DPS Schedule 6 (Order Form Template and Order Schedules)

Order Form

ORDER REFERENCE:	**24-25/018**
THE BUYER:	**The Department for Education**
BUYER ADDRESS	**Sanctuary Buildings, Great Smith Street, London, SW1P 3BT**
THE SUPPLIER:	CFE (Research & Consulting) Ltd
SUPPLIER ADDRESS:	Phoenix Yard, 5-9 Upper Brown Street, Leicester, LE1 5TE
REGISTRATION NUMBER:	03345012
DUNS NUMBER:	896795937

APPLICABLE DPS CONTRACT

This Order Form is for the provision of the Deliverables and dated 26th February 2025 It's issued under the DPS Contract with the reference number **RM6126 CCS Research & Insights Marketplace DPS** for the provision of **Further Education Targeted Retention Incentive Evaluation.**

DPS FILTER CATEGORY(IES):
Further Education, Mixed method (qualitative and quantitative), Impact evaluation, Experimental / quasi-experimental impact evaluation, Theory-based impact evaluation (incl. Theories of Change (ToC) and Logic Modelling), Evaluation scoping / evaluability assessment, Feasibility study, School support staff, Teaching, England

ORDER INCORPORATED TERMS

The following documents are incorporated into this Order Contract. Where numbers are missing we are not using those schedules. If the documents conflict, the following order of precedence applies:

1. This Order Form including the Order Special Terms and Order Special Schedules.
2. Joint Schedule 1(Definitions and Interpretation) **RM6126 CCS Research & Insights Marketplace DPS**

   DPS Joint Schedule 1 - Definitions v1.0.pdf
3. DPS Special Terms

4. The following Schedules in equal order of precedence:

   - Joint Schedules for **RM6126 CCS Research & Insights DPS**
     - [Joint Schedule 1 is covered in '2.' above, and *must* be included]
     - Joint Schedule 2 (Variation Form)

       DPS Joint Schedule 2 - Variation Form v.1.0
     - Joint Schedule 3 (Insurance Requirements)

       DPS Joint Schedule 3 - Insurance Requirem
     - Joint Schedule 4 (Commercially Sensitive Information)

       DPS Joint Schedule 4 - Commercially Sensit
     - [Joint Schedule 5 is covered in '6.' Below, and *must* be included]
     - [Joint Schedule 6 (Key Subcontractors)]

       DPS Joint Schedule 6 - Key Subcontractors
     - Joint Schedule 10 (Rectification Plan)

       DPS Joint Schedule 10 - Rectification Plan
     - Joint Schedule 11 (Processing Data)

       Joint Schedule 11 - Processing data.docx
   - Order Schedules for **24-25/018**
     - Order Schedule 1 (Transparency Reports)

       DPS Order Schedule 1 - Transparency Repo

- Order Schedule 2 (Staff Transfer)

  DPS Order Schedule
  2 - Staff Transfer v1.1

- Order Schedule 3 (Continuous Improvement)

  DPS Order Schedule
  3 - Continuous Impro

- [Order Schedule 4 (Order Tender)

  DfE_FETRI
  Evaluation_CFE NFER

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- [Order Schedule 5 (Pricing Details)]

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- [Order Schedule 7 (Key Supplier Staff)

  DPS Order Schedule
  7 - Key Supplier Staff]

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- [Order Schedule 9 (Security)]

  DPS Order Schedule
  9 - Security v1.1.docx

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- [Order Schedule 10 (Exit Management)]

  DPS Order Schedule
  10 - Exit Management

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- [Order Schedule 20 (Order Specification)]

  updated 250225 DPS
  Order Schedule 20 - S

5. CCS Core Terms (DPS version) v1.0.3

   RM6126 DPS Core
   Terms v1.0.pdf

6. Joint Schedule 5 (Corporate Social Responsibility)

   DPS Joint Schedule 5
   - Corporate Social Res

No other Supplier terms are part of the Order Contract. That includes any terms written on the back of, added to this Order Form, or presented at the time of delivery.

ORDER SPECIAL TERMS

The following Special Terms are incorporated into this Order Contract:

Special Term 1. Safeguarding Children and Vulnerable Adults

Special Term 2. Project outputs
Special Term 3. Departmental Security Standards for Business Services and ICT Contracts

Special Terms - Research updated Oct

ORDER START DATE: **[26th February 2025]**

ORDER EXPIRY DATE: **[31st January 2028]**

ORDER INITIAL PERIOD: **[2 years, 10 months]**

Break clauses will be implemented at the end of each financial year to account for spending review periods and if a full QED is not found to be feasible:

1) July 2025 (if QED not feasible, would reduce contract by 12 months)

[redacted]

DELIVERABLES
See details in Order Schedule 20 (Order Specification)]

MAXIMUM LIABILITY
The limitation of liability for this Order Contract is stated in Clause 11.2 of the Core Terms.

The Estimated Year 1 Charges used to calculate liability in the first Contract Year is [redacted]

ORDER CHARGES

Milestone	**Description**	**Invoice scheduled for**	**Cost**
1. Initial development and Planning	• Inception meeting • Desk-research (review of literature, management information and secondary data) • Initial scoping work for familiarisation interviews	31st March 2025	[redacted]
2. Evaluation plan with developed ToC and analysis of baseline surveys	• Remaining familiarisation interviews with range of stakeholders • Advisory group set up • Theory of Change development	31st May 2025	[redacted]

	• Evaluation plan - submitted and signed off by DfE • Analysis of baseline responses and headline findings		

3. QED feasibility study	• Explore the range of design options available, including:
	  ○ Outcome measures
	  ○ Data sources
	  ○ Counterfactuals and comparison groups
	  ○ Impact evaluation methods
	• Findings presentation
	• Findings report
		30th June 2025	[redacted]

BREAK CLAUSE 1: [redacted]			
4. Wave 1 Survey Fieldwork	• Communication strategy set-up (including flyers and data dashboard) • Questionnaire development • Online scripting and data processing • Administration • Sufficient number of survey responses received (10% response rate)	31st July 2025	[redacted]
5. Finalise full QED Study plan	• Full QED study plan - submitted and signed off by DfE	30th September 2025	[redacted]
6. Wave 1 Case Studies Fieldwork Wave 1 Interim presentation	• Case study sampling and topic guide development • Wave 1 of fieldwork conducted with 8 providers (10 interviews in each) • Interim presentation for theory-based evaluation • Analysis completed for surveys and case studies • Clear headline findings • Presentation to DfE	30th November 2025	[redacted]

BREAK CLAUSE 2: [redacted]			
7. Wave 2 Survey Fieldwork	• Questionnaire development and scripting • Input into DfE RAP follow up surveys • Administration • Sufficient number of survey responses received (10% response rate)	31st July 2026	[redacted]
8. Wave 2 Case Studies Fieldwork	• Case study sampling and topic guide development • Wave 2 of fieldwork conducted with 8 beneficiary providers (6 interviews in each) and 3 case studies in the non-statutory sector (3 interviews in each)	31st July 2026	[redacted]
9. Final theory-based report and outputs signed off, meeting DfE standards Full QED impact evaluation – analysis 24/25 AY data from FEWDC	• Stakeholder group to test ToC • Summary findings presentation to DfE and advisory group • Final theory-based evaluation reports meeting DfE standards signed-off • Impact statistical analysis • Quality checks • Interim findings presentation	31st December 2026	[redacted]
10. Full QED impact evaluation – analysis 25/26 AY data from FEWDC	• Impact statistical analysis (25/26 data) • Quality checks	31st October 2027	[redacted]
11. Final QED report and outputs signed off, meeting DfE standards	• A full audit trails of the code used, and outputs generated • Findings presentation • Findings report meeting DfE standards signed-off	31st December 2027	[redacted]
FINAL PHASE: [redacted]			

ORDER CHARGES
Expenditure for the financial year 2024-25 shall not exceed [redacted] exclusive of VAT.
Expenditure for the financial year 2025-26 shall not exceed [redacted] exclusive of VAT.
Expenditure for the financial year 2026-27 shall not exceed [redacted] exclusive of VAT.
Expenditure for the financial year 2027-28 shall not exceed [redacted] exclusive of VAT.

Total Project expenditure shall not exceed **£303,688.80** exclusive of VAT

REIMBURSABLE EXPENSES
None

PAYMENT METHOD
Via BACS upon submission of valid invoice

BUYER'S INVOICE ADDRESS:
Department for Education, Sanctuary Buildings, Great Smith Street, London SW1P 3BT
Invoices must be submitted in pdf format, state the Purchase Order number (provided separately to this form), and sent via email to AccountsPayable.OCR@education.gov.uk

BUYER'S AUTHORISED REPRESENTATIVE
[redacted]
Senior Social Researcher
[redacted]
DfE, Piccadilly Gate, Store Street, Manchester, M1 2WD

BUYER'S ENVIRONMENTAL POLICY
Department for Education Sustainability and Climate Change Strategy, 21 April 2022, available online at: Sustainability and climate change strategy - GOV.UK

BUYER'S SECURITY POLICY
Department for Education Personal Information Charter, available online at: https://www.gov.uk/government/organisations/department-for-education/about/personal-information-charter#co

SUPPLIER'S AUTHORISED REPRESENTATIVE
[redacted]

Managing Director
[redacted]
CFE Research, 5-9 Phoenix Yard, Upper Brown Street, Leicester, LE1 5TE

SUPPLIER'S CONTRACT MANAGER
[redacted]
Research Director
[redacted]
CFE Research, 5-9 Phoenix Yard, Upper Brown Street, Leicester, LE1 5TE

PROGRESS REPORT FREQUENCY
Monthly: Ahead of the first progress meeting of the month. Both the supplier and the DfE are willing to allow flexibility around the frequency of the reports to accommodate busy or quieter periods of the evaluation.

PROGRESS MEETING FREQUENCY
Biweekly: At least every two weeks (specific day can be amended where necessary). Weekly meetings will be implemented at the start of the project and during peak project times. These meetings will be accompanied by a brief written project update. Both the supplier and the DfE are willing to allow flexibility around the frequency of meetings to accommodate busy or quieter periods of the evaluation.

KEY STAFF
SEE DPS Order Schedule 7

KEY SUBCONTRACTOR(S)
National Foundation for Educational Research (NFER)
The Mere, Upton Park, Slough, Berkshire, SL1 2DQ

E-AUCTIONS
[Not applicable]

COMMERCIALLY SENSITIVE INFORMATION
See 'DPS Joint Schedule 4'

SERVICE CREDITS
[Not applicable]

ADDITIONAL INSURANCES
[Not applicable]

GUARANTEE
[Not applicable]

SOCIAL VALUE COMMITMENT
The Supplier agrees, in providing the Deliverables and performing its obligations under the Order Contract, that it will comply with the social value commitments in Order Schedule 4 (Order Tender)]

For and on behalf of the Supplier:		**For and on behalf of the Buyer:**	
Signature:		Signature:	
Name:		Name:	
Role:		Role:	
Date:		Date:	

Order Schedule 20 (Order Specification)

This Schedule sets out the characteristics of the Deliverables that the Supplier will be required to make to the Buyers under this Order Contract. This should be read in conjunction with the following documents

Pack for Call-off Competition

Attachment 3 – Statement of Requirements

Title: **Further Education Targeted Retention Incentive Evaluation**

Contract Reference: **24-25/018**

FURTHER COMPETITION FROM THE CROWN COMMERICAL SERVICE RM6126 RESEARCH & INSIGHTS DYNAMIC PURCHASING SYSTEM (DPS)

1. Purpose

1.1. The Department for Education referred to as 'the Authority' hereafter is looking for a supplier to provide an evaluation of the Further Education Targeted Retention Incentive. This will include a theory-based evaluation and a feasibility study to explore whether there are options to progress a quasi-experimental impact evaluation of the Targeted Retention Incentive.

2. Background to the Contracting Authority

2.1. This research is being commissioned by the Further Education Workforce Division alongside analysts from the Skills Policy Analysis Division.

3. Definitions

Expression or Acronym	Definition
FE	Further Education
TRI	Targeted Retention Incentive
FEWDC	Further Education Workforce Data Collection
DfE	Department for Education
STEM	Science, Technology, Engineering and Mathematics
GFEC	General Further Education College
SFC	Sixth Form Colleges
HR	Human Resources
SLT	Senior Leadership Team
QED	Quasi-experimental Design
MI	Management Information

4. Summary

4.1. The Department for Education is looking for a supplier to conduct an evaluation of the Targeted Retention Incentive in Further Education. This will include a theory-based evaluation and a feasibility study to identify options to progress a quasi-experimental impact evaluation of the Targeted Retention Incentive. The bidder should include a proposal for the full impact evaluation; a break clause will be implemented to account for if a feasibility study finds that is not possible.

4.2. The Further Education Targeted Retention Incentive provides **incentive payments to early career teachers in key STEM and technical subjects** aiming to improve teacher retention. The expansion of the TRI to include FE teachers was announced in late 2023 and FE teachers can claim the payment from October 2024. As this is a new policy for FE, the DfE needs to find out the impact of the incentive on the FE workforce.

4.4. The impact evaluation will explore the impact of the incentive on the FE workforce, primarily on FE teacher retention, but also recruitment. The theory-based evaluation will aim to understand the underlying theories or logic that are driving improvements to teacher retention, recruitment and quality of provision.

4.5. The customer for the research is the Department for Education and we expect findings to be of interest to other government departments.

5. Background to the Requirement

5.1. The Further Education Targeted Retention Incentive (TRI) provides payments worth up to £6K p.a. after tax, for early career teachers in key STEM and technical subjects, from October 2024.

5.2. The payment is only available for FE teachers who teach mainly 16-19, work and teach in the statutory FE sector and who are in their first 5 years of teaching. This sector comprises mainly of general further education colleges (GFECs) and sixth form colleges (SFCs). FE teachers who teach these subjects in the non-statutory sector (i.e. independent training providers) will not be eligible for the TRI payment.

5.3. The payments are weighted for disadvantage. Full time teachers will receive between £4,000- £6,000. The highest value payments will be made to FE teachers who work in providers with the greatest proportion of disadvantaged learners (determined by the disadvantage funding providers receive), the vast majority of teachers will receive £6,000.

5.4. The policy intends to reach an estimated 5,000 FE teachers in each year of its delivery.

5.5. As this policy has had a blanket roll out to all those eligible, a quantitative, quasi-experimental approach to impact evaluation will be required to establish causal impact of the TRI. To identify robust options for a counterfactual, a feasibility study will be commissioned. The DfE has conducted preliminary analysis and has identified three potential comparator options which will need further investigation by the supplier. The feasibility study should also establish any further data collection that may be required to deliver a robust impact evaluation.

5.6. A theory-based evaluation will seek to understand the barriers and enablers of the TRI, particularly in understanding the conditions conducive to success. This will seek to explore where variation in impacts emerge, how, why and for whom.

6. The Requirement

6.1. The primary aim of the evaluation will be to capture robust impact evidence of the TRI programme in shaping retention outcomes.

6.2. Secondary research aims include exploring the impact of the TRI on FE teacher recruitment and teaching quality, and to build evidence on the barriers and enablers of TRI exploring where variances in impact emerge.

6.3. Research Questions

QED Research Questions

Primary Research Questions:

1. What is the impact of TRI on FE teacher attrition/drop out?

Secondary Research Questions:

2. What is the impact of TRI on FE teacher recruitment?
3. Can changes in FE teacher quality be robustly measured?

Theory Based Evaluation Primary Research Questions

Primary:

1. To what extent has the TRI contributed to the outcomes identified in the theory of change, and what are the mechanisms underpinning this?
2. To what extent does evidence (both existing and collected through the evaluation) support the theory of change?

Secondary:

1. How do contextual factors e.g. participant demographic, socio-economic status, and institutional practice / culture affect these outcomes?
2. What lessons can be drawn from variations in different programme outcomes across different contexts?
3. Has the TRI led to perception of increased quality in provision among the statutory providers who employ teachers? (e.g. reduced disruption, increase in provision, fewer use of agency staff, reduction of associated HR costs, etc)

6.4. Target Participant Group

The evaluation will aim to understand the impact of the TRI on the two groups of beneficiaries of the programme (FE teachers in receipt of TRI, and the FE providers who employ TRI recipients):

Target Participant Group	Estimated total population
16-19 FE teachers who teach STEM and technical subjects, in the statutory sector	Population size = c.5000 TRI recipients
Senior Leaders	Total population size = c.280 providers in the statutory sector.
HR Leads	Total population size = c.280 providers in the statutory sector.

6.5. An anonymised list of FE teachers who claim the TRI payment will be provided to the successful bidder to allow recruitment to the study.

6.6. HR/SLT leads can be accessed using the programme management information (MI) collected as part of the claim process.

6.7. A data sharing agreement will need to be in place to between the DfE and the supplier to be able to share more detailed teacher level data (the programme MI from the TRI platform) and provider level data (FE Workforce data collection).

6.8 Fieldwork

Bidders should clearly outline their fieldwork plans and their rationale behind these. As well as detailing proposed sample sizes for each aspect of the fieldwork, bidders should also detail methodologies for each research stage. Bidders should outline their expected timeframes for each aspect of the fieldwork and their rationale for this. Bidders should consider our proposed timescales, and any fieldwork risks, when drafting plans for fieldwork. Any risks to fieldwork should be considered in the risk management section.

6.9 Response rates

Suggestions from bidders on how they will ensure sufficient participation in the research to meet the needs of the research should be outlined in their tender, along with how they will ensure accessibility of taking part in the research. At a minimum, we would expect a series of reminders (by text, email, post etc.) to be sent to providers/teachers participating in the research, but we welcome innovative ways to engage the FE sector, particularly as previous projects have suffered with low response rates from FE teachers. We would also like bidders to suggest ways to improve the accessibility of participating in the research for our participant groups. While incentives are not generally encouraged as part of DfE research, we are conscious incentives may be necessary, particularly for teachers/providers who have not received the TRI payment. The use and cost of incentives should be proposed in the bid and met within the stated budget for this project, if the bidder feels that they are necessary. Additional budget for incentives will not be available at a later stage if recruitment becomes difficult. We expect bidders to meet their recruitment targets suggested in their proposal.

7. Suggested approach and analysis

We propose conducting a quasi-experimental impact evaluation and theory-based evaluation to answer the key research questions.

7.1 Quasi-experimental impact evaluation

Bidders should include a feasibility study for the QED in their proposal. A feasibility study will be needed to identify options for a counterfactual - including three options identified by DfE and any others - and what further data collection is required to deliver a robust impact evaluation. The feasibility study should be solution oriented; it should aim to work out the best way to conduct a QED rather than just assessing whether it can be done. However, a break clause will be implemented to account for if a feasibility study finds that a full impact evaluation is not possible.

7.11 Review of data and literature

The feasibility study would involve a full review of the TRI for the purposes of an impact evaluation, including a review of the baseline data and literature (including school literature). We don't expect the literature review to be a large exercise given the limited literature available on the FE sector (though more is likely to be available from the schools sector). The insights will draw together the pre-intervention landscape in FE, and numbers of vacancies prior to the implementation of the TRI programme by subject, region and provider type.

7.12 Population

Eligible FE teachers can apply for the first round of TRI payments from October 2024 until March 2025. Eligible FE teachers include following subject areas: building and construction, chemistry, computing, including digital and ICT, early years, engineering and manufacturing, including transport engineering and electronics, maths and physics. Teachers must be in their first five years to claim. The TRI payment ranges from £2,000 to £6,000, depending on: the provider they teach at and the number of hours they teach. If they teach at an FE provider that has higher levels of disadvantage, they will receive a higher payment. This is based on the proportion of 16 to 19 students who attract disadvantage funding. The vast majority of teachers will receive the £6,000. Only statutory FE providers are eligible for the funding: FE colleges, sixth-form colleges, designated institutions and 16- to 19-only academies and schools.

7.13 Comparison groups

Analysis of existing data will be needed to identify a suitable comparison group for the impact evaluation. To date, we have identified three possible comparison groups as part of our initial feasibility assessment:

1. Non statutory sector (i.e. Independent Training Providers) – teachers in this sector will not be eligible for TRI payments, but these teachers still teach FE and thus have some similarities with teachers in statutory colleges.
2. FE colleges in Wales – the TRI is paid in England only so Welsh FE teachers won't be eligible for the TRI payments.
3. Subjects which are similar to TRI subjects – either pedagogically, or in terms of pay, teacher characteristics and vacancy rates.

From our initial exploration, we expect that a comparator group using FE teachers teaching the same subjects in the non-statutory sector offers the most promise. However, we expect the proposal to include an in-depth exploration of all three options above along with identifying any other options using the latest available data, from the FEWDC, to fully test which approach, if any, will be feasible.

7.14 Data

We have already identified some potential sources of existing data for the impact evaluation. These data sources have different levels of coverage of the FE workforce. These include:

The FE Workforce Data Collection:

- Annual published statistics showing vacancies, number of FE teachers by subject, demographic data of the FE Workforce, age, salary, FTE, main subject taught, highest qualification taught, highest qualification studied and UKPRN of the provider they teach at.
- The first set of data was collected for the 2021-2022 academic year.
- DfE can work with the successful supplier to grant access to the data needed from the FEWDC.

The TRI Claim Platform:

- Collects programme management information that will provide more details on the TRI participants.
- This includes: participant demographic data, name, d.o.b., number of years teaching in FE, name of provider, main subject taught, age, salary.
- This MI data can be linked to FEWDC by DfE before supplying to the successful supplier.

Baseline DfE in-house surveys:

- To support the progress of the feasibility study and ensure both primary impacts (retention) and secondary impacts (recruitment and quality of provision) are observed, we have issued two baseline surveys to ensure that any management information data gaps are fulfilled.
- Given the timing of the roll out, three baseline surveys were issued by the DfE in September 2024: **TRI participant survey,** a separate **teacher survey targeting the non-statutory sector**, which covers job satisfaction, morale, career aspirations of teaching in FE and can be used as a baseline, and a **survey to HR/SLT** in the non-statutory sector. A data sharing agreement will need to be in place to share this data with the successful bidder.

Year One DfE in-house surveys:

- To capture views from HR/SLT and teachers from the non-statutory sector, DfE will issue two surveys one year into the evaluation (Spring 2026). This survey will be delivered through the DfE Regions and Providers (RAP) survey and will build on the baseline survey.

- DfE will design and administer the survey but we welcome suppliers input into the design of the survey. The data will then be shared with supplier to incorporate into the final theory-based evaluation report.

7.15 Methodology

7.15.1 Feasibility Study

We expect the successful supplier to work with the Programme MI, baseline data and future rounds of the FEWDC to take forward our initial scoping proposals and provide a more in-depth QED feasibility paper. This includes testing of matching design, pre and post, and difference in difference methods using statutory and non-statutory and/or Welsh data. We are open to other, innovative approaches from bidders. There should also be consideration of whether it is possible and worthwhile to test for the impact of the varying incentive payments weighted for disadvantage in the impact model.

The study would propose a suitable approach for measuring impact of TRI on the FE workforce, if feasible. If feasible, any approaches outlined should include:

- Establishing an appropriate counterfactual;
- Any new data collection required and/or use of existing data sources (including an appropriate sampling frame);
- Timescales.

It will be important for the feasibility study to outline the pros and cons of different methodologies and in particular what counterfactuals could be used for each approach.

For each approach, we are keen to understand what could be achieved with existing data, and what additional data collection would be required, including the cost of any additional data collection and the feasibility of collecting this in a robust way. This should include assessments of both learner and provider level data.

7.15.2 Full QED

The impact model will be designed and tested by the successful supplier. The appropriate comparator group and methodological design will be drawn from the QED impact feasibility exploration. A first cut of the impact methodology will be delivered at the end of Year 2 using all available data (autumn 2026). Due to the retrospective nature of the FEWDC we expect the final impact model being delivered to the DfE c.1 year after the TRI programmes' conclusion upon the collation of FEWDC data (i.e. around summer 2027).

We encourage bidders to consider how they would link together the QED and theory-based elements of the evaluation in the final report.

7.2 Theory-based impact evaluation

We have proposed including a theory-based impact evaluation alongside the feasibility study. This is likely to provide evidence sooner than a QED and help to uncover the mechanisms of change within the programme logic, exploring ‘who’ ‘where’ ‘how’ and ‘why. We are open to suppliers proposals on the most appropriate theory-based methods, although we are particularly interested in using contribution analysis to understand the contribution of the incentive on FE teacher retention and recruitment, assessing whether any existing and additional evidence is consistent with the theory of change. We are proposing a combination of surveys, and case study interviews for the theory-based evaluation. We are proposing to conduct two surveys in-house (outlined in the data section above) to target the non-statutory FE sector. However, we would also welcome innovative ideas for exploring the evaluation questions. In line with best practice, we would expect bidders to outline how they would test and assess (e.g. using a Delphi exercise, stakeholder workshops).

7.21 Surveys

We propose new surveys of the intervention group; the key beneficiaries of TRI, teachers claiming TRI and statutory FE providers, SLT and HR leads. The surveys would be largely quantitative, to allow for quick dissemination and sharing of results, but could also capture initial qualitative insights which could be explored further through the case studies (see below). The surveys would be completed online and would be expected to take between 15-30 minutes. They will provide a wider snapshot of the TRI programme, awareness of it, and emerging perceptions of impact among these beneficiaries.

We propose conducting two waves of surveys (one per year) to improve data quality and to capture any changes in opinion of the retention payment. As well as aggregated findings we would expect the supplier to explore characteristic differences in response e.g., by geographic region, type of provider. Contact details for the two populations (FE teachers and providers) can be accessed via the programme MI, but we are interested in bidders' ideas for sampling to reduce burden on the sector and target representative groups.

DfE will issue two surveys (as referenced above), one year into the evaluation (Spring 2026), to capture views from a comparison group (non-statutory sector). This survey will be delivered through the DfE Regions and Providers (RAP) survey and will build on the baseline survey. DfE will design and administer the survey but we welcome suppliers input into the design of the survey. The data will then be shared with supplier to incorporate into the final theory-based evaluation report.

7.22 Case Studies

We propose the completion of 11 case studies over two years, with both TRI providers (8) and non-statutory providers (3). We propose two waves of the TRI provider case studies (one per year) to track the same provider, building a longitudinal view of the TRI programme and its effects. Within each case study we would propose that 2 in-depth interviews with HR / SLT and 2 interviews with FE teachers are included. However, we welcome ideas for innovative methods as part of the case studies, and innovative approaches to encourage participation and reduce attrition. The case studies would explore the theory-based research questions in greater detail. The sample should include a range of providers (ie different geographic areas and types of institution). For the TRI case studies, the sample would be drawn from the programme MI data base. For the non-TRI providers, we will seek to identify potential providers through the baseline internal DfE surveys. Providers who deliver the most TRI subjects will be targeted for this case study research.

8. Research Outputs

We expect the following services at a minimum from a successful bidder. These will likely be adapted based on the bidder’s chosen methodology. The customer for the evaluation will be the Department for Education. The evaluation is also likely to be of interest to the Evaluation Task Force in the Cabinet Office and HM Treasury.

8.1. QED Feasibility Study

- Defining a robust methodology for the QED feasibility study
- Undertaking a desk review of the TRI policy, including all documentation, aims of the programme, previous rounds of the FEWDC and evidence from the schools TRI. Familiarisation interviews with DfE officials could be undertaken if deemed necessary.
- Agreeing any data collection and data sharing arrangements with DfE and any other parties if necessary to the feasibility study.
- Outlining any data collection or use of existing data sources for an impact evaluation, if applicable.
- Matching and cleaning of datasets if applicable.
- Advising on any weighting necessary to ensure a robust comparison group if applicable.
- Giving regular updates to DfE project manager and raising any issues in good time to aid resolutions.
- Delivery of a draft and final feasibility report and final presentation to DfE with two rounds of comments on the report and final sign off from DfE. The report will outline a suitable approach for measuring impact, if feasible. The structure of the report should be agreed with the DfE before the first draft is produced.
- The final report should be written of the highest quality and fully quality assured by the contractors. The report will need sufficient time for the Department to comment on before it can be finalised. It should be written with the Department’s approved research report template and meet all accessibility requirements. The final report will be published by DfE.

8.2. Full QED (if feasible)

- Defining a robust methodology for the impact evaluation.
- Delivery of a study plan for the impact evaluation.
- Defining the data collection required for the impact evaluation.
- Agreeing data collection and data sharing arrangements with DfE and any other parties e.g., institutions.
- Calculation of sample sizes and Minimum Detectable Effect Sizes (MDES).
- Drawing up of intervention and comparison groups (if possible)
- Data collection if applicable
- Undertaking any weighting necessary to ensure a robust comparison group if applicable.
- Giving regular updates to DfE project manager and raising any issues in good time to aid resolutions.
- Interim impact findings presentation.
- Delivery of a draft and final impact report and presentation to DfE with two rounds of comments on the report and final sign off from DfE. The structure of the report should be agreed with the DfE before the first draft is produced.
- The final report should be of the highest quality and fully quality assured by the contractors, finalised with the Department, and written with the Department's approved research report template and meet all accessibility requirements. The final report will be published by DfE.

8.3 Theory-based evaluation

- Defining a robust methodology for the theory-based evaluation.
- Delivery of a study plan for the theory-based evaluation.
- Defining the data collection required for the theory-based evaluation.
- Design and delivery of two surveys to TRI teachers.
- Design and delivery of two surveys to TRI SLT / HR leads
- Design and delivery of c11 case studies with TRI and non-TRI providers, including in-depth interviews.
- Combine data from the DfE in-house surveys (RAP survey) into final report.
- Flexibility to incorporate a small number of new research questions within the surveys to pick up new and emerging issues without additional costs.
- Production of interim summary presentation and report, including survey findings and case study findings from wave 1.
- Production of a draft and final theory-based report and presentation with two rounds of comments on the report and final sign off from DfE. The structure of the report should be agreed with the DfE before the first draft is produced.
- Regular updates to DfE project manager and raising of any issues in good time to aid resolutions, for example delivery of surveys, case studies and analysis.
- The final report should be of the highest quality and fully quality assured by the contractors, finalised with the Department, and written with the Department's approved research report template and meet all accessibility requirements. The final report will be published by DfE.

8.4 Research Outputs

8.41 We will require the following outputs from the successful bidder:

- Regular updates and short reports of emerging findings throughout the study.
- Sign off of research products with DfE e.g., survey and interview scripts, study plan, recruitment documents, reports. Payment points will be reliant on successful delivery of outputs and fieldwork.
- Detailed study plan for theory-based evaluation (and impact evaluation if feasible).
- Interim theory-based evaluation presentations, one focusing on survey findings (TRI and HR/SLT) and one on case study findings.
- Interim QED impact evaluation presentation.
- Draft and final evaluation reports for the theory-based evaluation, feasibility study and impact evaluation (if feasible).
- All datasets produced as part of the study to be provided to the Department. Technical reports, analysis reports, and supporting documentation should be provided for the datasets.
- All reports to be written by the contractors, finalised with the Department, and written with the Department's approved research report template and meet all accessibility requirements.

8.5 Bidders should provide evidence of producing such reports to a high standard for evaluation studies or other research projects with complex study designs.

9. Liaison Requirements

9.1 Liaison Arrangements

The evaluator will be required to work closely with the project manager in the Skills Policy Analysis Division within the Department for Education. This analytical team supports the Further Education Workforce Division. An initial inception meeting after contract award will take place between the evaluator, members of the Skills Policy Analysis Division and relevant policy colleagues from the FE Workforce Division. The successful contractor will be expected to be available for meetings as required to deliver the study requirements set out in the contract. Regular meeting arrangements will be agreed between the Department and the contractor after a contract is signed. Although the need for regular meetings will vary with the stage of the project, bidders should cost for fortnightly meetings during peak times with a smaller number of policy and research officials. Members will be given the opportunity to ask questions, comment on and agree fieldwork documents and draft reports. Regular email updates in between meetings will be required. The Department will have the final decision on any survey content and interview scripts. The Department's project manager will arrange and chair meetings at one of DfE's sites or remotely. Day to day management will be the responsibility of the Department's project manager.

9.2 Contractor Project Management

The contractor should name an experienced lead researcher who will take overall responsibility for directing the work and liaising with the Department for the course of this project. This lead researcher should only be replaced with the Department's agreement and any replacement will need to be a researcher of similar status and experience. All other researchers who are proposed for work on the study should also be named in bids and the daily rates of each grade of research staff specified. The relevant policy and methodological experience and areas of expertise of staff should also be detailed. Where a bid proposes a consortium between two or more research organisations, the key research managers should be named for all service institutions and one of those nominated as the lead manager.

9.3 Experience and qualifications of proposed research team

Tenders should include details of all relevant experience held by each member of the proposed research team, including CVs. These should be no more than 500 words per team member

10. Key Milestones and Deliverables

Please note that all timescales (procurement and project) are estimated and subject to change. Final timelines will be arranged with the successful bidder.

10.1. Procurement timescales

These timelines are provisional and subject to change.

DATE	ACTIVITY
04 11 2024	Launch of Procurement
22 11 2024	Clarification period closes ("Bid Clarification Deadline")
29 11 2024	Deadline for the publication of responses to Clarification questions
06 01 2025	Deadline for submission of Bid ("Bid Submission Deadline")

06 01 2025	Commencement of Evaluation Process
20 01 2025	Proposed Award Notification Date
10 02 2025	Expected execution (signature) date for Contract
17 02 2025	Expected commencement date for Contract

A project set-up meeting is scheduled for February 2025. We require the research to be complete and reported by December 2027 (if impact evaluation is feasible).

10.2. Project Timescales

Exact orderings and timings of tasks are tentative and to be finalised with the contractor. Bidders should outline how they would meet these timescales in their tender. If there are issues in meeting these timescales, these should be clearly justified.

Milestone	Delivery Date or Timeframe
Data collection and data sharing discussions and agreements put in place between DfE and successful supplier	March 2025
Data and Literature Review	March 2025
Study plan for QED and theory-based evaluation	March 2025
QED Feasibility	February – April 2025
QED Feasibility Presentation	April 2025
Draft QED Feasibility Report	May 2025
Final QED Feasibility Report	June 2025
Fieldwork for teachers/providers survey (wave 1)	April – June 2025
TRI Case study fieldwork (wave 1)	May – July 2025
Non-TRI Case study fieldwork	June - July 2025
Interim theory-based evaluation summary presentation & report (wave 1)	August 2025
Fieldwork for teachers/providers survey (wave 2)	April – June 2026

TRI Case study fieldwork (wave 2)	May – July 2026
RAP survey analysis and reporting	June 2026
Interim QED evaluation presentation (if feasible)	January 2026
Draft theory-based evaluation final report for review	October 2026
Final theory-based report	December 2026
Draft QED evaluation report	September 2027
Final QED evaluation report	December 2027

11. Budget

11.1. The budget for this project, including expenses and any respondent incentive payments is £305,000 (excluding VAT). A detailed breakdown of costs is required within **Attachment 4 Price Schedule** as per the instructions set out in **Attachment 2 Instructions to Bidders.**

12. Format of Proposal

12.1. Your written proposal should clearly demonstrate how you will deliver the requirements, including whether the services will be delivered solely by your 'in-house' capability or whether you intend to Sub-Contract any element(s) of the Services delivering the proposal. Details of sub-contractors should also be provided as part of your response to Qualification Criteria 4 – Further Information within **Attachment 2 Instructions to Bidders**.

Your proposal should be in the following format:

- **Format:** Microsoft Word or PDF
- **Font:** Min. font size 12
- **Page Limit:** outlined for each section below.

Your proposal should contain the following:

- **Section 1:** Table of Contents - not included in word count.
- **Section 2:** Summary of Proposal.
- **Section 3:** Meeting the Requirement:
  - Aims and Objectives – maximum 2000 words
  - Methodological approach and analysis [TE3]– maximum 6000 words
  - Reporting and outputs [TEC2]– maximum 3000 words
  - Project Management and Monitoring [TEC2]– maximum 3000 words

  - Staffing [TE1]– maximum 500 words per team member CV
  - Timescales [TEC2] – maximum 200 words
- **Section 4:** Risk Management [TEC2] (Including Risk Register). (further details given in 'Proposal Requirements – Section 4: Risk Management' below).
- **Section 5:** Data Security Consideration and Arrangements.
- **Section 6:** References and Expertise
- **Section 7:** Social Value Theme – as detailed in TEC4 in '6. Technical Evaluation Criteria' of 'Attachment 2 Instructions to bidders'

12.2 Proposal Requirements – Section 4: Risk Management

12.3 You should submit as part of your proposal a one-page summary on what you believe will be the key risks to delivering the project and what contingencies you will put in place to deal with them.

12.4. A risk is any factor that may delay, disrupt, or prevent the full achievement of a project objective. All risks should be identified. For each risk, the one-page summary should assess its likelihood (high, medium, or low) and specify its possible impact on the project objectives (again rated high, medium, or low). The assessment should also identify appropriate actions that would reduce or eliminate each risk or its impact.

12.5. Typical areas of risk for a research project might include staffing, resource constraints, technical constraints, data access, timing, management, and operational issues, but this is not an exhaustive list.

12.6. Additional Proposal Requirements – Dependencies

You should indicate in your proposal if you are reliant on any third party for the access of information, data or undertaking any of the work. This should be considered in addition to your requirement to outline formal sub-contracting arrangements within your response.

12.7. Additional Proposal Requirements – Monitoring Techniques

You should indicate in your proposal how you will monitor the project to ensure it is delivered in terms of quality, timeliness, and cost.

12.8. Additional Proposal Requirements – The Use of Incentives

12.9. With some important exceptions, the Authority believes that the routine use of respondent incentives in surveys is, in general, not justified as they are rarely cost effective in either increasing participation or reducing non-response biases. If you are proposing the use of respondent incentives in your proposal you must set out why you feel they are necessary, why it is not possible to achieve the required sample sizes or response rates without the use of incentives, how and to what extent they will raise the overall response rate, how you will mitigate any specific biases that could be introduced, and provide a cost comparison with non-incentive methods. Your arguments should be supported by empirical evidence from past use.

12.10 The exceptions to this are payment for participation in group discussions or in-depth qualitative interviews, payment to cover respondent expenses e.g., travel and childcare costs, and compensation for excessive demand on respondents, e.g., taking basic skills tests, diary keeping, panel maintenance and compensating providers for the respondent's time. If you wish to use a prize draw incentive then you must also set out in your proposal how you will comply with all relevant legislation and codes of practice (e.g.,' the British Code of Advertising and Sales Promotion), state that you shall be solely liable for any breach of these and that you shall indemnify the Authority against any claims that may be made under them.

13. Continuous Improvement

The successful supplier shall maintain open channels of communication with the Authority to resolve issues, share lessons learned and present new ways of working during project review meetings. Any proposed new ways of delivering the Services shall be brought to the Authority's attention and formally agreed prior to any changes being implemented.

14. Social Value and Sustainability

14.1. All government procurements must now assign at least 10% weighting of award criteria to specified social value/sustainability criteria as per Cabinet Office Procurement Policy Note 06/20.

14.2. For this procurement, our social value criteria is Wellbeing – Improve Community Integration.

14.3. As part of this criteria, we require bidders to put forward a clear plan for collaboration with FE institutions and teachers in the codesign and delivery of the research.

14.4. We are also asking for a clear strategy in ensuring the wellbeing of researchers and participants. Strong safeguarding policies and referral routes for participants (for example phone numbers for wellbeing services or charities) are essential, as is a duty of care for research staff undertaking fieldwork that could be distressing (for example access to wellbeing and mindfulness resources as well as adequate breaks between interviews).

15. Price

Prices are to be submitted *only* within **Attachment 4 Price Schedule** as per the instructions set out in **Attachment 2 Instructions to Bidders** excluding VAT and including all other expenses relating to Contract delivery.
Suppliers should ensure that there is no reference to prices within the Technical sections of their bids.

16. Staff and Customer Service

16.1. The Supplier shall provide a sufficient level of resource throughout the duration of the Contract to consistently deliver a quality service.

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

16.3. The Supplier shall ensure that staff understand the Authority's vision and objectives and will provide excellent customer service to the Authority throughout the duration of the Contract.

16.4. The Supplier shall communicate all changes to the Key Personnel as defined in the Call-Off Contract throughout the Term.

17. Security and Confidentiality Requirements

The Authority's security standards clauses are included as the Buyer's Security Policy within **Attachment 6a Contract Terms & Attachment 6b Order Form.**

17.1. Supplier Security Assurance Questionnaire

Suppliers and any sub-contractors are required to complete Attachment 5 Supplier Security Questionnaire as part of their bid, for the Authority to obtain a level of assurance with regards to our assets throughout the life of the contract.

17.2. Data Collection

17.3. Suppliers will be expected to clear any data collection tools with the Authority before engaging in field work. Suppliers should include Data Privacy Notices for research participants via respondent documentation and/or interviewer briefing notes, and clearly state what the data is being collected for and on behalf of the Authority and that no reference is made, implied or otherwise, to the data being used solely by or available only to the supplier. Suppliers should establish with the Authority the legal basis for data processing under the General Data Protection Regulation and the Data Protection Act 2018.

17.4. The respondent documentation and/or interviewer shall ensure that the respondent clearly understands (before they give their consent to be interviewed) the purpose of the interview, that the information they provide will only be used for research purposes and, in the case of interviews (telephone or face-to-face), that they have the right to withdraw from the interview at any time. Where consent is used as the legal basis for data processing, consent procedures should ensure compliance with the General Data Protection Regulation and the Data Protection Act 2018.

17.5. Burden

17.6. The Authority seeks to minimise the burdens on providers and teachers taking part in surveys. It is therefore important that bids should set out how the proposed methodology will minimise the burden on providers and/or teachers and a justification for the proposed sample size.

17.7. When assessing the relative merits of data collection methods, the following issues should be considered:

- only data essential to the project shall be collected;
- data should be collected electronically where appropriate and where teachers and/or providers prefer this;
- questionnaires should be pre-populated wherever possible and appropriate;
- Providers/teachers must be given at least four working weeks to respond to the exercise from the date they receive the request

17.8. The Contractor shall clear any data collection tools with the Authority before engaging in field work.

17.9. Consent Arrangements

The Authority and the supplier shall agree in advance of any survey activity taking place the consent arrangements that shall apply for each of the participant groups. All participants should be informed of the purpose of the research, that the supplier is acting on behalf of the Authority and that they have the option to refuse to participate (opt out). Where opt-in consent is used, the approach should be compliant with the General Data Protection Regulation and Data Protection Act 2018. Contact details should be provided including a contact person at the Authority.

18. Payment and Invoicing

18.1. Details of payment and invoicing requirements are included within **Attachment 6a Contract Terms** and **Attachment 6b Order form**.

Aims

The evaluation should aim to understand:

1. What is the impact of TRI on FE teacher attrition/drop out?
2. What is the impact of TRI on FE teacher recruitment?
3. To what extent has the TRI contributed to the outcomes identified in the theory of change, and what are the mechanisms underpinning this?
4. To what extent does evidence (both existing and collected through the evaluation) support the theory of change?
5. How do contextual factors e.g. participant demographic, socio-economic status, and institutional practice / culture affect these outcomes?
6. What lessons can be drawn from variations in different programme outcomes across different contexts?
7. Has the TRI led to perception of increased quality in provision among the statutory providers who employ teachers? (e.g. reduced disruption, increase in provision, fewer use of agency staff, reduction of associated HR costs, etc)

Methodology

Scoping and Planning:

- Inception meeting – to discuss proposed methods and underpinning assumptions to ensure supplier's approach fully addresses DfE's requirements. To discuss timelines for deliverables and the project management arrangements to ensure DfE is kept informed of progress and emerging findings.
- Familiarisation interviews with DfE officials and wider stakeholders – Conduct 8 interviews to inform evaluation plan. Interviews to include: DfE policy, research and data staff and relevant sector stakeholders.
- Desk research -
    - Review of existing literature
    - Review of management information from TRI claim platform
    - Review of the Theory of Change and baseline research
    - Review of secondary data: including but not limited to FEWDC, and other potential sources of outcome data for the QED.
    - Analysis of DfE baseline surveys:
        - Descriptive analysis of three DfE baseline surveys (TRI teacher, TRI SLT/HR and non-statutory teachers)
        - Slide deck and data dashboard of baseline findings)

Quasi-experimental impact evaluation:

Feasibility Study:

- Establishes the options for impact evaluation designs and assesses their feasibility and robustness.
- The first phase of the feasibility study will be to thematically explore the range of options available for different design aspects including:
    - Outcome measures
    - Data sources
    - Counterfactuals and comparison groups
    - Impact evaluation methods
- The second phase of the feasibility study will identify a short list of feasible approaches – combinations of the aspects outlined above – that appear to have the most promise for producing robust impact estimates in the full QED.
- The third phase will involve a robustness assessment of the potential approaches, with each approach being scored. This will be used to make a clear recommendation on whether to proceed to a full QED.

Full QED:

- If found to be feasible, a full evaluation plan will be developed and the full QED impact evaluation implemented.
- The analysis will estimate the impact of retention payments on the primary and secondary outcomes using regression models, accounting for relevant teacher and/or provider characteristics. A full audit trail of the code used, and outputs generated will be produced. The results will be estimated with confidence intervals and the implied level of precision and reliability communicated clearly alongside the headline findings.
- All analysis will undergo thorough QA checks, as outlined in Order Schedule 4, with the supplier providing evidence of this through QA logs.

Theory-based impact evaluation:

Surveys of teachers and HR/SLT staff:

- Surveys of beneficiaries along with teachers and HR/SLT staff in the non-statutory sector.
- For the intervention group, TRI teachers (n=c5,000) and HR/SLT (n=c280), there will be a census survey across two survey waves (Spring 2025 and Spring 2026).
- There will be an expected minimum response rate of 10%, where possible from a range of providers and subjects. Telephone boosts will be utilised to ensure sub-groups are of sufficient size for analysis, where possible. The response rate will be monitored whilst the survey is live, so that we can identify and target any underrepresented groups.

- For the comparator group, teachers and HR/SLT in the non-statutory sector, one survey wave will be issued in Spring 2026. This survey will be issued by DfE, but the supplier will provide input into the survey design. Findings and data from the RAP survey will be integrated into the final theory-based report and will be summarised in a slide pack.
- A clear strategy on survey dissemination and approaches to ensure the minimum response rate is achieved should be established. This will include using a data dashboard and production of communication flyers. Challenges with reaching the required response rate should be raised promptly and mitigations put in place.

Descriptive, bivariate and multivariate analysis will be undertaken at each wave (where sufficiently large sample sizes are achieved) to explore the relationship between dependent and independent variables and the factors associated with outcomes. Provider case studies:

- 8 case studies with 8 beneficiary providers. Two waves of fieldwork (2025 and 2026), consisting of semi structured interviews (with the same providers across the two waves, unless otherwise agreed with DfE). Incentive of £300 for beneficiary providers, with half the incentive distributed after the wave 1 fieldwork and the remainder after wave 2. The following type and number of participants will be interviewed in both waves of fieldwork.
    - Four teaching staff at each wave – 8 per case study (in a range of TRI eligible subjects)
    - Two members of HR/SLT

- 3 case studies with 3 providers in the non-statutory sector. One wave of fieldwork only (2026), consisting of semi-structured interviews. Participants from non-statutory providers will each receive an incentive of £30.
    - One teacher (in comparable TRI eligible subject, including but not limited to construction, engineering, science, maths, computing and early years)
    - One member of HR
    - One member of SLT

- There will be a flexible approach to data collection, including the option of a face-to-face, online or telephone interview.
- All interviews will be audio recorded (subject to consent) and transcribed for coding and analysis.
- Interviews will last up to an hour.

Stakeholder workshop:

- Online workshop with representation from FE providers and sector bodies (e.g. DfE, AELP, AoC, ETF, ASCL, ESFA, FEJobs, FECareers) to test the

ToC and the conclusions about the extent to which the TRI has contributed to outcomes in relation to retention, recruitment and quality of provision.

- The suppliers will lead the workshop, with a focus on scenario-based discussions to test the evaluation findings and emerging conclusions and recommendations. This workshop would run ahead of submitting the final report for the theory-based evaluation.

Advisory Group:

- CFE will establish and manage an advisory group to guide the evaluation, comprising representatives from a diverse range of FE institutions, subject areas, and geographic regions.
- Will be required to engage at key points in design and delivery, to be agreed with DfE, with a maximum of 3 meetings per calendar year (aligned to key milestones).
- The advisory group will be asked to provide guidance in the following areas:
    - Validating the proposed evaluation framework.
    - How the research can address practical challenges faced by teachers and institutions (e.g. through reviewing approach to the research, research tools).
    - Fostering a sense of ownership and relevance among participants.

Outputs

The contractor shall provide the following outputs in accordance with the agreed timetable set out below. All reporting outputs will be drafted to ensure accessibility to a general audience and will be professionally proofread and formatted with time allowed to respond to comments and feedback from the Department and to undertake any re-drafting or additional analysis that might be required, prior to sign off and publication.

- **Evaluation Plan** –
    - The theory-based evaluation plan will contain the revised ToC and indicator framework detailing the specific measures for the outputs, outcomes and impacts, along with an updated project plan and risk assessment. It will also include target sample sizes and mechanisms for maximising the response rate.
    - The QED plan will include the outcome measures, data sources, comparison group and evaluation analysis method. It will include sample information and statistical power calculations.
- **Findings presentations** – three presentations for the QED (feasibility, interim and final findings presentation) and two for the theory-based evaluation (wave 1 interim and full findings). These presentations will provide findings in an accessible, visually engaging format, along with proposed actions and next

steps for discussion with the DfE. The content of the presentations will be developed in discussion with DfE.

- **Final evaluation reports** – detailing the full findings from the QED feasibility study, theory-based evaluation and full QED evaluation (if feasible) in a robust and clear way. There will be a standalone executive summary with key messages distilled into one page for wider dissemination. The length of the report will be decided in discussion between the supplier and DfE, but we anticipate reports will not exceed 150 pages.
    - For the QED feasibility study the report will outline all options considered for the QED, the shortlist of feasible options and an assessment about which option(s) is the most robust and appropriate for conducting a full QED.
    - For the QED evaluation there will be an accompanying technical output detailing the analytical models used, calculations of sample sizes and minimum detectable effect sizes, the weighting applied (if appropriate), and data tables. The final QED evaluation report should draw on the theory-based evaluation findings to explore findings further.
    - For the theory-based evaluation there will be an annexe containing further technical information on methodology and datasets produced as part of the study. Syntax files for derived variables will be clearly labelled and detailed in the code book which will accompany the datasets.
    - Reports will be in the standard DfE reporting template and in line with the Department’s style guide, including alt-text for charts and graphics.
    - Each report will be reviewed and signed-off by DfE. There will be two rounds of comments, followed by any final minor amendments.
- **Additional reports -** A suite of two page case studies on each provider will be appended to the final theory-based evaluation report Analysis of the RAP survey will be presented as a slide pack. Findings and data from the surveys will be integrated into the final theory-based report.

Tasks

Tasks	**Outputs**	**Date Required**
Inception Meeting	Note of the meeting, decisions and actions agreed with DfE	6th March 2025
Data sharing arrangements Data request / application	Data sharing application	31st March
Advisory Group set-up	Anonymised list of providers and positions of staff involved.	21st April 2025

	Summary note of meetings and/or feedback received from group.	
Familiarisation interviews	8 interviews conducted with DfE and external stakeholders	30th April 2025
ToC development and scoping evaluation plans	Full evaluation plan integrating findings from desk research and revised ToC	16th May 2025
QED feasibility study		
QED feasibility study		30th April 2025
QED feasibility presentation	QED feasibility presentation	30th April 2025
QED feasibility report	QED feasibility report	16th June 2025
Theory-based evaluation		
Data sharing arrangements for contact details	DSAP form and approval from DSAP board	30th April 2025
Analysis of DfE Baseline surveys	Slide deck of descriptive analysis and interim data dashboard	30th April 2025
Design and programme beneficiary surveys - Wave 1	Beneficiary survey	30th May 2025
Survey administration and monitoring - Wave 1	Survey fieldwork live Weekly update on response numbers	30th June 2025
Analysis of RAP surveys – Wave 1	Summary note on Wave 1 (to feed into summary slide pack and final report)	30th June 2025
Design and plan case studies – Wave 1	Case study sampling strategy	31st July 2025
Case study wave 1 fieldwork (beneficiary teachers and HLT/SLT)	Interim report	30th November 2025
Review findings against ToC		12th December 2025
Full QED evaluation plan	Full QED evaluation plan	17th September 2025
Interim presentation	Wave 1 Interim findings presentation (survey and case study findings)	30th November 2025
Data dashboard	Provider data dashboard	30th January 2026

Design and programme beneficiary surveys - Wave 2	Beneficiary survey	30th April 2026
Survey administration and monitoring – Wave 2	Survey fieldwork live	30th June 2026
Input into RAP surveys – Wave 2	RAP survey	30th May 2026
Design and plan case studies – Wave 2	Case study sampling strategy (if new case study providers are selected)	30th May 2026
Case study wave 2 fieldwork (beneficiary teachers and HLT/SLT and non-statutory sector)	Short case study report of key themes	31st July 2026
Analysis of RAP survey – Wave 2	Summary slide pack of RAP analysis (baseline and follow-up)	31st August 2026
Stakeholder workshop	Summary note of meeting including main findings and actions	30th September 2026
Review findings against ToC		30th September 2026
Draft evaluation report	Draft findings theory-based evaluation report	30th October 2026
Advisory group dissemination	Findings presentation to advisory group	30th October 2026
Final evaluation report	Full findings theory-based report	1st December 2026
Full QED evaluation		
Draft and finalise plan for full QED	QED evaluation plan	30th September 2026
Statistical analysis		30th November 2026
Interim QED presentation	Interim QED presentation	14th December 2026
Final QED report	Full findings QED report	1st December 2027

ORDER CHARGES

Milestone	Description	Invoice scheduled for	Cost
12. Initial development and Planning	• Inception meeting • Desk-research (review of literature, management information and secondary data) • Initial scoping work for familiarisation interviews	31st March 2025	[redacted]
13. Evaluation plan with developed ToC and analysis of baseline surveys	• Remaining familiarisation interviews with range of stakeholders • Advisory group set up • Theory of Change development	31st May 2025	[redacted]

	• Evaluation plan - submitted and signed off by DfE • Analysis of baseline responses and headline findings		

14. QED feasibility study	• Explore the range of design options available, including:
	  ○ Outcome measures
	  ○ Data sources
	  ○ Counterfactuals and comparison groups
	  ○ Impact evaluation methods
	• Findings presentation
	• Findings report
		30th June 2025	[redacted]

BREAK CLAUSE 1: [redacted]			
15. Wave 1 Survey Fieldwork	• Communication strategy set-up (including flyers and data dashboard) • Questionnaire development • Online scripting and data processing • Administration • Sufficient number of survey responses received (10% response rate)	31st July 2025	[redacted]
16. Finalise full QED Study plan	• Full QED study plan - submitted and signed off by DfE	30th September 2025	[redacted]
17. Wave 1 Case Studies Fieldwork Wave 1 Interim presentation	• Case study sampling and topic guide development • Wave 1 of fieldwork conducted with 8 providers (10 interviews in each)	30th November 2025	[redacted]

	• Interim report for theory-based evaluation • Analysis completed for survey • Clear headline findings • Presentation to DfE		
BREAK CLAUSE 2: [redacted]			
18. Wave 2 Survey Fieldwork	• Questionnaire development and scripting • Input into DfE RAP surveys • Administration • Sufficient number of survey responses received (10% response rate)	31st July 2026	[redacted]
19. Wave 2 Case Studies Fieldwork	• Case study sampling and topic guide development • Wave 2 of fieldwork conducted with 8 beneficiary providers (6 interviews in each) and 3 case studies in the non-statutory sector (3 interviews in each)	31st July 2026	[redacted]
20. Final theory-based report and outputs signed off, meeting DfE standards Full QED impact evaluation – analysis 24/25 AY data from FEWDC	• Stakeholder group to test ToC • Summary findings presentation to DfE and advisory group • Final theory-based evaluation reports meeting DfE standards signed-off • Impact statistical analysis • Quality checks • Interim findings presentation	31st December 2026	[redacted]

21. Full QED impact evaluation – analysis 25/26 AY data from FEWDC	• Impact statistical analysis (25/26 data) • Quality checks	31st October 2027	[redacted]
22. Final QED report and outputs signed off, meeting DfE standards	• A full audit trails of the code used, and outputs generated • Findings presentation • Findings report meeting DfE standards signed-off	31st December 2027	[redacted]
FINAL PHASE: [redacted]			

Liaison Agreements

Minimum requirements throughout the research project include:

Inception: The supplier will attend a virtual inception meeting. This will be held with relevant DfE teams.

Workplan for project: The supplier will develop a workplan including a timeline for input from DfE (including time for sign-off of all research materials and reports).

Project management: The supplier will attend regular online meetings with the DfE project manager (and any other relevant DfE team members as necessary) with an initial agreed frequency of a virtual meeting every fortnight. These meetings will be accompanied by a brief written project update. Both the supplier and the DfE are willing to allow flexibility around the frequency of meetings to accommodate busy or quieter periods of the evaluation.

Data collection: The supplier will be expected to clear any data collection tools with the DfE before engaging in fieldwork.

Review/decision meetings: The supplier will attend an additional meeting to discuss in-depth the results of the QED feasibility study.

Interim presentations: A meeting between the DfE and the Supplier (including all Key Staff as detailed in Attachment 6b Order Form) will be organised to take place to accompany the submission of the theory-based interim presentation. There will also be an interim presentation for the QED impact evaluation (if found to be feasible).

Break Clauses

We have included three break clauses within our payment milestones.

Break Clause 1: This clause is applicable following the completion of the QED feasibility study (milestone 3). If the outcome of the feasibility study concludes that full quasi-experimental impact evaluation will not be robust or recommended, this break clause may be enacted. This means the project length will be reduced by approximately one year and costs will be altered accordingly. Costs will be reduced to account for the not proceeding with the full QED study including planning, analysis, reporting and any project management costed for the full QED. The theory-based element of the evaluation will continue.

[redacted]

Data Collection

- The supplier will be expected to clear any data collection tools with the Department before engaging in field work. Suppliers should include Data Privacy Notices for research participants via respondent documentation and/or interviewer briefing notes, and clearly state what the data is being collected for and on behalf of the Authority and that no reference is made, implied or otherwise, to the data being used solely by or available only to the supplier.
- The supplier will establish with the Department the legal basis for data processing under the General Data Protection Regulation and the Data Protection Act 2018.
- The respondent documentation and/or interviewer shall ensure that the respondent clearly understands (before they give their consent to be interviewed) the purpose of the interview, that the information they provide will only be used for research purposes and, in the case of interviews (telephone or face-to-face), that they have the right to withdraw from the interview at any time. Where consent is used as the legal basis for data processing, consent procedures should ensure RM6126 - Research & Insights DPS Project Version: v1.0 48 Model Version: v1.0 compliance with the General Data Protection Regulation and the Data Protection Act 2018.

Burden

The Department seeks to minimize the burdens on Further Education providers and Further Education teachers taking part in research. When assessing the relative merits of data collection methods, the following issues will be considered:

- Only data essential to the project shall be collected
- Data should be collected electronically where appropriate and where providers/teachers prefer this
- Questionnaires should be pre-populated wherever possible and appropriate
- Providers and teachers must be given at least two working weeks to respond to the exercise from the date they receive the request.

Consent Arrangements

All participants should be informed of:

- The purpose of the research
- That the supplier is acting on behalf of the Department
- That they have the option to refuse to participate (opt out). Where opt-in consent is used, the approach should be compliant with the General Data Protection Regulation and Data Protection Act 2018.
- The suppliers contact details should be provided to all participants.

Incentives

- The use of incentives to support response rates or participation in research (beyond what is already described in the methodology section) must be funded within the agreed budget for work.
- There will be no additional budget for extra incentives if the required response rate is not met.