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## 1. BACKGROUND

- 1.1 The Department for Levelling Up, Housing and Communities (DLUHC; “The Authority”) is seeking to procure a Delivery Partner or partners (“The Supplier”) to provide support and advice to prospective applicants to the Community Ownership Fund (COF); and ongoing support and advice to community organisations in receipt of COF funding.
- 1.2 The Department for Levelling Up, Housing and Communities supports communities across the UK to thrive, making them great places to live and work.
- 1.3 In March 2021 the Government announced a new £150 million Community Ownership Fund, to support people to take ownership of vital community assets and amenities at risk of closure in their local area.
- 1.4 The fund is open to all eligible community organisations in England, Scotland, Wales, and Northern Ireland. A variety of asset types are in scope of the fund, including (but not limited to) community centres, galleries, sporting and leisure facilities, pubs, parks, and theatres. Groups can bid for up to £250,000 match funded capital, and in exceptional cases up to £1million match funded capital for assets relating to sports facilities. The fund will run until March 2025.
- 1.5 The updated [Community Ownership Fund prospectus](#), published in Spring 2022, provides further detail on eligibility for the fund and how community organisations can apply for funding.
- 1.6 The prospectus also sets out the strategic objectives of the Community Ownership Fund, which more broadly aims to:
  - 1.6.1 Provide targeted investment for communities to save community assets that would otherwise be lost.
  - 1.6.2 Strengthen capacity and capability in communities to support them to shape their places and develop sustainable community businesses.
  - 1.6.3 Empower communities in left behind places to level up.
  - 1.6.4 Strengthen direct links between places across the UK and the UK Government
- 1.7 The Community Ownership Fund is overseen by officials in a policy and delivery team in DLUHC. The team is responsible for the overall progress of the fund, including setting policy; running the application and assessment process; convening cross-Whitehall engagement; advising Ministers on funding recommendations; and overseeing the ongoing delivery of funded projects through a team of grant managers. The proposed split of roles and responsibilities for the Delivery Partner is set out in further detail in section 3 (“The Requirement”).

### Recent milestones

- 1.8 We ran the first round of the Community Ownership Fund between July and August 2021, as a pilot to test community appetite and trial the policies and processes we had developed. In October 2021 [we announced](#) £5.3 million of funding to 21 successful bidders from Round 1.

- 1.9 The fund was reopened to eligible bidders from Round 1 in December 2021, with further successful projects announced between December and May 2022. So far, across the first bidding round the Community Ownership Fund has funded a total of 38 projects totalling £10.1m. These include a range of asset types with a purposeful geographic spread across the UK.
- 1.10 The next round of the fund launched June 10th 2022. We plan to run three funding windows per financial year up until 2024/25.

## **2. BACKGROUND TO THE REQUIREMENT**

- 2.1 The first round of the Community Ownership Fund prioritised allocating funding to projects which already had strong capability, were ready to access match-capital funding, and could complete and draw down all capital on their projects within 6 months.
- 2.2 We know that the readiness of community organisations across the UK to take on ownership of their assets is varied. Our evidence base suggests that a majority of potential community projects require development support to become ready for investment, and that in order to build a strong and diverse pipeline of projects higher levels of support should be targeted to groups that have less access to social infrastructure. Indeed, for future rounds we want to ensure that the broadest possible range of projects can be supported to access the fund, make strong and convincing applications, and receive ongoing advice and support in the running of their assets. Our long-term aim is to secure a legacy of capacity and capability in the sector, to last well beyond the lifecycle of the Delivery Partner's support offer, and broader funding programme.
- 2.3 From our market research we know that this role will be most effectively fulfilled by a consortium of partners, however a single organisation with an expansive network across the UK may also be considered, working alongside the Authority to deliver the fund. The Delivery Partner will evidence a strong breadth of expertise across the four nations of the UK and across the wide variety of asset types that can be supported by the fund. They will also evidence a strong depth of knowledge and experience in advising community organisations to improve their capacity and capability, to ensure the sustainable running of valued community assets into the future.
- 2.4 The Authority will start to deliver the Community Ownership Fund in a five-stage model. This model and the intended split of responsibilities between the Authority and the Delivery Partner is summarised below. We will require the Delivery Partner's activities to support the delivery of the fund to varying degrees at each stage:

### **2.4.1 Stage 1: Promotion, high-level support, and triage**

Applicants will have access to general advice on the fund, through online materials provided by the Authority and Delivery Partner, and a 'signposting' support offer run by the Delivery Partner comprising an advice line; brief 1:1 advice; and explanations of eligibility requirements.

### **2.4.2 Stage 2: Expression of interest (EOI)**

Applicants will be able to submit a short EOI to the fund, which will be always open for submissions and frequently assessed by the Authority. The

EOI enables a purposefully ‘light-touch’ initial assessment of an organisation’s eligibility for the Community Ownership Fund, with a focus on gateway criteria such as the headline funding asks and the nature of the asset to be brought into community ownership. The EOI will have two outcomes: 1) the applicant is considered to be eligible to submit a full application and the Authority will refer the applicant to be considered by the Delivery Partner to receive in-depth development support for their proposal, or; 2) the applicant was assessed by the Authority and found to be ineligible for the fund.

2.4.3 *Stage 3: In-depth development support*

This stage is where we anticipate that the bulk of the Delivery Partner’s activity will initially take place. Using a set of criteria agreed with the Authority (including ONS social metrics), the Delivery Partner will help assess whether the applicant’s organisation should receive support to develop their proposal for COF funding, and the level of support that the applicant should receive. As appropriate, the Delivery Partner will then go on to provide a programme of targeted, in-depth development advice and coaching to the applicant, including help with elements such as business case development; organisational constitution and governance; and financial planning. In addition, the Delivery Partner will have discretion to allocate small, specialist revenue grants of an average of £5,000 per project for highly specialised support such as legal advice or building surveys (i.e. services that sit beyond the scope of normal community business development advice).

2.4.4 *Stage 4: Full application*

Activity in this stage will largely be the responsibility of the Authority. Projects which pass the EOI stage will be invited to submit their full application to the fund, within one of the ‘full application windows’ that will be open three times per financial year. The Authority will be responsible for assessing the full application; conducting due diligence of applicants; making recommendations to ministers on which bids should be funded; informing applicants of the outcome of their bid; and communications activities around successful projects.

2.4.5 *Stage 5: Ongoing monitoring and support*

The Authority will be responsible for most of the activity in this stage via their grant management team. This includes responsibility for ongoing grant and relationship management; making grant payments to projects and monitoring spend; broader evaluation of the COF programme and reviewing the effectiveness of the fund against its objectives on an ongoing basis. The Delivery Partner will carry out some activities at this stage as a further ‘layer’ of support, including acting as an initial point of contact for basic queries, and some broader capacity building activity that we would expect the Delivery Partner to undertake, such as delivering training sessions on different topics and by facilitating forums such as peer-support networks for COF-funded projects.

- 2.5 The suggested activities of the Delivery Partner within this five-stage model are set out in further detail in section three below (“The Requirement”).

- 2.6 We have set aside funding for a Delivery Partner to fulfil the requirements of the Delivery Partner until the end of the 2024/25 financial year. This will ensure that community groups across the UK have access to the variety of early stage; in-depth development; and ongoing delivery support for the duration of the COF programme. We would expect for the last of the in-depth development work to have completed in good time for assisted projects to have submitted full applications before the fund closes in the final quarter of the 2024/25 financial year.

### **3. THE REQUIREMENT**

- 3.1 The Authority is seeking to procure a Delivery Partner to provide a suite of initial support, in-depth development support, and ongoing delivery support to community organisations seeking or in receipt of funding from the Community Ownership Fund. This support will strengthen community groups' ability to make convincing applications to COF; will enable groups to take valued local assets into community ownership with strong business models; and leave a legacy of increased capacity and capability in the sector, so that COF funding has a sustainable impact beyond the programme's lifecycle.
- 3.2 The intended outcomes of this support offer are:
- 3.2.1 Over 900 applicants with increased capability to develop successful funding bids as a result of being supported at EOI and/or full application stage
  - 3.2.2 Over 400 successfully funded community assets delivering for their local communities long term instead of being lost to the community
  - 3.2.3 Strengthened capacity and capability in the communities sector to support, develop and operate sustainable community businesses
  - 3.2.4 Communities in left behind places empowered to level up contributing to the UK government's levelling up mission 'Pride in Place'<sup>1</sup>

#### **Scope of work**

##### *The reach of the service across the UK and asset types*

- The service provided by the Delivery Partner will be UK-wide, and community organisations applying to the fund or in receipt of funding should receive the opportunity for the same standard of service wherever they are in the UK. The Delivery Partner should be able to provide a physical presence in each country of the UK, as required by applicants. The Delivery Partner will need the ability to provide the service in the English and Welsh languages to community organisations that require it and will need to be mindful of any future potential legislative changes to language requirements. The Delivery Partner should ensure that advice provided is relevant and applicable to the local contexts and legal jurisdictions of each constituent country of the UK. The Delivery Partner will need to demonstrate an in-depth understanding of the community support landscape across the UK and how the

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<sup>1</sup> By 2030, pride in place, such as people's satisfaction with their town centre and engagement in local culture and community, will have risen in every area of the UK, with the gap between top performing and other areas closing (Levelling Up White Paper, 2022)

COF support offer will integrate with existing services and not duplicate. For example, for Northern Ireland this would include a clear understanding of the unique legal requirements, local government landscape and the support groups require to realise asset transfers in Northern Ireland.

- 3.3 This includes demonstrating that the Delivery Partner has relevant contacts and networks in place across the UK.
- 3.4 The Authority is committed to fair opportunities to access the Community Ownership Fund across all nations of the UK – including fair opportunity to access the services of the Delivery Partner. Scotland, Wales and Northern Ireland will benefit from a guaranteed allocation from the fund in line with per capita share. This means a minimum of £12.3 million of COF funding for Scotland, £7.1 million for Wales, and £4.3 million for Northern Ireland. The Delivery Partner should consider this in their design of the service and explain how delivery of the support offer will be of equal quality in each country.
- 3.5 The Delivery Partner should recognise that community organisations seeking to apply to the fund will be at very different levels of readiness and capability. Some will require basic signposting to application materials and an explanation of eligibility criteria, whereas others will require a bespoke and targeted suite of support to develop their proposal. Indeed, the projects that the Delivery Partner will be required to target their support to (based on criteria agreed with the Authority and ONS social metrics) are likely to have significantly higher support needs. At the same time, the Delivery Partner should be able to make sound judgements on which projects will not be suitable for support from the COF and signpost those groups to more suitable services.
- 3.6 The Delivery Partner should also evidence how the service will offer support and advice on the full range of potential community asset types that can be covered by the fund. As listed in the prospectus, these include (but are not limited to) assets such as community centres, galleries, sporting and leisure facilities, pubs, parks, and theatres. The Authority is not prescriptive about the range of assets that are eligible for funding, and so the Delivery Partner should be able to demonstrate flexibility and access to a breadth of knowledge and expertise on taking community ownership of a variety of asset types. An idea of the range of asset types that we have funded so far can be found in the [Round 1 successful bidders](#) announcement.

*Delivery Partner activities within the COF customer journey*

- 3.7 The Delivery Partner will be expected to provide a range of support and advice at different stages of applicants' journeys throughout the COF application and delivery process. The Delivery Partner is expected to demonstrate that they can successfully deliver this customer journey through their service while at the same time demonstrating a degree of flexibility given that priorities may shift over the lifetime of the fund. For example, it is expected that initially a lot of focus will be on providing in-depth development support to applicants successful at EOI stage, while later on in the fund's lifecycle there might be greater focus on promoting the fund to community groups ensuring a diverse range of groups is targeted and accesses the fund.
- 3.8 Stage 1: Promotion, high level support and triage
  - 3.8.1 The Delivery Partner will deliver promotional activity to reach community groups and promote COF through community networks, local organisations, and at a hyper-local level across the UK and with

consideration for Welsh language requirements. This will include events such as webinar sessions and activity targeted at different geographies and asset types. The Delivery Partner is expected to demonstrate a sound communication and marketing plan setting out how this will be achieved, including which channels will be used and how contact lists and networks will be accessed. The Delivery Partner should also demonstrate how a diverse and inclusive range of community groups will be reached based on evidence of what works. The Delivery Partner will have an advisory role in helping the Authority to continuously improve its suite of promotional and information materials for the fund.

3.8.2 The Delivery Partner will provide a digital front door service to all community organisations interested in applying to the fund. This should include administration of a telephone advice line, a general queries email inbox, and group webinars. The Delivery Partner should demonstrate that they have Customer Relationship Management (CRM) systems or similar in place to manage and maintain large volumes of contacts in line with data protection requirements and to record the support provided to individual organisations. The Delivery Partner should also demonstrate how community groups across the UK can access the service, in particular groups based in rural areas where digital connectivity may be an issue.

3.8.3 The Delivery Partner will signpost interested applicants to the fund's application materials. They will provide basic information and advice on community assets and running community businesses; explain the application process of the fund; give advice the eligibility requirements; share case studies of successful projects; and suggest next steps for interested community organisations. The Delivery Partner should also demonstrate the capability to assess whether the applicant could be signposted to other existing advice services and suggest alternatives to COF funding where it is clear from the outset that eligibility requirements for COF are not met.

### 3.9 Stage 2: Expression of Interest

3.9.1 The Delivery Partner will signpost applicants to the digital Expression Of Interest form. Applicants will submit the EOI form. The Authority will receive and assess EOI forms from applicants, determining whether an applicant is eligible to receive COF funding. The Authority will then refer all eligible applicants to the Delivery Partner.

3.9.2 The Delivery Partner will be required to assess the project against appropriate index and metrics and target in-depth support where it will have the greatest impact. The index will be based on the Delivery Partner's assessment of the applicant's maturity and specific support needs, with specific indices to be agreed upon with the Authority; and the metrics will be decided on by the Authority and will determine the level of existing social infrastructure in a local place. Once the applicants have been assessed, the Delivery Partner will set out what the programme of support should look like for each specific applicant. Within this framework, the Delivery Partner will have broad discretion to offer applicants in-depth development support. This will be subject to spot-checks carried out by the Authority on decision-making and the proposed programmes of support.

3.10 Stage 3: In depth development support

- 3.10.1 We expect this to be the largest element of the support provision from the Delivery Partner at least for the first year of the contract.
- 3.10.2 After identifying whether the applicant will benefit from an offer of in-depth development support against the agreed index and metrics the Delivery Partner will formulate a programme of activity to develop the applicant's proposal: upskilling the applicant so that they are able to make a strong and convincing full application to the fund.
- 3.10.3 The Delivery Partner will provide this support and advice in the manner that is most appropriate to the applicant which includes prioritising greater support to applicants of higher need. This might include running individual coaching calls with applicants; running group webinars; providing best practice case studies; signposting to specific technical advice and guidance; formulating and agreeing action plans with applicants; and establishing links with previously successful projects.
- 3.10.4 Dependent upon the applicant's individual action plan, the Delivery Partner will provide support on a range of different topics. This might include (but is not limited to) advice on:
- 3.10.4.1 Strategy development – working with applicants to help them envision the future of their asset; identify their priorities; and scope and plan their next steps towards developing successful proposals.
  - 3.10.4.2 Governance structures – how to constitute the organisation in an eligible not-for-profit structure; establish appropriate governance structures to run the asset for community benefit; and upskill applicants in project management methods.
  - 3.10.4.3 Asset acquisition – including expert advice on purchases and securing appropriate leases, to help the applicant secure the asset on fair terms, and providing advice on Assets of Community Value and Community Asset Transfers.
  - 3.10.4.4 Financial development - including financial modelling to raise and manage finances for the lifecycle of the project; signposting to other match-funding opportunities.
  - 3.10.4.5 Business development – including the development of sustainable business cases; and advice on practical elements of trading such as facilities management; recruitment; HR; and payroll.
- 3.10.5 The Delivery Partner will have discretion to administer additional small revenue grants of on average £5000, to enable groups to access support such as legal advice or building surveys from specialist providers. The Delivery Partner will administer these grants in line with [Manging Public Money requirements](#) and subject to spot-checking from the Authority, with the grants being spent with other external providers (such as solicitors and surveyors). The Authority will regularly check that grants paid out by the



Delivery Partner have been spent in line with programme rules and the Delivery Partner is required to keep all relevant evidence on hand.

- 3.10.6 Once an applicant's action plan is completed and the applicant is ready to submit their full application, the Delivery Partner will review the application.. The Delivery Partner will then inform the Authority on the level of support (if any) that was provided for this application.

3.11 Stage 4: Full application

- 3.11.1 Following the applicant's submission of their full application via the online portal, the Authority is responsible for all assessment activity, ranging from receiving full applications through to recommending and announcing successful bids. At this stage we will expect to see evidence of the benefit of the Delivery Partner's activities, through seeing an increased proportion of strong, eligible applications for the fund, from a diversity of asset types and locations across the UK. Although it is not a direct performance indicator we would expect to see more fundable bids from areas of the UK with lower existing social infrastructure as determined by the national metrics decided on by the authority.

- 3.11.2 If a full application is not approved by the Authority, the applicant is invited to attend a feedback session with the Delivery Partner. The Delivery Partner is expected to provide advice on how the application could be strengthened further or signpost to alternative sources of funding.

3.12 Stage 5: Ongoing support

- 3.12.1 If a full application is approved, the Authority will assign an internal DLUHC grant manager to the successful project. The Authority will lead on all key aspects of grant management. The Delivery Partner will provide an additional support offer, helping community groups in setting up and running successful and sustainable community businesses. The Delivery Partner will do this by acting as a point of contact for grant recipients who have basic queries or concerns about the delivery of their projects. The Delivery Partner will liaise closely with DLUHC grant managers to address queries and advise the Authority on project risks. The Delivery Partner will be expected to attend each virtual Initial Project Meeting (IPM) between a DLUHC grant manager and a successful grant recipient. The Delivery Partner will attend, where required, site visits with the Authority. As required the DLUHC grant manager will ask the Delivery Partner to work in depth with a project if they are experiencing significant delivery issues that threaten the successful running of the community business.

- 3.12.2 The Delivery Partner will host a range of information webinars supporting grant recipients in understanding the COF technical guidance and requirements for project delivery as set out in the Grant Funding Agreement. The Delivery Partner will support projects in building their delivery capacity which may include webinars on successful project management, procurement, fraud prevention and evidence required for claiming the COF grant. The Delivery Partner may develop additional training material explaining the programme requirements.

- 3.12.3 The Delivery Partner will facilitate peer support across successful COF projects by facilitating a project network for exchanging good practice and learning which should also feed into the applicant support offer.

*Delivery Partners should set out in sufficient detail:*

- 3.12.4 Where and how they will deliver the service mapped against the 5-stage delivery structure and the customer journey as set out in the section above. The Delivery Partner will be expected to evidence their delivery readiness by providing, for example, detail around how they will draw upon their experience, their communication and marketing plan, action plans for projects and how the small grants will be administered successfully.

- 3.12.5 How the service will be delivered:-

3.12.5.1 Geographically across the whole of the UK and at hyper-local level;

3.12.5.2 Across the full range of asset types eligible for the fund; and

3.12.5.3 Across the whole COF customer journey as mapped out above.

It is expected that Delivery Partners will evidence this by providing, for example, evidence of existing networks and working partnerships, evidence of geographic presence across the whole of the UK, and an in-depth understanding of existing service structures on the ground, demonstrating the additionality of the COF support offer while not duplicating activity.

- 3.12.6 Their approach to prioritising and allocating support (in line with the criteria set out by the Authority); and their approach to formulating bespoke programmes of activity for community organisations, for the in-depth development support offer.

- 3.12.7 Ways to work with groups of community organisations to promote sector-wide learning, capacity, and capability building. Where appropriate this could include convening or grouping community organisations to deliver elements of advice simultaneously (such as in workshops and webinars), and promoting peer-learning and networks.

- 3.12.8 How quickly the service can be set up. The Delivery Partner will be expected to deliver initial advice and support to applicants ideally within one month of the contract start and no later than three months after the start of the contract.

Management arrangements (included for contextual information only)

- 3.13 The Delivery Partner should set out in their proposal their work plan, team structure, management approach, and personnel that will be provided as part of the service. The Delivery Partner should also provide detail regarding any partnership agreements they may have in place or are planning to put in place as part of a consortium bid.
- 3.14 There will be a 4 week inception phase, followed by a short pause pending approval of an inception report. During this phase, we expect the Delivery Partner to mobilise

key staff and work with DLUHC colleagues, progressing deliverables for stage 1 (set out in section 11) as well as stages 2 and 3.

- 3.15 The Delivery Partner should detail how they will work in a flexible and adaptive way, responding to lessons learned to continuously improve the service, as they step up the support offer to community groups.
- 3.16 The Delivery Partner team should include a senior leader who is the single point of accountability for the Delivery Partner's delivery, and can act as the lead contact for DLUHC in managing the contract.
- 3.17 While a consortium must be managed by one lead organisation (the Delivery Partner), the Delivery Partner should also ensure that the Authority has one dedicated contact person for each organisation that is part of a potential consortium, and ensuring that DLUHC officials are invited to attend regular partnership steering groups or key progress meetings.
- 3.18 The Delivery Partner should set out what they would ask of DLUHC in order to support the delivery of their work and maximise its impact. This might include proposals for triage structures for passing applications between the Authority and the Delivery Partner; or how best to deploy policy guidance to support the work of the Delivery Partner.

#### Budget and timeframe

- 3.19 The budget maximum is £5m and we expect the budget required to be between £3m-£5m for the Delivery Partner, this includes the administration costs for providing revenue grants to applicants. Any spend over the maximum budget of £5m will be unacceptable. There is a separate budget of c. £1m for the revenue grants themselves which is not included in the value of this contract. The Fund will run until the end of the 2024/25 financial year, and the Authority currently plans to run three bidding windows for community organisations to apply to the Fund per year. The contract is expected to run for 2.5 years (October 2022 until March 2025). There will be scope to consider a potential time extension of up to 6 months if the Authority decides this is required for the orderly closure of the contract. The Delivery Partner is invited to set out their timeframe for the closure of the service.

#### **4. KEY MILESTONES**

- 4.1 The Delivery Partner should note the following key milestones for COF.

Milestone	Description	Timeframe
1	COF Round 2 Application window 1 closed	End of August 2022
2	Application window 2 opens	October 2022
3	Appointment of Delivery Partner	December 2022
4	Completion of Delivery Partner inception phase and start of support to community groups	February 2022
5	Successful bids from application window 1 announced	December 2022

6	Application window 2 closes	December 2022
7	Application window 3 opens	TBC
8	Successful bids from application window 2 announced	Spring 2023
9	Application windows are repeated with three windows per year	January 2023 until March 2025
10	Delivery Partner contract end date	March 2025

## **5. AUTHORITY'S RESPONSIBILITIES**

- 5.1 DLUHC will seek to work very closely with the Delivery Partner during the inception phase and throughout the contract. This will include sharing of intelligence and data where appropriate and closely liaising with the Delivery Partner across all stages of the delivery model.

## **6. REPORTING**

- 6.1 The Delivery Partner will provide at least weekly updates during inception, followed by at least fortnightly progress updates during implementation. These should include work and deliverables completed during the period, plans for the next period and flagging any key risks or actions.
- 6.2 The Delivery Partner will also attend monthly monitoring meetings with the Authority and provide ad hoc updates where required. The Authority may require the Delivery Partner to set out actions for how to address any slippage in relation to deliverables (in Section 11) and other KPIs. If the Delivery Partner fails to action these sufficiently, the Authority can reduce or withhold payment of the Delivery Partner.
- 6.3 The Delivery Partner will provide the Authority with evidence that KPIs are being achieved and facilitate any spot checks that the Authority will conduct on the quality of support provided, as well as evidence related to the disbursement of grants to applicants. If the Delivery Partner fails to meet the KPIs, the Authority can reduce or withhold payment of the Delivery Partner.

## **7. CONTINUOUS IMPROVEMENT**

- 7.1 The Delivery Partner will be expected to continually improve the way in which the required Services are to be delivered throughout the Contract duration.
- 7.2 The Delivery Partner should present new ways of working and ongoing learning to the Authority during quarterly review meetings.
- 7.3 Changes to the way in which the Services are to be delivered must be brought to the Authority's attention and agreed prior to any changes being implemented.

## **8. SUSTAINABILITY AND SOCIAL VALUE**

- 8.1 The Delivery Partner should set out how they will operate in a way that leaves a sustainable impact. For the purposes of this requirement, the Delivery Partner should address how they will ensure that the support offer they provide places individual projects on the best possible footing to be run as lasting, sustainable businesses for community benefit. They should also demonstrate the broader benefits of the capability-building work they undertake, and how this might achieve a legacy of increased capacity in the community ownership sector beyond the life of the fund.

- 8.2 The Delivery Partner should set out how they will directly contribute at least 10% of the contract value to social value policy outcomes (going beyond what the core delivery of the contract achieves). This should specifically tackle the following themes:-

Theme 2: Tackling Economic Inequality (e.g. employment and training opportunities in particular for under-represented groups)

This could include:

- Offering additional Project Management training for young people and/or under-represented groups.
- Helping upskill people facing digital exclusion
- Working with a range of smaller organisations who employ local people
- Working with a range of organisations with diversity in their leadership
- Employing people from disadvantaged backgrounds and deprived communities to help with the delivery support.

Theme 3: Fighting Climate Change (e.g. how will you contribute to reducing climate change impact, environmental waste)

This could include:

- Providing energy efficiency advice to projects.
- Helping projects measure and quantify their environmental impact.
- Helping projects successfully utilise local supply chains.

## 9. ACCREDITATION

- 9.1 There is no specific accreditation required for this service.

## 10. STAFF AND CUSTOMER SERVICE

- 10.1 The provider's staff assigned to the Contract will have relevant expertise and experience to deliver the Contract. The Delivery Partner should propose at least 3 FTE as 'key personnel', the most critical to the delivery of the contract – these personnel can only be substituted with permission of DLUHC.

## 11. SERVICE LEVELS AND PERFORMANCE

- 11.1 The Following KPIs reflect the minimum performance requirements for the Delivery Partner. We would encourage Delivery Partners to propose other key performance indicators for their work. The Authority will consider these, and otherwise measure the quality of the Delivery Partner's delivery first and foremost by satisfactory completion of all deliverables, followed by monitoring of progress against outputs and outcomes. Failure to satisfactorily deliver against these KPIs can result in the Authority reducing or withholding payment to the Delivery Partner

KPI	Delivery Stage	KPI type (deliverable / output/ outcome) and description	Target and how outputs will be evidenced
1	Stage 1	Deliverable: Detailed Communications and Marketing Plan	1

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Schedule 2 – Specification

2	Stage 1	Deliverable: Digital Front Door / Advice line for applicants to access the initial service	1
3	Stage 1	Deliverable: Internal CRM system or similar set up to manage applicant information	1
4	Stage 1	Output: number of applicants supported with initial advice, signposting and triage	At least 2500 (regular reports from CRM system to evidence progress)
5	Stage 1	Output: number of organisations reached via promotional activity and events across the UK and asset types	At least 5000 (regular reports from CRM system, evidence of events held)
6	Stage 1	Outcome: number of applicants submitting an EOI having received initial Delivery Partner advice reflecting a spread across all 4 nations and all asset types	At least 900 (regular reports from CRM system)
7	Stage 2	Deliverable: framework for screening and deciding which applicant will receive in-depth support	1
8	Stage 3	Deliverable: action plan template for applicants	1
9	Stage 3	Deliverable: process for disbursement of small grants to applicants	1
10	Stage 3	Deliverable: good practice materials	1
	Stage 3	Deliverable: applicant feedback survey	1
11	Stage 3	Output: number of applicants supported with in-depth advice and action plans	At least 400 (regular reports from CRM system)
12	Stage 3	Output: number of grants provided to applicants	400 (regular reports from CRM system)

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Schedule 2 – Specification

13	Stage 3	Output: number of applicants signposted to other specialist advice services or successful projects for additional advice	At least 100 (regular reports from CRM system)
14	Stage 3	Outcome: percentage of applicants satisfied with in-depth advice support based on evaluation surveys	95% (regular surveys)
15	Stage 4	Outcome: number of applicants submitting a full application with Delivery Partner support reflecting a spread across all 4 nations and all asset types	At least 400 (regular reports from CRM system)
16	Stage 5	Deliverable: training programme to build delivery capacity of grant recipients	1
17	Stage 5	Deliverable: facilitation of a successful projects' network for peer support and exchange of good practice	1
18	Stage 5	Deliverable: in-dept support to approved projects with a complex delivery issue	30
19	Stage 5	Output: percentage of grant recipients supported with general queries and at IPMs	100% (grant manager feedback)

11.2 The additional KPIs below are owned by the Authority and will not be used as a direct performance indicator for the Delivery Partner. They have been included for contextual information.

KPI	Delivery Stage	KPI type (deliverable / output/ outcome) and description	Target
1	Stage 4	Outcome: total number of successful project applications.	642
2	Stage 5	Outcome: percentage of projects that have completed their drawdown of COF grant and successfully purchased and renovated the community asset.	90%

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3	Stage 5	Outcome: percentage of projects successfully delivering the intended community benefits and managing a sustainable community business 1 year post drawdown of COF grant.	85%
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**12. SECURITY REQUIREMENTS**

- 12.1 As the bulk of the work for this contract will be delivered working with community organisations at their locations across the UK and virtually, there will be no requirement for Delivery Partner staff to demonstrate security clearance.

**13. PAYMENT**

- 13.1 Payment can only be made following satisfactory delivery of pre-agreed certified deliverables. The full scope of these deliverables will be agreed at inception with the Delivery Partner.
- 13.2 Before payment can be considered, each invoice must include a detailed elemental breakdown of work completed and the associated costs.
- 13.3 Travel and subsistence should be included as part of the Delivery Partner's standard rates.

**14. BASE LOCATION**

The community organisations that will require support are located across the entirety of the UK, so good evidence of UK-wide coverage will be required, and this will likely require travel to all four nations of the UK. DLUHC headquarters are based at 2 Marsham Street, London SW1P 4DF, and meetings may need to be held there on a semi-regular basis.