyond the grant period.

In essence, we are predominantly interested in three elements to sustainability:

- Support from senior leaders
- Sustainable financial resources
- Sustainable staff resources

Bids that are able to give confidence against these elements, are likely to score highly for this criteria.

Examples of how this can be evidenced can be seen in *Table 8* below. Please note that this is not an exhaustive list, and only intended as a guide unless stipulated below.

Table 8: Examples of evidence of sustainability

Support from senior leaders	<ul style="list-style-type: none">▪ A commitment to formalising a partnership with a MOU, signed off by senior leaders (requirement)▪ Ongoing commitment by senior leaders to sit on a partnership board
Sustainable financial resources	<ul style="list-style-type: none">▪ Match funding (requirement for Expansion grant)▪ Long-term commitment from partners to fund activities▪ Evidence of a sustainable model to fund activities, such as an affordable formula for spreading costs among all partners▪ Long-term involvement of financial contributors, such as corporate partners
Sustainable staff resources	<ul style="list-style-type: none">▪ Partnership leads at each partner school tasked with taking the work forward▪ Dedicated partnership co-ordinator working on behalf of all partner schools

1B Mutual benefit statement

The purpose of the mutual benefit statement is to give confidence that all schools and institutions are benefiting from, and contributing to the partnership. It must also

give confidence that appropriate governance arrangements are in place to ensure that all partners have a say in decision making and the direction of the partnership.

Mutual benefit does not mean that every school contributes in exactly the same way. Each partner school/institution is unique and is bound by its own circumstances, including size, scale of resources, capacity, and needs. For example:

- It is entirely possible that one school contributes financially, another contributes teaching resource, and another contributes curriculum materials; though the contributions are different, they are all helping to advance the partnership.
- A school that requires improvement may be a net beneficiary of partnership activities in the first instance, but commits to increasing its contribution as its circumstances improve.

Each school/institution is encouraged to contribute according to its individual strengths and what is sustainable. Mutual benefit is about the ethos that all partners have something to contribute, and will all benefit from the partnership.

In order to evidence your mutual benefit approach and ethos, you may wish to consider the following (noting that this is not an exhaustive list, and only intended as a guide):

- Outline the governance structure of the partnership, which demonstrates an equal say in decision making and direction-setting across all partners
- Outline any arrangements which demonstrate contributions from all partners
- Outline any plans to ensure that the capacity in one school may be targeted towards the need of another

1C *Tackling disadvantage statement*

The purpose of the tackling disadvantage statement is to give confidence that resources from this programme will be used to support pupils from disadvantaged backgrounds.

We are interested in understanding how partnerships plan to support pupils from disadvantaged backgrounds. Partnerships should therefore outline in their bids how they will maximise the participation of this specific group of children. This may mean (but not be limited to):

- Encouraging disadvantaged children to participate in specific subjects in which they are under-represented
- Developing a programme of activities tailored to children from disadvantaged backgrounds, for example, university preparation aimed at this group
- Developing a programme of activities that are likely to disproportionately support children from disadvantaged backgrounds, for example, after-school homework clubs

- Effect a blanket increase of children from disadvantaged backgrounds participating across all activities

Two common metrics that schools use to define disadvantage include free school meals and the pupil premium. It is up to each partnership to determine whether to use these, or alternative metrics.

To strengthen the evidence requirement we recommend setting measurable goals, which can be clearly substantiated in an impact evaluation. This should also appear in your impact evaluation plan (document ref. 2C).

Document 2: Appendix A to the specification (partnership proposal)

Appendix A to the specification (partnership proposal), is an important document that will clearly outline what your partnership intends to do, and how it will measure success. For successful bids, it will become the main document used by the department to evaluate delivery.

Whilst we do not impose a set level of detail required for each partnership proposal, we expect each to balance the need for sufficient information to allow a considered assessment at the bid stage, whilst being proportionate to the amount of grant being sought.

Bidders may either use the template document supplied (at the end of document 1), or submit a separate proposal in their own format. However, it must, as a minimum, be clearly labelled '*Appendix A to the specification (partnership proposal)*' and contain headings 2A to 2D, as outlined below (see *Table 5* for further information on scoring and assessment):

- 2A – Partnership objectives
- 2B – Partnership activities
- 2C – Impact evaluation plan
- 2D – Purchase and spending plan

It is up to each bidder to determine the quantity of information provided under each heading. As a general rule, we will require less detail for seed funding grant than for expansion grant bids. Any information provided in addition to 2A to 2D will be considered, but will not be scored.

2A Partnership objectives

In this part, please outline your partnership objectives – the outcomes that your partnership intends to achieve. It is up to each partnership to determine how many objectives it sets; this will be determined by your partnership's specific needs and opportunities, and what you judge to be sustainable.

Please note that no partnership will be marked down for having focused objectives; we would rather see schools with one or two achievable objectives than multiple ones which could stretch available resources too thinly.

Each objective should read as a clearly worded and brief mission statement that captures exactly what the partners hope to accomplish by working together. It should be concise enough to be reproduced on documents and materials related to the partnership in future, such as a memorandum of understanding (MOU).

The objectives are a vital part of the partnership that will ultimately allow partners to measure the impact and gauge whether it has been a success. When setting objectives, it may be helpful to consider the SMART approach (specific, measurable, achievable, realistic and time bound).

Example objectives, and how they relate to the partnership activities you choose to undertake can be seen in the following section (*2B – Partnership activities*).

2B Partnership activities

In this document, please specify the activities that your partnership will undertake. This is the highest single scoring element of the bid.

All cross-sector partnerships are encouraged to undertake activities that fall into at least one of the following areas:

- **Leadership and governance** – such as by taking an active role on the governing body or Trust Board of a school or academy, or providing senior support and strategic leadership.
- **Teaching quality and capacity** – participating in initiatives with national impact, such as training STEM or foreign language teachers, delivering joint CPD programmes, participating in Teaching School Alliances, sharing lesson plans and resources.
- **Curriculum development** – working with schools on curriculum design and delivery, such as by providing broader curriculum opportunities for pupils by seconding teachers, holding mixed classes on shortage subjects, or sharing lesson plans and other materials.
- **Other targeted school improvement activity** – facilitating direct support targeted at another school's specific needs. This is not limited to academic areas, but can also include working together on school finances, joint procurement, HR, or back office systems.

Please outline in your proposal which of these your activity/activities fall into.

The activities you choose to undertake will depend on your partnership's objectives. We encourage bidders to focus exclusively on activities that will help deliver the partnership's objectives. If an activity is unlikely to contribute to this, you should reconsider whether a different activity may be more appropriate. The table below gives non-exhaustive examples of activities, linked to objectives.

Table 9: Examples of activities and grant spend, linked to partnerships objectives

Example objectives	Example activities
Address local modern foreign language (MFL) teacher shortage in order to give pupils across the partnership access to language teaching	<ul style="list-style-type: none"> ▪ Second/share MFL teaching resource with schools that are struggling to recruit, or who do not have the resource to employ a language teacher full-time ▪ Hold mixed language classes, inviting pupils from across the partnership to joint lessons
Address skills shortages and knowledge gaps on governing boards	<ul style="list-style-type: none"> ▪ Identify leaders from across partner schools and develop a programme for matching talent to known knowledge or skills gaps
To encourage more girls to take an interest in science and technology subjects	<ul style="list-style-type: none"> ▪ Hold mixed science and/or technology classes, inviting girls from across the partnership to joint lessons ▪ Programme of speakers and/or specialist teaching staff to inspire next generation of students
Provide support for heads of department, drive out silo-working and ensure that best practice is shared	<ul style="list-style-type: none"> ▪ Targeted CPD programme ▪ Regular joint meetings of department heads to share ideas and find solutions to common concerns
Provide university and career transition advice to pupils to ensure all students are well prepared for the next stage in their education, training or employment	<ul style="list-style-type: none"> ▪ Hold mixed university preparation sessions. Second/share careers advisers. ▪ Jointly plan a careers advice programme
Widen the curriculum offer across partner schools, focusing on areas of need	<ul style="list-style-type: none"> ▪ Shared use of facilities (such as labs, studios, sports grounds) alongside tuition and teaching resource

Partnership activities – further points to consider

To ensure that your partnership is sustainable into the future, you should only consider undertaking activities that partners have the capacity to deliver. If there is not a realistic capacity or resources for an activity it should not be included.

Each school in a partnership is encouraged to contribute according to its own strengths and capacity. For example, a school with an exceptional maths or physics programme should consider using them for the benefit of the partnership.

All partnerships are encouraged to consider their local context. For example, if there is a local shortage of teachers or teaching capacity in a given subject, your

partnership may wish to consider the positive impact of directly addressing that specific need. Please see objectives in *Table 9* above for examples.

Where it is appropriate for your partnership, the local context, *and* there is an opportunity for alignment with departmental priority subjects, you may wish to consider undertaking activities where there is a need for more teachers or teaching capacity in a national context. *Table 10* below outlines the department's current priority subjects alongside other subjects that require support. Please note that your assessment scores will not be affected by the inclusion of these subjects in your bid; your bid will be assessed according to how it delivers against the criteria, not whether it undertakes activities in specific subjects; this is for information only.

Table 10: DfE priority subjects and other subjects for support in a national context

Priority subjects (national context)	<ul style="list-style-type: none"> ▪ Physics ▪ Maths ▪ Chemistry ▪ Computing ▪ Modern foreign languages ▪ Biology ▪ Classics
Other subjects for support (national context)	<ul style="list-style-type: none"> ▪ English ▪ Geography ▪ Design and technology ▪ History ▪ Religious education ▪ Music ▪ Art and design ▪ Business studies

Further information: [Get Into Teaching - Funding by subject](#)

2C Impact evaluation plan

The impact evaluation plan must give confidence that:

- The appropriate methodology and data has been selected to evaluate the impact of activities in order to determine whether objectives have been met
- Partnership benefits will be tracked over time and that the partnership will learn from experience
- The overall impact of the partnership will be fairly assessed, including the impact of departmental funding

As each partnership is unique, and there are significant variances in scale and activities undertaken, the department does not believe that a centrally-imposed evaluation framework would be appropriate. We are asking for an impact evaluation

plan in order to allow flexibility for partnerships to determine what they measure and how they will do it.

Your plan should include the metrics you will use, and the data you will collect, whether qualitative or quantitative. It should also specific targets, or Key Performance Indicators and associated remedies that you will use.

To give non-exhaustive examples of how this can be outlined in your plan, please see *Table 11* below. As can be seen, attributable outcomes and evaluation methods are linked directly to partnership objectives.

Table 11: Examples of attributable outcomes and evaluation methods, linked to objectives

Objective	Attributable outcome	Evaluation method
Address local MFL teacher shortage in order to give pupils across the partnership access to language teaching	<ul style="list-style-type: none"> ▪ X number of pupils from schools A, B and Z, which previously did not have an MFL teacher, are taught a foreign language 	<ul style="list-style-type: none"> ▪ Number of children attaining basic language qualification – rising to GCSE in 4 years (longitudinal research) ▪ Comparison to national or regional qualification averages and change over time (longitudinal research) ▪ Comparison to pre-partnership benchmark among partner schools (longitudinal research)
To encourage more girls to take an interest in science and technology subjects	<ul style="list-style-type: none"> ▪ Number of girls in science and technology subjects increases ▪ More girls gaining entry into science or technology-related university courses 	<ul style="list-style-type: none"> ▪ Percentage increase of girls in science and technology subjects across partner schools, compared to pre-partnership benchmark ▪ Student attitudes to STEM subjects (qualitative) ▪ Percentage increase of girls gaining entry into science or technology-related university courses (longitudinal research)
To improve attainment in maths	<ul style="list-style-type: none"> ▪ Improved test results at KS3 and KS4 maths 	<ul style="list-style-type: none"> ▪ Year on year comparison of results (percentage increase/decrease) ▪ Change over time, compared to pre-

		partnership benchmark (longitudinal research) <ul style="list-style-type: none"> ▪ Comparison to national or regional averages among a control group
To provide university and career transition advice to pupils to ensure all students are well prepared for the next stage in their education, training or employment	<ul style="list-style-type: none"> ▪ More pupils gaining entry into university ▪ More pupils remaining in education, training or finding employment 	<ul style="list-style-type: none"> ▪ Number of students gaining entry into university ▪ Year on year comparison (percentage increase/decrease) ▪ Student knowledge of options (qualitative) ▪ Student attitudes to further education or employment (qualitative)
Widen the curriculum offer across partner schools	<ul style="list-style-type: none"> ▪ Pupils given access to new subjects ▪ Access to specialist facilities (for example, arts and drama studios) leading to improved attainment or interest in subject 	<ul style="list-style-type: none"> ▪ Year on year comparison of subjects offered ▪ Number of and/or percentage increase in pupils taking new subjects ▪ Year on year comparison of results (e.g. for existing subjects taught in new facilities) ▪ Student attitudes (qualitative)

Impact evaluation plan – further points to consider

It is up to you to decide how much information to include in your plan. **The department understands the need to be proportionate to the amount of grant being sought**; as a general rule, top-line detail would be sufficient for seed funding grant, whilst expansion grant bids may wish to provide further evidence.

We recommend detailing the outputs of your impact evaluation; for example, it may take the form of a report detailing the partnership's success in meeting its stated objectives.

Your plan should outline any key dates or timelines associated with impact evaluation. In general, we think that it is appropriate to produce an impact evaluation annually/12 months from the date of commencement of activities. If appropriate, you may also wish to set secondary measurement points.

All Grant Holders must be willing to share their impact evaluation outputs with the department (or appointed third party) to inform future policy decisions and to allow us to share best practice based on what works effectively.

For further information, more detailed evaluation methods can be found in [The Magenta Book](#), produced by HM Treasury as guidance for evaluation. The Independent Schools Council has also produced an impact evaluation toolkit for schools.

2D Purchase and spending plan

Your purchase and spending plan should include all relevant information regarding purchase and spending decisions for the grant being sought, as well as proposed timelines for the expenditure. Expansion grant bids only will also need to detail how match funding will be used to complement departmental funding.

To satisfy the evidence requirements, your plan must:

- Must provide a cost breakdown of how any departmental funding will be allocated, including values per hour or per unit where applicable
- Expansion grant bids only must provide a cost breakdown of how any match funding will be allocated, including values per hour or per unit where applicable

The department reserves the right to reject a bid that does not reflect a fair and accurate representation of costing.

We understand that at this stage, bidders may only have a top-line plan, which broadly establishes firm cost expected spend. The department must be given confidence that the plan submitted at the bidding stage is realistic and deliverable. It is also vital that timelines are realistic, and that any expenditure is clearly linked to the activities and objectives of the partnership.

In order to ensure that plans are proportionate to the amount of grant being sought, as a general rule, **top-line detail would be sufficient for seed funding grant.**

Purchase and spending plan – further points to consider

In practical terms, you may wish to consider producing a gantt chart or table that clearly outlines the following as appropriate:

- Total spend/expenditure of each item/service on a separate line
- The partnership activity it relates to
- Proposed start date of spend
- Proposed end date of spend

It is also essential that plans contain details of governance arrangements relating to expenditure, including (but not necessarily limited to):

- How spending decisions will be taken
- Details of any oversight boards/meetings
- Named individual/s with responsibility for managing the grant

Document 3: Letter confirming allocation of match funding

Please note that document 3 is only a requirement for expansion grant bids

You will need to supply evidence that match funding has been allocated. This should be in the form of a letter that clearly explains the budget arrangements.

Letters must contain the following information as a minimum:

- Whether the funding has been received, or has been committed to
- What the source of funding is (e.g. whether from a contribution from all partner schools, or from an outside source such as local businesses)
- Any plans for future funding arrangements

The letter must be signed off by a senior individual from the lead school/institution or entity that will receive the grant on behalf of the partnership. This may include a school head, finance director, or accountant.

Part 4: Programme timelines

Timelines

Date	Action	Status
Fri 7 Jun	Grant announced	Completed
Wed 9 Oct	Bidding documents published	Completed
Wed 9 Oct	Bidding window opens	Completed
Fri 29 Nov	Bidding window closes	
Dec	Sifting and assessment of bids	
Jan 2020	Announcement of successful bids	
Late Jan/Feb 2020	Advanced planning and refinement meetings	
Mar or Apr 2020	First tranche paid	
May 2020	Second tranche paid	
Sep 2020	Third tranche paid	
Mar 2021	Fourth tranche paid	
Sep 2022	Fifth tranche payment (by partnership)	