SOCIAL ENTERPRISE EXCHANGE
INVITATION TO TENDER

PROJECT MONITORING AND EVALUATION

1. Project Summary

Social Enterprise Exchange (SEE) is a comprehensive programme of social enterprise support contributing to jobs, growth and social inclusion across the Sheffield City Region (SCR). It is delivered by a community-based consortium in collaboration with Sheffield City Region Growth Hub and is part funded by the European Regional Development Fund 2014 - 2020

Social Enterprise Exchange will promote social entrepreneurship, through awareness raising events, knowledge exchange and peer networking; it will provide support for start-ups, including hot-desks, start-up grants and mentoring; and it will offer specialist enterprise support for existing social enterprises to grow and to develop new products and services.

Within the Social Enterprise Exchange programme, Community Media Solutions (CMS) is responsible for commissioning external independent monitoring and evaluation. The external evaluator will report to the Project Management Group of the SEE partnership.

Selection of and support to the external evaluator will be provided by an evaluation sub-group of the Project Management Group. The deliverables for the external evaluation will consist of interim reports in June 2017 and June 2018 and a final report in June 2019.

2. Specific objectives of the SEE

A. Increased awareness and understanding of social enterprise in the SCR including having particular regard to access and opportunity for disadvantaged communities.

Indicators:
- number of individuals participating in project activities
- number of individuals participating that gain increased awareness/understanding
- number of individuals participating that are from disadvantaged communities

B. Establishment of new social enterprises in the SCR, including independent start-ups, charities establishing new trading arms and public sector spin-outs.

Indicators:
- number of social enterprise start-ups benefiting from project assistance
- number of new f.t.e. jobs created within new social enterprises assisted
- number of social enterprises assisted delivering social or economic impact

C. Sustainable growth of existing social enterprises in the SCR including those with high growth potential and larger social enterprises with capacity to expand.

Indicators:
- number of existing social enterprises benefiting from project assistance
- number of new f.t.e. jobs created within existing social enterprises
- number of social enterprises increasing their social or economic impact

A summary presentation is available at http://www.slideshare.net/socentxchange

3. Scope of the procurement

The external independent monitoring and evaluation will be structured in three levels:

Results-oriented monitoring – based on the relevant top-line Investment Priorities for Priority Axis 3 of the ERDF Operational Programme 2014-2020[1] and the specific objectives and associated indicators for the SEE project described in Section 2 above.

Output monitoring – based on ERDF output targets for the project and using the ERDF Output Indicators Definitions Guidance (ESIF-GN-1-002, Version 1, 23 September 2015)[2].

Process monitoring – based on the full programme of activities to be delivered by the partners, including awareness raising activities as well as business support, and evaluated from the perspectives of their relevance, efficiency, effectiveness and sustainability.

The selected contractor will undertake both formative and summative evaluation to ensure lessons are learnt during the project delivery that can contribute to continual improvement. As well as addressing the results, outputs and processes the external evaluator will pay particular attention to a set of key themes in social enterprise, which are likely to include:

Supply Side – Growth Hub, project Delivery Partners and other service providers
- Development of the social enterprise support ecosystem – including interactions with other service providers outside the project partnership (e.g. Growth Hub, Key Fund)
- Models for cross-sector collaboration – leveraging the contributions of the voluntary and community partners, public sector stakeholders and the private sector

Demand Side – individual, social enterprise and community beneficiaries

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[1] Available at https://www.gov.uk/government/publications/draft-european-regional-development-fund-operational-programme-2014-to-2020
[2] Available at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/577016/ESIF-GN-1-002_ERDF_Output_Indicators_Definition_Guidance_v3.docx

- Progression pathways – transitions from community action and engagement to economic activity, including learning, volunteering, employment and business creation
- Development of innovative investment models and business strategies - such as crowdfunding, e-commerce and other appropriation of digital information technologies

The external evaluation will be conducted according to terms of reference that are consistent with European Commission and DCLG guidance and the evaluation evidence will be made available to DCLG (and its appointed external evaluation consultants) to feed into strategic level evaluation of the ERDF Operational Programme 2014-2020.

Beneficiary data provided for the purposes of monitoring and evaluation will be collected in accordance with the Data Protection Act so that it may be passed on where appropriate for external monitoring and evaluation purposes.

The evaluation will ensure sufficient transparency of methodology, calculation, sampling, survey questions and sources of monitoring data used that the data analysis can be reproduced for the purpose of strategic level evaluations by DCLG.

3. Conditions of tender

Responses will be rejected if the supplier:

(i) Agrees with any other person that the other person will refrain from making a response;
(ii) Has directly or indirectly canvassed any member, officer or representative of the Social Enterprise Exchange consortium for acceptance of the proposal;
(iii) Fixes or adjusts the price shown by or in accordance with any other person or by reference to any other response;
(iv) In connection with the award, commits any offence under the Bribery Act 2010 or gives any material fee or reward which is not declared within the proposal

Any queries concerning the Invitation to Tender must be made via the dedicated e-mail address for this tender: tenders@socentxchange.net

Any communication made directly with staff of Community Media Solutions or any other SEE delivery partner will result in your bid being rejected.

CMS is not bound to accept the lowest price, or any response, and reserves the right to accept any part or none of the response.

The Social Enterprise Exchange partners have a formal protocol for dealing with potential conflicts of interest including a declaration and register of interests that all members of the committee dealing with the procurement process are required to complete.

If circumstances arise where CMS receives a request for further information from one or more interested parties, the response(s) will be made available to all interested parties and posted on the tenders page of the project website.

4. Tender Value

The maximum tender value for the external evaluation is £15,000 (including VAT). Contracts for the work will commence April 2017 and end June 2019.

5. Selection criteria

All tenders will be required to demonstrate that they sufficiently meet the following gateway selection criteria to demonstrate their capability to deliver the services offered:

(i) Relevant qualification and/or at least 3 years equivalent experience
(ii) Availability for the period 1 April 2017 to 30 June 2019
(iii) Ability to provide a reference from at least two 2 previous customers

6. Award criteria

Selected proposals will be awarded on the basis of Most Economically Advantageous Tender and responses will be evaluated using the criteria/weightings set out below.

Please note the Social Enterprise Exchange consortium is not bound to accept the lowest priced or any of the submitted proposals.

Item No	Essential Criteria	Gross Score
C1	Proposed method demonstrating understanding of the purpose and scope of the evaluation	20
C2	Qualifications and/or previous experience of project evaluation demonstrating sufficient knowledge and understanding	20
C3	Familiarity with social enterprise and/or business support demonstrating awareness of context specific issues	20
C4	Price based on day rate inclusive of VAT	20
C5	Capacity to deliver over the timeframe required	20
	Total maximum score	100

6. Return of tender responses

All tenders should be sent by email to tenders@socentxchange.net

The tender schedule is as follows:

Invitation to tender advertised	23 February 2017
Deadline for queries	13 March 2017
Return of tender responses	27 March 2017
Interviews	3 April 2017
Notification of decision	5 April 2017
End of standstill period	15 April 2017

<u>The deadline for receipt of proposal is 12.00 noon on 27 March 2017</u>

Please include all the information in your tender response below:

Contact information	Name and main contact details of provider including registered address, email, telephone plus business name and website where applicable.
Business status	If the tender is from a business please provide date of incorporation, company registration number and number of years trading.
Track record and experience	Please provide the name(s) and CV(s) of the individual provider(s) who are proposed to undertake the work as external evaluator. Please focus, in particular, on experience of similar monitoring and evaluative work.
Method	Provide a summary of how you would undertake the monitoring and evaluation. You should focus on the requirements of Section 3 above.
References	Please provide contact details for at least two referees who are familiar with your work, including name, address, email and telephone
VAT	If you are registered for VAT please provide VAT registration number.
Price	Please provide price per day inclusive of VAT (if applicable) and a breakdown of the number of days proposed. Explain why this represents good value for money and include any value added components.

7. Contractual arrangements

SLA	Service provider would operate under an SLA with CMS including a detailed specification of the work required and a payment schedule.
Payments	Schedule based on deliverables and will require: business invoice, completed reports, evidence of meetings attendance
Audit requirements	CMS is required to maintain evidence relating to the financial and non-financial aspects of the SEE project and will retain original copies of invoices and other evidence for the extended life time of this project