**Tender Brief**

**Longitudinal Evaluation & Summative Assessment**

**Cultivator Phase 2**

**January 2020**

Creative Kernow

Krowji

West Park

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www.creativekernow.org.uk

**Tender Specification**

Creative Kernow is inviting tenders for the Longitudinal Evaluation and Summative Assessment of its Cultivator Phase 2 programme.

**Background**

Cultivator Phase 2 is a three-year programme (2019-2022) providing business and skills support to creative industries SMEs in Cornwall and the Isles of Scilly. The programme is funded by the European Regional Development Fund (ERDF), the European Social Fund (ESF), Arts Council England (ACE) and Cornwall Council. It follows on from the very successful Cultivator Programme (2016-2019). Administratively the ERDF funded portion of the Cultivator Phase 2 Programme (business support) is a new programme, whereas the ESF funded portion (skills development) is a continuation of the previous programme.

Cultivator Phase 2 will work alongside the C&IoS Growth Hub and generic business support provision to deliver bespoke and highly specialist coaching, mentoring and targeted investment to build capacity and maximise the growth potential of the creative industries.

Cultivator Phase 2 will also provide tailored provision of relevant, advanced skills for Cornwall’s creative industries sector SMEs. It will develop existing and new partnerships with the FE and HE sectors and support sector specific information advice and guidance, mentoring, sector-relevant skills provision, internships and other activities that provide opportunities for improving industry relevant experience and skills.

Overall project management and delivery of the Cultivator project will be undertaken by Creative Kernow. There are four additional delivery partners Cornwall College Group, the University of Plymouth, The Real Ideas Organisation (RIO) and Cornwall Development Company.

Further details of the activity & contracted outputs in the Cultivator Phase 2 programme can be found Appendix 1.

**Objectives**

The longitudinal evaluation & summative assessment of the Cultivator Phase 2 programme must serve three key purposes:

1. They must provide a holistic and independent review of the effectiveness of the Cultivator Phase 2 Programme which will inform and help improve current and future delivery.
2. They must satisfy the contractual requirement of the ERDF funding to ‘undertake a *summative assessment*’ and generate a final report that is high quality and will help inform evaluations of the national programme.
3. They must provide sufficient qualitative evidence and measurements of success with regard to the impact of Cultivator Phase 2 on SME clients - to satisfy the requirements of Arts Council England.

With this in mind, the key objectives of the longitudinal evaluation & summative assessment will be to:

* Provide recommendations for future activity & delivery and / or a succession plan.
* Identify lessons learned
* Provide qualitative evidence and measurements of success in regard to the impact on SMEs
* Identify whether the programme was relevant for the local context (economic & policy)
* Identify whether contracted performance targets (spend & output) have been achieved
* Demonstrate the economy, efficiency and effectiveness with which the project was delivered
* Identify whether the expected outcomes and impacts of the programme have been delivered
* Assess the programme value for money

The key internal and external audiences for the longitudinal evaluation and summative assessment will be:

* External: Key stakeholders including (but not limited to) the Ministry of Housing, Communities & Local Government (MHCLG), the Department of Work & Pensions (DWP), ACE, Cornwall Council and the members of the programme’s Project Advisory Group. Their interest will be in understanding to what extent the programme achieved the intended results and provided value for money as well as learning about the wider benefits of the programme.
* Internal: All the project partners who delivered Cultivator Phase 2. Their interest will be in lessons learned for the ongoing delivery of the programme, lessons learned for future activity, demonstrating capability and value for money internally & externally, generating case studies and gaining useful economic insights for internal and external use.

Suppliers are encouraged to be innovative in their proposals and design of the evaluation & assessment to reflect the nature of Cultivator Phase 2 and to suggest any additional insights and added value they may be able to provide.

**Specific requirements & deliverables**

Creative Kernow require an **interim** and a **final evaluation report** on the *whole* Cultivator Phase 2 programme. A **Summative Assessment Report (SAR) & SAR Summary** (for ERDF reporting purposes) are also required.

The **interim** and **final reports** should provide a holistic and independent review of the efficiency & effectiveness of the Cultivator Phase 2 Programme. In doing this they should include commentary on delivery mechanisms and both quantitative and qualitative evidence and measurements of success in relation to client satisfaction as well as the management of the programme and progress against programme activity targets (internal) and contractual output targets. They should also collate information on the impact of aligning ERDF & ESF funded activity and include an assessment of the added value gained. The interim report should include recommendations for the ongoing delivery of the programme and the final report should include recommendations for future activity & delivery and / or a succession plan.

The **SAR & SAR Summary** should comply with the current ERDF published guidance on summative assessment. This guidance document (ESIF-GN-1-33) and its appendices can be accessed via the following link and tenderers should familiarise themselves with the documentation and the key requirements of the summative assessment: <https://www.gov.uk/government/publications/evaluation-of-the-european-regional-development-fund-2014-to-2020>

Specific details of the ERDF requirements are as follows:

1. **ESIF-GN-1-011 – ERDF Summative Assessment Logic Model**

The basis of the assessment is taken from the programme-specific logic model, completed as part of the ERDF funding application process in 2019. The successful tenderer will be required to refresh this logic model as appropriate, to maximise relevance (Appendix 2: Cultivator Phase 2 Logic Model)

1. **ESIF-GN-1-034 – Summative Assessment Plan**

The successful tenderer will be required, in conjunction with the Cultivator team, to produce a Summative Assessment Plan to ensure that the necessary research for the summative assessment can be conducted within the relevant timeline and available budget. Cultivator is required to submit the Summative Assessment Plan to its Managing Authority by 13th April 2020. Guidance on the Summative Assessment Plan can be found in Appendix B of the Summative Assessment Guidance (link above) and the Summative Assessment Plan Form (ESIF-Form-1-012) is available from the managing authority.

1. **ESIF Form 1-014 – Summative Assessment Report & Report Summary**

A final SAR must be accompanied by a *summary* which should be produced using a standard template (ESIF-Form-1-014) which is available from the managing authority.

The summative assessment aims to understand and articulate the experience of delivering an ERDF programme and identify the impact of the programme, consider its value for money and lessons learned. As described in the ERDF guidance (link above), all assessments will need to explore the following key themes:

* Relevance and consistency of the programme and appropriateness of programme design – taking into account any changes in policy or economic circumstances during its delivery period
* Progress of the programme against contractual targets – any reasons for under / over-performance and expected lifetime results.
* The experience of delivering and managing the programme – including lessons that emerge
* The economic impact attributable to the programme – including both intended and unintended impacts
* The cost effectiveness of the programme and considering its impact and its value for money

Tenderers should consider how best to quantify the counterfactual, bearing in mind the type of programme, the potential difficulties in sampling and the budgetary & time constraints. They should present their approach in their proposals.

**Timeline, milestones and payment schedule**

Cultivator Phase 2 runs until 30th September 2022, the following milestones should be included in the timeline:

1. Within 1 week of appointment: an initial planning meeting.
2. Within 5 weeks of appointment: submission of an evaluation framework, a reviewed and amended version of the Programme Logic Model and a Summative Assessment Plan.
3. End March 2021: submission of an interim report to include commentary on delivery mechanisms and client satisfaction as well as the management of the project and progress against project (internal) and contractual targets
4. June 13th 2022: submission of draft versions of the final evaluation report, the SAR & the SAR Summary
5. July 14th 2022: submission of the final evaluation report, the SAR and the SAR Summary.

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| ***Milestones*** | ***Payment terms*** |
| Initial planning meeting |  |
| Receipt of evaluation framework, amended Logic Model & Summative Assessment Plan | 20% |
| Receipt of interim report | 30% |
| Receipt of draft evaluation report, SAR & SAR Summary | 20% |
| Receipt and approval by the client of final evaluation report, SAR & SAR Summary | 30% |

**Cost**

The available budget for the longitudinal evaluation and summative assessment is up to £36,000 inclusive of expenses and VAT if chargeable.

**Application Process**

**Terms & conditions of tender**

1. The fee for the work will be up to £36,000 inclusive of expenses and VAT if chargeable.
2. Risk management – tenderers should include a summary of the key risks in the delivery of the longitudinal evaluation & summative assessment and what contingencies they will put in place to mitigate them.
3. Data Collection and Confidentiality – The successful tenderer shall comply with the requirements of the EU General Data Protection Regulation and shall not disclose or allow external access to any personal data acquired by them during the course of the Contract (other than to a person engaged by them on this basis). Prospective tenderers should submit a copy of their Data Protection Policy.
4. Copyright and IP – The successful tenderer will grant to Creative Kernow a non-exclusive licence without payment of royalty.
5. Tenders shall be valid for a minimum of three calendar months from the closing date for receipt of tenders.

Please submit tenders by email to jane@cultivatorcornwall.org.uk.

**Proposal format**

Proposals should no more than 30 sides of A4 and font size should be no smaller than Calibri 12.

**Submission**

Tenderers are required to provide:

* A statement outlining your interest in the work.
* A capability statement, outlining knowledge and/or skills and experience of delivering similar longitudinal evaluations & summative assessments. Include evaluations / assessments of ERDF funded programmes where possible.
* CVs of any staff who will work on the evaluation / assessment with details of relevant previous work.
* Costed methodology and approach
* The names and contact details for 2 referees/former clients for whom you have completed similar evaluations and summative assessments
* A copy of their Data Protection Policy
* A completed declaration of interest & non collusion statement (Appendix 3)

**Clarification questions**

If you have any questions relating to any aspect of this invitation to tender, please submit these by email to jane@cultivatorcornwall.org.uk. by no later than 12pm on the 27 January 2020.

In the interests of transparency and fairness the responses to questions raised will be posted (without identifying the sources of the enquiry) on <https://www.creativekernow.org.uk/cultivator/> on or before 31 January 2020

**Assessment**

Creative Kernow undertakes selection procedures which are open, fair, efficient and economical to implement and which seek to achieve best value for both the tenderers and the Client.

Submissions will be assessed against the following criteria:

* Previous experience of delivering longitudinal evaluations & summative assessments of a similar size complexity / context. 30%
* Capability & capacity to deliver the longitudinal evaluation & summative assessment, including previous experience, skills & knowledge of staff. 20%
* Strength & thoroughness of methodology of proposed approach & understanding of brief. 20%
* Value for money. 30%

**Timetable & deadlines**

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| ***Activity*** | ***Date*** |
| Invitation to tender published / circulated | 13 January 2020 |
| Deadline for receipt of clarification questions from prospective tenderers | 27 January 2020 |
| Responses to clarification questions published / circulated by | 31 January 2020 |
| Closing date for receipt of tenders | 13 February 2020 |
| Interview date | 21 February 2020 |
| Notification of award | 24 February 2020 |
| Contract starts | 05 March 2020 |