

Invitation to Tender

Project Code: SD1

Date of Issue: 20 January 2021

Title: Review of best impact practice

Carnegie United Kingdom Trust
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This ITT form must be completed in line with the procedures outlined in the procedure note – F6 - Procurement Handbook.

Contacts:

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Rachel Heydecker, Policy and Development Officer

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The Carnegie United Kingdom Trust reserves the right to alter tender terms/specification/objectives and will not be held liable for any costs incurred in drawing up a tender proposal.

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1. Introduction

Carnegie United Kingdom Trust

The Carnegie United Kingdom Trust works to improve the lives of people throughout the UK and Ireland, by changing minds through influencing policy, and by changing lives through innovative practice and partnership work.

With a remit in our Trust Deed and Royal Charter to address the wellbeing of people throughout the UK and the Republic of Ireland, we are one of over twenty foundations worldwide set up in the early twentieth century by Andrew Carnegie, the Scots-American philanthropist.

2. Background

The Carnegie UK Trust will commence a new strategic plan in 2021. This project seeks to build on our impact knowledge through a review of best impact practice by similar policy-oriented organisations, in order to make informed decisions about our own impact measurement for the Trust's next strategic plan.

Our current impact and evaluation approach rests on the Theory of Change set out in our 2016-2020 **Strategic Plan** (page 4). We recognise the relationship between advocacy change, policy change, practice change and social change is complex and contingent, so approach impact monitoring with curiosity and see it as an opportunity for continuous learning and reflection.

The Trust's Impact and Evaluation policy is also based on two explicit values: being evidence-based and credible. We believe that measuring outcomes, as well as outputs, is central to this approach. In our policy and practice work, we advocate for an outcomes-based approach to measuring and understanding social progress, and therefore take an outcomes approach to our impact reporting. We currently separate outcomes into advocacy outcomes, policy outcomes, practice outcomes and social outcomes.

The Trust currently uses three mechanisms to measure project progress: monitoring, external evaluation and self-evaluation.

3. Project Aims and Objectives

The aims of the project are:

1. To carry out a review of best impact measurement practice by policy-orientated organisations similar to the Trust (for example operating foundations, think tanks and NGOs); and
2. To engage staff in thinking about impact for 2021-25 through a collaborative, all staff workshop.

4. Anticipated Approach

Due to current and potential ongoing COVID-19 restrictions, we do not expect any face-to-face meetings or activities during the project. We propose that the successful consultant begin their contract with an online induction meeting with the CUKT project lead and other team members to talk through the background, aims and approach of the work. The consultant will work independently but will have regular check-ins with the project officers over email or video conference. The contract includes the design and delivery of an all-staff workshop, which will take place online.

The project is made up of three main activities:

1. A rapid, desk-based, review of impact measurement practice by policy-orientated organisations similar to the Trust. The organisations to be reviewed will be agreed between the Trust and the successful consultant.
2. Interviews with those leading impact measurement within the identified organisations. These interviews will take place over the telephone or using video conferencing, providing the opportunity to speak to organisations across a range of jurisdictions.
3. A presentation to CUKT staff on the findings of parts 1 and 2, engaging them in thinking about which suggestions should be taken forward. The consultant will have sight of a draft version of the Trust's new strategic plan, shared in confidence.

5. Deliverables

The proposed outputs are:

1. A rapid review of impact measurement practice by policy-orientated organisations similar to the Trust, based on desk-based research and interviews. This will be for internal use only; and
2. A workshop to support CUKT practice in the future with a write up from the contractor of the key issues raised and agreement reached on ways forward.

6. Timetable and Costs

The budget available for the project is £10,000 inclusive of VAT, travel and all other expenses.

We envisage the consultant starting the project during the week commencing 8 March 2021. We would like to see the results of the review (step one) by the end of April 2021, with the all-staff workshop undertaken by mid May 2021. We expect the whole project to be completed by the end of May 2021.

We recognise the need for this timetable to be responsive to the current COVID-19 context and this will be discussed with the successful consultant.

7. Performance & Quality Requirements

We propose that the tender include examples of previous experience, with references that illustrate the applicant's suitability for this work.

The tender should include details of how a high quality of output will be ensured.

8. Selection Criteria

The Trust will make its selection on the basis of the proposal which represents the best value for money, taking account of the following criteria:

- Understanding of the topic to be investigated;
- Selection of appropriate methods;
- Likelihood of achieving project aims using approach identified in tender;
- Ability to deliver in specified timescale (inc. staff capacity);
- Confidence in ability to provide in-depth analysis of findings;
- Previous relevant experience of research method;
- Previous relevant experience of topic area;
- Quality of previous work with CUKT (if applicable); and
- Cost.

9. Form of Proposal

Proposals should be no more than 4 sides of A4, detailing how the consultant would deliver the aims and outputs above within the time and cost framework. Please provide a breakdown of costing.

Proposals must be sent to both Hannah Ormston and Rachel Heydecker by email [Hannah.ormston@carnegieuk.org and Rachel.heydecker@carnegieuk.org] by 12 noon on Wednesday 17 February 2021.

Potential providers are welcome to contact Hannah or Rachel via email in the first instance to discuss the aims of the project in more detail.