**Client:** **Council of the Isles of Scilly (CIOS) – Climate Adaptation Scilly (CAS)**

**Date: 17 January 2023**

**Area: Invitation to tender for Summative Assessment Project Evaluation Services**

1. **Introduction, background to project in business context**

The Council of the Isles of Scilly is the Accountable Body for the European Regional Development Fund (ERDF), which has part-funded Adaptive Scillies (Climate Adaptation Scilly).

This project sought to expand and rapidly deliver investment in climate change adaptation outcomes, including flood defence and dune management and rainwater harvesting on the Isles of Scilly.

The project originally was delayed because insufficient evidence was available on the extent of the flooding problem, which is the major focus of the project. When subsequently completed in 2019, the evidence from flood modelling suggested the Isles of Scilly was the English District with the greatest proportionate exposure to flood, coastal and climate risks. This has required an appropriate expansion in the scale and form of interventions to manage flood, coastal and climate risks across 4 of the 5 inhabited islands, St Mary’s, St Agnes, Bryher and St Martin’s.

The project scope was funded by ERDF and Flood and Coastal Erosion Risk Management Grant in Aid (FCERM GiA) co-investment (£1.356m). The original outcomes sought were 88 businesses and 45.4ha of designated habitats better protected from flood, coastal and climate risks, as well as 94 households, £8.9m of national flood risk economic benefits and a minimum further £1.5m of local economic, eco-system benefits over the next 25 years.

The formal project outcomes defined in the original Capital Funding Agreement for the ERDF were:

1. Under P6, 88 businesses and properties with reduced flood risk. These commercial properties were defined by analysis of existing flooding extents and flooding extents expected with reduced flood risk following the project’s completion.
2. Under C23, 45.4 hectares of habitats supported to attain a better conservation status. The quantum of this outcome was estimated from the area of restored dunes, designated wetlands, coastal heathland and wet woodland habitats behind the dunes.

An additional outcome defined in the text of the Capital Funding Agreement (page 105) was that 20 businesses would be supplied with rainwater harvesting systems and that this would reduce total volume of groundwater and designated wetland water extraction by 10%.

Following an initial round of tenders for the main structural coastal works, it was evident that the budget was inadequate to achieve the outcomes sought.

Following more detailed analysis of the benefits from the project, an increase in funding of approximately £5.5m was obtained from the Environment Agency FCERM GiA and Local Levy.

The delay that occurred in the project while funding was revised resulted in insufficient time to deliver all the project outcomes funded by ERDF. Particularly, the design and licensing for coastal defence works on the off-islands could not be completed in adequate time to construct there. Subsequently, a change request was made to reduce the C23 outcome to 20 hectares of land protected, which is the land protected on St Mary’s. The P6 outputs remained the same.

The methodology for evidencing and estimating the quantities of these outputs and benefits (during the 25-year benefit period of the economic appraisal) are described in detail and are central to the purpose of the Isles of Scilly Natural Dune Restoration and Coastal Resilience (project) FCERM Outline Business Case (Appendix 1). This original business case (OBC) and its assessment of benefit is based on the completed (and supplied as Appendix 2) JBA Coastal Flood Modelling Report which itself evidences the numbers of households, commercial properties and flood inundation extents.

1. **ERDF Summative Assessment Objectives**

The ERDF grant funding agreement places a requirement on grant recipients to undertake a summative assessment of the funded programme. The summative assessments are intended to provide insights into programme performance, in order to:

* Enhance their implementation
* Provide reliable evidence of their efficiency, effectiveness and value for money
* Provide insights into what interventions work, reasons and lessons for the future

The summative assessments will help to understand the difference the programmes have made in the local economy, communities and beneficiary groups. In addition, they will improve the effectiveness of measures in relation to economic growth in the future.

Council of the Isles of Scilly is now seeking tenders from highly experienced and qualified suppliers for the provision of a summative assessment for the Climate Adaptation Scilly (CAS) programme.

The supplier will be expected to undertake a summative assessment and provide a full report together with a final summary in line with the requirements of this specification and the latest ERDF guidance.

Business growth is delivered by a wide range of outputs evidenced and recorded by the monitoring process.

1. **Programme Objectives and Impacts-**

**The objectives of the project are to:**

1. Improving existing coastal defences. Better protecting the commercial hub of Hugh Town, critical local infrastructure, freshwater habitats and scarce water supplies from saline inundation and intrusion.

Coastal (defence) improvements will be complemented by a demountable barrier to better protect Old Town, wave overtopping of the Mermaid Inn Sea Wall (to better protect Hugh Town), and the provision and distribution of coastal repair aggregate stocks to sustain and improve extreme storm reactive community coastal resilience across the islands. Natural dune restoration will enable islanders (and other stakeholders, including visitors) to develop, participate in, value, communicate about and sustain local expertise in adaptive dune restoration techniques and management.

2. Naturally restoring damaged dunes. Increasing the crest heights and flexible strength of damaged dunes so that they better protect vulnerable properties, infrastructure, freshwater habitats and water supplies across the inhabited islands. This will also enable the dunes to naturally adapt, recessing in response to the coastal effects of climate change while retaining their strength and height.

3. Enhancing local community flood, coastal and climate resilience capabilities and developing and adopting a Climate Change Adaptation Action Plan.

Island communities will be enabled to investigate and develop a shared understanding of the range, scale and potential time-line of uncertain climate change threats, the potential impacts on lives and livelihoods, and implications that they will face. They will be enabled to identify and agree climate change ‘triggers’ and incremental risk management and adaptive resilience actions – and will incorporate these elements into a District-wide Climate Change Adaptation Action Plan. This will provide a supplement to the Council of the Isles of Scilly Local Plan and its Civil Contingency planning. It will be in line with and will deliver the Government’s Community Resilience Development Framework.

4. Reducing extreme water scarcity, over-abstraction stress impacts and surface water and surface water/drainage flood risk to (and from) local enterprises and designated environments. Increases in rainfall variation and over-abstraction related to climate change already are degrading fragile ecosystems, undermining the competitiveness of local businesses and constricting opportunities for sustainable growth within the local economy.

1. **Stakeholders**

Stakeholders that may need to be consulted with during the evaluation process include:

* Climate Adaptation Scilly - delivery team and support staff
* Council Members
* Isles of Scilly Wildlife Trust
* Duchy of Cornwall
* Direct beneficiaries of rainwater harvesting systems
* South West Water
* Environment Agency
* Natural England
* Historic England
* Managing Authority (DLUHC)

1. **Scope of Assessment**

The supplier will be expected to undertake a programme evaluation and provide a final summative assessment report together with a summary report in line with the requirements of the ERDF summative assessment guidance and further requirements noted within quotation document. As noted in the timeline (section 14) – a draft report will need to be provided by **31st March 2023**, and the final report by **30th June 2023**.

Primarily, the summative assessment is about understanding the experience of implementing the ERDF project, the impact the project has had, whether it has provided value for money, and the lessons which can be learnt from the experience.

While the approach to collecting information and the type of analysis within each summative assessment may vary depending on the scale and nature of each ERDF project, all assessments need to cover the following themes:

**1.** **Relevance and consistency:** the summative assessments must explore the continued relevance and consistency of the project, in light of any changes in policy or economic circumstances during its delivery period**.**

**2.** **Progress:** the summative assessments will set out the progress of the project against contractual targets, any reasons for under or over performance, and the expected lifetime results

**3.** **Delivery and management:** the summative assessment must explore the experience of implementing and managing the project and any lessons which have emerged from this

**4.** **Impacts:** the summative assessment, where possible, must show the economic impact attributable to the project, including both the intended and actual outcomes and impact

**5.** **Assessing value for money:** the summative assessments must analyse the cost-effectiveness of the project in light of its intended and unintended outcomes and impacts, and hence its value for money.

As noted in ERDF Programme Summative Assessment Guidance ESIF-GN-1-034 – Appendix F, the final summative assessment report will need to cover each of the above themes. From this guidance, CAS have listed here with (Sections 1 – 5) the key areas and questions relevant to our programme together with specific insights which must form part of this assessment.

Suppliers are encouraged to be innovative in their proposals and design of the assessment to reflect the nature of the programme, suggesting any additional insights and added value they may be able to provide.

1. **Summative assessment final report structure**

**Introduction**

This section should provide an overview of the project including timescales, overarching objective(s) and who the main project partner(s) is(are).

It should also outline the research design and evaluation methodology of the summative assessment. The section should elaborate on why a particular methodology was chosen and the research questions used. It should then describe the method(s) used for collecting data and how this data/evidence was analysed against the research questions. The section should also include a critical discussion on how appropriate the evaluation methodology was overall to the particular project and any challenges encountered in the research process.

**Section 1: Project context**

* 1. This section needs to consider the economic and policy context in which the project was designed, including the nature of the market failure, the project objectives and the rationale for the delivery approach. This section should be based around the project logic model and include critical analysis about the appropriateness of the project delivery design given project objectives. This section should be based around the project logic model and include critical analysis about the appropriateness of the project’s design given its objectives.
  2. Drawing on the available evidence, this section should discuss whether there has been a change in this context and whether it has any implications for the practical delivery of the project and the benefits which could be realised for beneficiaries and the local economy as a whole. The key questions that need to be explored here are:
* What was the project seeking to do?
* What was the economic and policy context at the time that the project was designed?
* What were the specific market failures that the project was seeking to address? Was there a strong rationale for the project?
* Was it appropriately designed to achieve its objectives? Was the delivery model appropriate?
* Were the targets set for the project realistic and achievable?
* How did the context change as the project was delivered and did this exert any particular pressures on project delivery?
* Bearing in mind any changes in context or weaknesses in the project design / logic model, can the project reasonably be expected to perform well against its targets?

**Section 2: Project progress**

2.1 This section should consider the progress with the implementation of the project, drawing in particular on annual and lifetime performance against the expenditure, activity and output targets. Variations from the targets should be carefully explained and supported by the available evidence. Progress against any horizontal principals and any explicit targets which were set should also be considered.

2.2 The key questions here are:

* Has the project delivered what it expected to in terms of spend and outputs?
* What are the factors which explain this performance?
* When the project draws to a close, is it expected to have achieved what it set out to?

2.3 As the summative assessment may be conducted prior to the completion of the project, it would be appropriate in these instances to forecast the expected lifetime outturn for the project and the assumptions which underpin the analysis. If this is the case, it is important that there is a clear distinction between the outcomes and impacts which have actually been realised and those which are predicted to arise in future years. For quantitative forecasting, the estimation method will need to be clearly explained.

2.4 This section of the report must include a Spend and Output table (Table F.1) using all of the relevant indicators for the project. This table format must not be adjusted in any way as it forms the basis of the Summary Template (ref ESIF-Form-1-014).

**Section 3: Programme delivery and management**

3.1 This section of the summative assessment will need to provide a more qualitative analysis of the implementation of the project. This should include procurement, selection procedures, delivery performance, governance and management. It needs to consider the elements of project delivery which have gone well and, if necessary, the elements which have gone less well.

3.2 The key questions that the summative assessment will need to explore here include:

* Was the project well managed? Were the right governance and management structures in place and did they operate in the way they were expected to?
* Has the project delivered its intended activities to a high standard?
* Could the delivery of the project have been improved in any way?
* For projects with direct beneficiaries: did the project engage with and select the right beneficiaries? Were the right procedures and criteria in place to ensure the project focused on the right beneficiaries?
* How are project activities perceived by stakeholders and beneficiaries? What are their perceptions of the quality of activities / delivery?
* To what extent have the horizontal principles been integrated into and shaped delivery?

**Section 4: Programme outcomes and impact**

4.1 The analysis here will need to set out the progress that the project has made towards outcomes and impacts set out in the project logic model. It will need to provide an analysis of the gross and net additional economic impacts (see Appendix C). It will be particularly important here to ensure that the analysis provides forecasts of lifetime outturns. This section should also provide conclusions about the contribution that the project has made to any ERDF programme result indicators which are identified as relevant to the project.

4.2 The overarching question that this section will need to explore is whether or not the project has made a difference. In answering this critical question, projects will need to consider:

* What progress has the project made towards achieving the outcome and impacts set out in its logic model?
* To what extent are the changes in relevant impact and outcome indicators attributable to project activities?
* What are the gross and net additional economic, social and environmental benefits of the project (where relevant and applicable to project activities)?
* Can these benefits be quantified and attributed to the project in a statistically robust way?
* To what extent has / will the project contribute to the achievement of ERDF programme result indicators?
* What are the main sources of Strategic Added Value that the project has created?

4.3 The summative assessments should try to use the type of standard table format illustrated below for reporting the total aggregate gross and net additional impacts achieved, clearly specifying the time period covered and the impacts areas used. Additional columns and rows can be added for additional impact areas and indicators, as appropriate. A similar format can be used for predicting any expected future impacts if this is appropriate, although the basis for these estimates will need to be clearly stated, including the period over which impacts or outcomes are expected to occur and the reliability of the estimates.

**Section 5: Programme value for money**

5.1 Drawing upon the analysis in the impact assessment section, this section of the summative assessment report will need to provide a clear analysis of the value for money that the project has provided. The summative assessments should also come to a conclusion on whether the project presents good value for money or not. This will need to be benchmarked against other similar interventions if reliable comparable data is available.

5.2 Various methods can be used to assess benefits and costs of an intervention from the perspective of society or government which has helped to fund the activity. The Green Book provides a fuller explanation of these methods.

5.3 As a minimum, summative assessments should provide cost per output analysis. Where appropriate this can also be supplemented by benefit cost ratio analysis to provide additional insight. The value for money analysis should be produced based on multiple cost bases (i.e. total public sector costs, ERDF grant, total project costs) to increase its usefulness for different audiences. The weight that can be placed on the findings relative to the robustness of the approach should also be clear in the summative assessment.

**Section 6: Conclusions and lessons learnt**

6.1 It is difficult to be prescriptive about the content of the conclusions section of the report as these are naturally driven by the characteristics of particular projects, the priorities of grant recipients and the analysis contained within the rest of the summative assessment report. It is suggested that the conclusions are structured around identifying the strengths and weaknesses of the project. They should also highlight specific lessons for the following audiences:

* The grant recipient / project delivery body
* Those designing and implementing similar interventions
* Policy makers
  1. The conclusions must be objective and constructive and wholly evidenced by the analysis within the summative assessment report.

**Approach**

Suppliers are encouraged to propose a range of methods in their quote to evaluate the programme in line with 6. Scope of Assessment above and the ERDF guidance. Methods must be in line with industry recommended best practise for this nature of assessment such as theory-based and/or counterfactual impact evaluation (CIE) or other industry-recognised or innovative methods. Suppliers are expected to include a degree of programme beneficiary interviews and case studies to ensure meaningful and relevant information and conclusions.

Suppliers will need to justify their proposed approaches, being particularly mindful of feasibility. For instance, the scope and timings of the programme may pose challenges to the use of comparison groups. Suppliers should consider whether comparison groups could be identified and how this would be done.

Within the proposal, suppliers will also need to demonstrate that they have taken into account:

* The scope and nature of the programme
* The characteristics and support of local economy
* The timings of the programme and summative assessment deadline and resources

**CAS will provide the evaluator with the following information for the formal evaluation**:

* CAS application for funding, Funding agreement and details of material changes
* All relevant monitoring and project progress information
* A full list of SME beneficiaries of the rainwater harvesting component of the project, including details of what rainwater harvesting systems they received
* Staff involved with project set up delivery
* Summative Assessment Logic model- complete in the start of the Extension programme
* Summative Assessment Data Monitoring Form – up to date
* Summative Assessment Plan -complete in the start of the Extension programme

1. **Accounts Management**

The supplier relationship will be managed by key members of the CAS programme.

Due to the short timescales, the supplier will be expected to provide regular progress updates every 2 weeks with the Programme Director. Our preference would be for meetings to be incorporated at key points of the study. This should include initiation meetings in addition to regular progress updates as required.

The supplier should provide a dedicated supplier point of contact to oversee the summative assessment, with overall responsibility for any issues.

The supplier will be expected to provide a project plan and timeline as part of their tender response, outlining roles and any significant requirements from the CAS team, in order to initiate the summative assessment as soon as possible.

**10. Quality Assurance**

A minimum standard of quality and consistency must be achieved in line with industry best practise and ERDF summative assessment guidance.

Evaluators must be independent of the programme with appropriate expertise, qualifications and experience, including any subcontractors. Suppliers will need to demonstrate and ensure a professional code of conduct at all times, in particular in communications and surveys with beneficiaries and key stakeholders.

**11. Confidentiality**

Evaluators will be acting on behalf of CIOS and CAS as Data Processor and must demonstrate knowledge and adherence to the latest Data Protection legislation which includes, crucially, returning and/or deleting personal data when the service ends.

The supplier will need to comply with the requirements of the ERDF summative assessment guidance and the Data Protection Act (and new GDPR 2018 as applicable) in relation to Confidentiality and use of business and personal data. The supplier will be expected to work with CAS to ensure compliance with DPA and GDPR. Key considerations the supplier will be expected to incorporate in their approach:

* Are there any constraints on data collection and they can be avoided?
* How will the data be stored and are there any data protection issues?
* Returning and/or deleting personal data when the service ends

Given the different stakeholders that will be interested in the findings of this assessment, the supplier will be expected to provide a method of ensuring anonymization of personal data, potentially providing 2 sets of reports and information, including an executive summary that could be used for different audiences.

**12. Budget**

The budget for the evaluations is up to a maximum of £20 000 plus VAT, which is determined by ERDF Guidance as a fixed proportion of the CAS budget.

**13. Contract and Invoice Requirements**

Winning tender will be awarded through a services contract.

Please see the services contract attached in Appendix 2 to familiarise yourselves with contract and services requirements

**14. Timeline**

The Summative Assessments need to be provided no later than the 30th June 2023. Evaluators must therefore provide their findings and draft summative assessment report to Climate Adaptation Scilly by the end of March in accordance with the below schedule. Suppliers are also required to present an interim progress report by the end of April in addition to fortnightly progress updates:

* Initial advert : **17th January 2023**
* Tender close date: **7th February 1700**
* Notification of successful supplier and issue of contract: **8/2/2023**
* Contract start and Initiation Meeting: Week commencing **9/2/2023**
* Draft report:  **31/3/ 2023**
* Final Report and Summary - ready for submission to DLUHC: **no later than 30th June 2022**

**15. How to respond to this brief**

Please indicate your interest in the tender by e-mailing the below contact to register your interest and ensure you receive a copy of any additional questions and answers to date.

All tenders for evaluation need to be submitted before **7th February 2023 (1700)** by e-mail with title Tender for Summative Assessment Project Evaluation Services- Council of the Isles of Scilly (CIOS) – Climate Adaptation Scilly to [procurement@scilly.gov.uk](mailto:procurement@scilly.gov.uk)

Please complete the Supplier Questionnaire and provide a Proposal as requested in Annex 1.

Any clarifications requests must be sent in writing by e-mail to the below contact.

**Contact Details: Senior Officer: Capital Development and Procurement**

**Email:** [**procurement@scilly.gov.uk**](mailto:procurement@scilly.gov.uk)

**Address:**

Climate Adaptation Scilly

Porthmellon Enterprise Centre

St Mary’s, Isles if Scilly

TR21 0JY

**Suppliers must confirm their expression of interest in this quotation process by e-mailing the above contact to ensure you receive any further information and clarifications.**

# 16. Evaluation process-

Stage 1: Quote proposal stage

* In response to this Invitation to quote document, please complete the Supplier Questionnaire and provide a Quote Proposal as requested in Annex 1.
* Quotation submissions will be scored against the criteria on the next page.
* The contract will be awarded to the Most Economically Advantageous Tender (MEAT) on the basis of price to quality (75:25).

**Scoring**

Qualitative responses will be evaluated according to the following assessment criteria and weightings:

|  |  |  |
| --- | --- | --- |
| **Comment** | **Judgement** | **Marks available** |
| Meets the requirements fully | Excellent | 5 |
| Meets the requirements substantially but not completely | Good | 4 |
| Meets half or more of the requirements but not all. | Satisfactory | 3 |
| Meets some of the requirements but fails to meet more than half | Unsatisfactory | 2 |
| Substantially fails to meet the requirements but meets some or meets some in part | Poor | 1 |
| Does not meet the requirements at all | Failed | 0 |

|  |  |  |
| --- | --- | --- |
| **Criteria and Weightings** | **Score** | **Total Weighting (Max)** |
| **Section A: Supplier questionnaire** | Pass/Fail | N/A - Pass / Fail |
| **Section B** |  |  |
| **Experience, Staff Resources: 7.5%.** Outline staff experience and previous examples of similar activity. (1 side A4)  **Timescales and Project Management: 7.5%.** Provide a detailed project plan necessary to deliver the project on time |  | 15% |
| **Methodology and Approach: 10%.** Including Quality and Code of Conduct, Understanding of Context, Relevance to Programme, stakeholder management  **Confidentiality and Use of Personal Data: 10%.** (Max 1 side A4), font size 12 |  | 10% |
|  |  |  |
| **Pricing 75%**: \*Price scoring will be based on total price for the contract in comparison to other tendered prices. Scoring will be based on standard relative methodology, whereby the lowest priced bid is divided by the score of the bid being evaluated, multiplied by the maximum weighting.  (Max 1 page, font size 12, excluding separately Excel Pricing spreadsheet) | Score - see notes\* | 75% |
| **Total** |  | 100% |

**Suppliers must adhere to the page limits set as indicated above and within Section B and tenders must be submitted in Font size 12. Any responses beyond the specified page limits will not be taken into account.**

CIOS have the right to withdraw from the quotation process at any time prior to signing the contract. CIOS will not be liable for any expenses incurred by suppliers during the quotation stage or for attendance of meetings / presentations during the quotation stage.

***(Annex 1 – Section A Supplier Questionnaire and Section B Quotation Proposal below)***

**Section A – Company Information:**

|  |  |
| --- | --- |
| Supplier Questionnaire – Company Information |  |
| 1. Full company name |  |
| 1. Registered Address (and local / branch address where applicable) | Registered Address:  Local address (if applicable): |
| 1. Contact details for this quote (name, role, telephone number and e-mail address) |  |
| 1. Company registration number   (NB CIOS will carry out a risk-based financial check on the company in line with latest procurement guidance. CIOS may request further financial information where required. CIOS may request additional financial information where required such as recent sets of accounts and further information as applicable) |  |
| 1. Date of company formation: |  |
| 1. VAT registration number: |  |
| 1. Public and professional liability insurance: Please provide a copy of your public and professional liability insurance. | Attached: Y/N |
| 1. Acceptance of CIOS Terms and Conditions: - Please confirm acceptance of our Terms and Conditions as attached (Appendix 2). |  |

**Section B**

**1. Staff Resources and Experience - 7.5% weighting**

Please confirm ability to meet the resource requirements specified within the brief, including attendance of any progress meetings (face to face and remote meetings where applicable).

Within your response, please detail the proposed staff resources and account management structure dedicated to the contract, confirming the roles and names of all staff involved in the project and any aspects of the service which may be provided or managed by third parties / subcontractors. Suppliers should confirm experience and qualifications of the staff involved in delivering the contract (CVs may be appended), including the project manager and all other staff.

Suppliers should confirm availability and capacity of the team to support the timescales required. *(Max Page Limit below).*

**2. Timescales and Project management - 7.5% weighting**

Please provide a proposed timing and project management plan for the summative assessment to show activities, key milestones, personnel responsible and how you will and work with CIOS to undertake the summative assessment within the required timescales. Please confirm how you will ensure successful management of the project and identify any project risks that may impact timescales or assessment. Where possible, please also detail points where significant input is anticipated at this stage from key stakeholders. *(Max Page Limit below).*

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Questions 1 – 2: Max 10 Pages (total 10 pages to cover all 3 questions) - Font Size 12, excluding any CVs which may be appended separately.**

**3. Approach and Methodology - 10% weighting**

Please explain your approach and methodology, ensuring your proposal covers each of the areas of the summative assessment report as described in Section 8 – 9 of this brief, including:

* Section 1 - Programme context: Design, Relevancy and consistency
* Section 2 – Programme Progress
* Section 3 – Programme Delivery and Management
* Section 4 – Programme Outcomes and Impact
* Section 5 – Programme value for money
* Section 6 – Conclusions and lessons learnt
* Effectiveness of Processes and Activities
* SME Growth Journey and Engagement
* Lessons for the Future

Within your response, please also address the following areas:

* What methods might be appropriate to attribute change to the programme? What are the advantages and disadvantages of these approaches?
* What are the limitations of the evaluation design and potential caveats to be applied to the findings?
* Please provide a risk assessment for undertaking the evaluation and detail how you will manage the risks.
* Given the time constraints of the assessment, how will your approach measure the outcomes and impacts and timings over which these materialise?
* How will you ensure consistency and quality of data in your approaches?
* What range of data sources are you likely to employ?
* How many enterprises do you anticipate being contacted to ensure an adequate sample?
* Are there any wider direct and indirect impacts that may provide additional insights into the added value of the programme?
* Quality and Code of conduct – Please confirm your commitment to ensuring a professional code of conduct at all times, in particular with regard to communications and surveys with beneficiaries and key stakeholders undertaken by staff and third parties.

Within the response, suppliers must demonstrate understanding of the programme and context and propose relevant and feasible methodology as appropriate.

As noted in the brief, suppliers are encouraged to be innovative in their proposals and design of the assessment to reflect the nature of the programme, suggesting any additional insights and added value they may be able to provide. *(Max Page Limit below).*

**4. Confidentiality, Use of Data and Findings -Not scored**

Suppliers should provide a response to the requirements listed in Section 12 of the brief in relation to Confidentiality and Use of Personal data. Within your response, please also address the following questions and issues:

* Are there any constraints on data collection and they can be avoided?
* How will the data be stored and are there any data protection issues?
* How will you work with CIOS to ensure the requirements of data protection are met, bearing in mind the need for CIOS to share certain findings of the summative assessment with different stakeholders?
* Returning and/or deleting personal data when the service ends. *(Max Page Limit below).*

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Questions 4 – 5: Max 12 Pages (total 12 pages to cover both questions) - Font Size 12**

**5. Pricing - 75% weighting**

Please provide total costs for provision of the Project Evaluation, including:

* Total cost for undertaking the evaluation and provision of the summative assessment final report and summaryincluding interim reports, progress meetings, expenses and all other costs
* Please provide a detailed breakdown of all costs including:
* Daily rates and number of days for all staff that may be assigned to the contract
* Any third-party costs (if applicable)
* Expenses, travel and any other costs

Please attach a detailed price breakdown in an Excel spreadsheet.

**Please note:**

* Financial pricing sheet and all other cost details must be enclosed in a separate closed and labelled envelope
* The maximum budget for the summative assessment is £20K plus VAT (including all expenses and associated costs) – any bids over this amount will be disqualified.
* Suppliers will be responsible for ensuring costs remain as agreed within their quotation response and final written contract and will need to work within the budget as specified – CIOS will not be liable for any additional costs / expenses unless included in the tender and agreed in writing.

**MAXIMUM SUPPLIER RESPONSE PAGE LIMIT:**

**Question 7: Max 1 Page, Font Size 12, plus separately attached Excel Pricing spreadsheet.**

**Attachments to this document:**

* Appendix 1

ESIF Form 1-014 – Summative Assessment Report Summary

ESIF- Form 1-012 ERDF Summative Assessment Plan Form 1

* Appendix 2 – CIOS Services Contract Terms and Conditions
* Supplier Q and A clarifications and further information may be issued during the tendering period where applicable – all suppliers must register an expression of interest to receive this additional information as per instructions and contact details noted earlier.

*(End of document)*