

## INVITATION TO TENDER

### Terms of Reference for a Big Lottery funded Process Evaluation of The Reader's historic Community-Led *Shared Reading* projects.

<b>Project Title</b>	<b>A Process Evaluation of The Reader's historic Community-Led <i>Shared Reading</i> Groups</b>
<b>Duration</b>	<b>4 months</b>
<b>Expected Start Date</b>	<b>August 2018</b>
<b>To be completed By</b>	<b>November 2018</b>

#### 1. Introduction and Background

The Reader is a dynamic national charity and social enterprise, head quartered in Liverpool. The Reader builds stronger and more supportive communities through the unique model of *Shared Reading*. *Shared Reading* improves emotional wellbeing, social connectivity and builds a sense of purpose for thousands of people across the UK- people like David....

“The reading groups have helped me more than anything else - they are a different kind of medicine and it's through them that I've found a way back into life.”

- David, *Shared Reading* group member, Birkenhead Library

Since 2002, we've been developing our pioneering *Shared Reading* model in old people's homes, community centres, hospitals, addiction rehab units, prisons, public libraries, schools and many other places across the UK. During the sessions, a piece of great literature is read aloud and explored, with the group stopping spontaneously to discuss their immediate responses in a live, shared way. There is never any pressure to read or contribute, and participation is always self-directed. *Shared Reading* group members often describe the experience as helping them to have insight, to build confidence, to share things they often could not easily say. The groups create a safe and calm space in which people feel a sense of community and a connection to themselves and others.

Existing evaluation and research shows that *Shared Reading* can improve wellbeing, reduce isolation and build community and connectedness across the UK and beyond. It is a powerful, replicable model which works for people of all ages, backgrounds and life situations and The Reader is driven by the ambition of making *Shared Reading* part of the fabric of our communities – so, like the Scouts and Guides - wherever you find yourself living, we want a group nearby that you can access.

Currently, just over 400 weekly groups take place across the UK, with the largest concentrations of *Shared Reading* in the North West, South West, North Wales and London. We deliver 53 groups in

32 different criminal justice settings across the country, including all prisons in Northern Ireland and in a range of education settings largely focused in the Liverpool City Region. We mobilise 600+ individuals across the country through social action, with particular concentrations of our volunteers in London, Bristol, Liverpool City Region and in North Wales.

The Reader has collected a substantial range of evidence over the past eight years to demonstrate the impact of *Shared Reading*. We gather both quantitative and qualitative data to measure our impact and we have worked with both Social Investment Business and Nesta to develop our Theory of Change (See Appendix). We constantly refine our monitoring, evaluation tools and analysis and are currently working with Pro Bono Economics to better assess and articulate the economic value of *Shared Reading* to the health sector. Outcome highlights from community *Shared Reading* groups (i.e. not criminal justice or in-patient settings):

- 95% enjoy getting to know new people in the group<sup>1</sup>
- 94% generally feel better after attending the group<sup>2</sup>
- 94% feel relaxed in the group<sup>3</sup>
- 96% feel safe and welcomed in the group<sup>4</sup>

Becoming a Reader Leader has an impact on volunteer's lives, as well as the people they read with:

- 92% say volunteering has improved their wellbeing<sup>5</sup>
- 92% say volunteering has increased their confidence<sup>6</sup>

## 2. About this Project

The Reader is at a pivotal moment in our development and we want to take an organisational leap forward to increase impact. We have recently secured investment from Big Lottery Fund to help us transition from a staff-led delivery model to a new, sustainable model for growth. Our plan is to put *Shared Reading* into the hands of committed, trained volunteers who have the local networks, relationships and passion to set up and lead their own reading communities. We want to draw on the time and talents of many, to create The Reader Movement.

Over the last 18 months, The Reader has been designing and piloting this new model, alongside many of our passionate group members, partners, and commissioners and volunteers. Support from Big Lottery Fund will enable us to build on these foundations and expand to new areas, ensuring we have the digital infrastructure that can help drive recruitment and underpin consistent volunteer support that assures quality and impact. The project's overall aims are to:

- Double The Reader's current provision of *Shared Reading* groups. We will do this by building the capacity of local volunteers to co-ordinate, grow and sustain their *Shared Reading* communities and strong partnership working. We will recruit and support over 750 volunteers, supporting at least 1800 beneficiaries over the three years across the UK.
- Develop The Reader's digital infrastructure, enabling us to attract, recruit, train, motivate

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<sup>1</sup> Out of 330 respondents, April 2016 – March 2017

<sup>2</sup> Out of 410 respondents, April 2016 – March 2017

<sup>3</sup> Out of 330 respondents, April 2016 – March 2017

<sup>4</sup> Out of 327 respondents, April 2016 – March 2017

<sup>5</sup> Out of 39 respondents, September 2016 – February 2017

<sup>6</sup> Out of 39 respondents, September 2016 – February 2017

and support our network of volunteers at scale. This will also streamline monitoring and evaluation and improve connectivity across the network. It will enable The Reader to reach new communities by enabling Shared Reading to take root without local Reader staff presence.

As a key task to kick off this national scaling programme project, we wish to work with an organisation/individual who can conduct a thorough process evaluation of our previous experience training and supporting individuals to deliver *Shared Reading* across the UK. We have trained over 5000 people since 2008 and are currently launching a re-engagement campaign, which will see The Reader reconnect with, inspire and support 120 individuals who have been trained by The Reader since 2008. This re-connected group will be a key audience for the evaluation project.

### 3. Evaluation Specification

To ensure we replicate and grow *Shared Reading* in the most effective way, we want to learn from some of the 5000+ people who have been recruited, trained and/or supported by The Reader previously to understand **what the key barriers and enablers to people achieving successful, high quality *Shared Reading* groups have been.** We anticipate the size of the evaluation population to be approximately 15-100 people.

Within this overarching aim, we expect this evaluation to consider several questions:

- What has enabled *Shared Reading* groups to keep running?
- Are these groups retaining basic fidelity to the *Shared Reading* model? If not, why not?\*
- Are there any local innovations that The Reader can learn from in terms of delivery practices?
- Why do Reader Leaders stop delivering their *Shared Reading* group?
- How satisfied have past *Shared Reading* trainees been with their relationship with The Reader, and what would they like to see change?

*\*We have a series of concise tools which will enable the successful candidate to ascertain whether fundamental aspects of the Shared Reading model are being met.*

Learning from this evaluation will help The Reader create the conditions within which *Shared Reading* communities are most likely to spark, thrive and last moving forwards. It will support us to build more effective recruitment, training and support mechanisms for the thousands of *Shared Reading* volunteers we wish to engage over the next five years.

### 4. Budget

The maximum budget for this Process Evaluation is £18,000 - £20,000 (inclusive of VAT).

### 5. Proposed Approach and Methodology

On appointment, we will expect the successful consultant to work closely with our Monitoring and Evaluation Manager, Associate Director of Operations, National Community Development Manager

and existing *Shared Reading* volunteers to confirm the most appropriate evaluation questions and methodology within the first month of the project. Once the evaluation approach has been agreed with this team, The Reader's Director's Group and Big Lottery, it will be the consultant's responsibility to collect and analyse the data, condensing the findings into a clear, high-quality report that outlines findings and makes a set of clear recommendations for future roll out based on these results. We anticipate the evaluation methodology will involve digital surveys and stakeholder interviews, including face-to-face, online and telephone conversations with a sample of people who have been trained by The Reader since 2008 and have recently given their consent for direct contact.

Four main groups of people will need to be consulted as part of this process evaluation:

- Individuals who have been trained by the Reader between 2008 and 2016\* and stopped delivering *Shared Reading*
- Individuals who have been trained by the Reader between 2008 and 2016, and are still delivering *Shared Reading* with little/no support or engagement with The Reader
- Individuals who have been trained by the Reader and are part of our improved 'Membership' programme of support (developed in 2017) and currently delivering groups
- Individuals who have been trained by the Reader and were part of our improved 'Membership' programme of support but have stopped delivering groups

We will have relevant data and permission from each of these groups.

\*In 2017, The Reader implemented a new 'Membership' programme of ongoing training and support for people who had been trained to deliver *Shared Reading*. Prior to this, the level of engagement trainees had with the organisation varied from weekly contact with an onsite member of Reader staff to little, if any, direct contact.

This project will be overseen by Zoe Gilling, Associate Director of Operations at The Reader, who will report on progress to The Reader's Directors Group, the Board of Trustees and Big Lottery Fund.

## **6. Conditions of Participation**

1. We ask that tenders are no longer than 25 pages. Participants must be able to provide within the application evidence of appropriate experience and expertise in the field of process evaluation including but not limited to:
  - Previous demonstrable experience on a project of a similar type and budget delivered to a high standard
  - Experience of evaluating or working with an organisation developing new programmes and approaches
  - Evidence of the use of appropriate techniques for collecting and analyzing relevant data
  - Creative thinking, problem solving and flexibility skills
  - Strong knowledge of work in this sector
2. Participants must be able to provide evidence that they are a responsible and ethical practice with values in alignment to that of The Reader.

3. Participants must be able to set out how their organisation's data protection policies comply with current legislation.
4. Participants must be able to provide full contact details of two references from previous third sector/community focused clients.

**Failure to fully satisfy any of the conditions described above may result in the disqualification of the tender. All matters of disqualification on these grounds will be communicated to the individual bidder without reasonable delay.**

## **7. Tendering Process**

The deadline for the submission of tenders is **21<sup>st</sup> May 2018 at 12.00pm**. A full electronic copy of the tender including any annexes and supplementary material as part of one document in MS Word or PDF format should be emailed to Zoe Gilling at [zoegilling@thereader.org.uk](mailto:zoegilling@thereader.org.uk)

If, on checking the Tender documents, errors of extension or addition are discovered, the Tenderer will be given the opportunity of confirming their offer and amending the Tender to correct such errors.

Tenderers are required to return the following information;

- i. Suitable evidence to demonstrate that all items for "Conditions of Participation" have been fully satisfied.
- ii. Your understanding of the challenges and potential benefits of this project.
- iii. Introduce a capable and experienced team that can provide all of the skills identified in Section 3.
- iv. Includes a methodology and activity timetable for how the work will be undertaken and completed.
- v. Includes a table showing exactly who will deliver each set of tasks, their day rates and the number of days allowed.
- vi. CV's of relevant staff members as appendices.
- vii. In accordance with the budgeted figure of £18,000 - £20,000, submit a breakdown of costs for works required along with a fixed total fee. Your fee should be itemized and inclusive of all day rates, travel and subsistence expenses, consultation costs and any other administrative costs. Costs should be inclusive of VAT and state whether the VAT is chargeable.
- viii. Evidence of PI cover (minimum of £1 Million for each and every claim). If this is not available they should confirm that they would be eligible to obtain this level of cover if appointed.

- ix. Evidence of Public and Employer Liability Insurance (minimum of £1 Million). If this is not available they should confirm that they would be eligible to obtain this level of cover if appointed.
- x. Any additional services that can be offered separately to the tendered roles and prices for those services where applicable.
- xi. Any omissions, exclusions or qualification items that the Client needs to be made aware of.

Once the deadline for tender submissions has passed the tenders will be scored according to set criteria as follows:

**Price – The price of the tender will be scored and considered at a maximum weighting of 10%.**

**Quality – The quality of the tender will be scored and considered at a maximum weighting of 90%.**

The quality weighting will be broken down accordingly as per the tables below.

<b>Quality</b>  30%	<b>Knowledge (Understanding a Project Brief)</b>
	Does this bid demonstrate the candidate's ability to review and absorb knowledge from a Client brief and how their capability addresses the project needs listed therein?
<b>Quality</b>  30%	<b>Technical (Skills &amp; Resources)</b>
	Does this bid demonstrate the required capability to deliver the project successfully? Have suitable resources, skills and personnel been identified and matched against the project deliverables?
<b>Quality</b>  30%	<b>Capability (Problems &amp; Innovation)</b>
	Does this bid demonstrate the ability to respond to problems encountered on the project? Is there any evidence of innovation or the potential to innovate bringing added value?

**Quality scoring for each criteria item**

<b>Excellent</b>	Exceeds the required standard. Provides relevant information accurately and demonstrates added value.	9 to 10
<b>Good</b>	Meets the standard required. Comprehensive response to information requested.	7 to 8
<b>Acceptable</b>	Meets the standard in most aspects but fails in some areas. Acceptable level of detail, accuracy and relevance.	5 to 6
<b>Limited</b>	Fails the standard in most aspects but meets some. Limited information and partially answered questions.	3 to 4

<b>Inadequate</b>	Significantly fails to meet the standard. Inadequate detail provided and fails to answer questions.	1 to 2
<b>Cannot be Considered</b>	Completely fails to meet the standard. Responses deficient or items missed completed and unanswered.	0

Once scores have been confirmed, the highest scoring tenders will be shortlisted and invited to attend an interview. Once we are satisfied with all of the information presented the final appointment will be made and contracts prepared and exchanged thereafter. If at any stage the highest tender chooses to withdraw their offer, The Reader may opt to make an offer to the next highest scoring tender or repeat the tender process in full.

If you have any queries about the project or the application process, please contact Jennifer Jarman at 0151 729 2200 before Monday 14<sup>th</sup> May 2018.

## 8. Timetable for Appointments

<b>Date</b>	<b>Stage</b>
1 <sup>st</sup> May 2018	Issue of the ITT documents to Candidates
21 <sup>st</sup> May 2018	Receipt of tenders from Candidates
1 <sup>st</sup> June 2018	Review, clarification, shortlisting of tenders
14 <sup>th</sup> June 2018	Interviews with Candidates (subject to change)
18 <sup>th</sup> June 2018	Final evaluation of tenders
21 <sup>st</sup> June 2018	Notification of appointment of successful Candidate
28 <sup>th</sup> June 2018	Appointment of successful Candidate

The Reader reserves the right to amend this timetable as required.