



SPECIFICATION

INDEPENDENT EVALUATION

QUALITY AND IMPACT

Matt Hempstock

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**NATIONAL
LOTTERY FUNDED**



European Union
European
Social Fund

1. EXECUTIVE SUMMARY

- 1.1. The West of England Works Project wishes to appoint an external organisation to conduct an independent evaluation of the project. This will include:
 - 1.1.1. Working with the West of England Works Project Management Team to agree and develop appropriate measures and approaches through which to evaluate the project in terms of:
 - 1.1.2. The quality and effectiveness of delivery;
 - 1.1.3. The impact on individual participants;
 - 1.1.4. The impact on individual project partners and the local voluntary and community sector;
 - 1.1.5. The contribution made to relevant local strategies and initiatives;
 - 1.1.6. Wider socio-economic impact;
 - 1.1.7. The effective promotion of project cross-cutting themes:
 - 1.1.7.1. Equality, Diversity and Gender Equality [EDGE];
 - 1.1.7.2. Sustainable Development.
 - 1.1.8. Conducting an ongoing independent evaluation of the project in line with the measures agreed;
 - 1.1.9. Reporting on the findings of the ongoing independent evaluation of the project through the production of evaluation reports and presentations to appropriate audiences at intervals throughout the project and at the end of the project.
- 1.2. The project seeks to recruit c.1,700 participants resident within the West of England area (i.e. the unitary authorities of Bath and North East Somerset, Bristol, North Somerset and South Gloucestershire) and is currently delivered through a network of c.20 voluntary and community organisations. We anticipate that this number could potentially grow to c.100 voluntary and community organisations throughout the project.
- 1.3. Following contract award, the evaluation programme (including the publication of the final report) will run until 31st December 2019.
- 1.4. The maximum budget available to support this work is £35,000. Proposals that demonstrate an ability to complete the evaluation to the required level of quality within a lower budget will be considered favourably.

1.5. At the time of publication the Big Lottery Fund have indicated that some Building Better Opportunities Programme projects may be extended, potentially until 2023. If the West of England Works project secures an extension we may want the Independent Evaluation to continue to cover this additional period and may release additional funding to facilitate this.

1.6. If you have any questions regarding this procurement exercise please contact:

procurement@westofenglandworks.org.uk

1.7. We are required to maintain openness and transparency through ensuring that all potential tenderers have access to the same information and support. Given this we reserve the right to circulate any question submitted and the associated response to all tendering organisations.

1.8. All proposals should be submitted both electronically and in triplicate hard copy to

TENDER – EVALUATION
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Weston College
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procurement@westofenglandworks.org.uk

1.9. The deadline for responses is noon on Friday 23rd November 2018

2. CONTEXT - THE WEST OF ENGLAND WORKS PROJECT

2.1. The West of England Works Project is part of the national Building Better Opportunities programme delivering across the following unitary authority areas:

- Bath and North East Somerset
- Bristol
- North Somerset
- South Gloucestershire

2.2. The project supports unemployed and economically inactive individuals with complex needs who face multiple barriers to employment to develop their confidence and skills in order to secure employment. In contrast to other programmes aimed at supporting the unemployed, the West of England Works project is specifically designed and intended to support the individuals who are hardest to help and furthest from the labour market. Groups of such individuals include:

- | | |
|--|---|
| ▪ Disabled People | ▪ People with drug and alcohol dependency |
| ▪ People who are over 50 | ▪ People with educational attainment issues |
| ▪ People who are homeless or in housing need | ▪ People with family, parenting and relationship problems |
| ▪ People from Black and Minority Ethnic (BAME) communities | ▪ People with health problems, particularly mental health |
| ▪ People who are offenders or ex-offenders | ▪ People operating in the informal economy |
| ▪ People with caring responsibilities | ▪ Young people |
| ▪ People with digital exclusion issues | |

2.3. The project is jointly funded by the Big Lottery Fund and the European Social Fund and runs from 1st January 2017 to 31st December 2019.

2.4. The Big Lottery Fund is currently considering an extension of the Building Better Opportunities programme. This referred to as BBO2.

2.5. If BBO2 progresses and the West of England Works project secures an extension it is envisaged that (through further negotiation) the independent evaluation will also be extended (in terms of both delivery timescales and available budget).

2.6. We anticipate that decisions regarding BBO2 will be taken by the Big Lottery Fund in late 2018.

2.7. The project is led by Weston College and delivered through a network of local voluntary and community sector organisations located across the West of England area. Current Anchor Partners include:

- Addiction Recovery Agency
- Barton Hill Settlement
- Broadway Lodge
- Business in the Community
- Carers Support Centre
- Creative Youth Network
- CURO
- Developing Health and Independence
- Julian House
- Phoenix Social Enterprise
- Prince’s Trust
- Releasing New Potential
- Southern Brooks Community Partnerships
- Southmead Development Trust
- Team North Somerset
- The Park
- West of England Centre for Inclusive Living

2.8. Each partner is tasked with using a variety of approaches to identify potential participants and recruit them to the project. Some participants will be referred by statutory services such as JobcentrePlus, others will be referred by other organisations within the wider local voluntary and community sector and others will be directly engaged by the partner through outreach activities within the local community.

2.9. Once engaged, the partner will complete a detailed and holistic assessment of the participant in order to identify issues and barriers that prevent or disadvantage the individual from securing gainful employment. Once the barriers are identified the partner and the participant will jointly design and agree an individualised programme of support intended to address the barriers identified and progress the participant towards and into employment.

2.10. Individualised programmes of support may include a very broad range of interventions, some drawing upon the expertise of specialist organisations to deliver, but most will include personal and social development, general employability skills, jobsearch, CV writing, interview skills and (where appropriate) a work experience placement.

2.11. The partner and participant will regularly review progress throughout their time on the programme and modify the individualised programme of support in order to address emerging issues and barriers.

2.12. Ideally, following their time on the project the participant will secure employment and the partner will continue to work with them in order to ensure that they are settled in their new job and likely to be retained. The period of this ongoing support is not fixed but would normally be aligned with the participants probation period.

2.13. As the project works with the individuals who are hardest to help and furthest from the labour market, it is recognised that a job may not be a realistic outcome for some in the time allowing. For such individuals progression to structured jobsearch or a formal training course may be more appropriate progression routes.

2.14. The project is required to deliver the following by 31st December 2019:

TARGET		TARGET 2017	TARGET 2018	TARGET FULL PROJECT	% OF TOTAL STARTS
All targets below are expressed cumulatively					
OUTPUTS	TOTAL NUMBER OF PARTICIPANTS	630	1,291	1,537	100%
	OF WHICH MEN	310	636	757	49%
	OF WHICH WOMEN	320	655	780	51%
	OF WHICH UNEMPLOYED	150	308	366	24%
	OF WHICH ECONOMICALLY INACTIVE	480	984	1,171	76%
	OF WHICH AGED 50+	100	205	244	16%
	OF WHICH WITH DISABILITIES	123	252	300	20%
	OF WHICH BAME	63	129	153	10%
RESULTS	PROGRESSION TO EDUCATION OR TRAINING	88	250	384	25%
	PROGRESSION TO EMPLOYMENT	53	147	230	15%
	OF WHICH PREVIOUSLY UNEMPLOYED	10	29	46	13%
	OF WHICH PREVIOUSLY ECONOMICALLY INACTIVE	43	118	184	16%
	PROGRESSION TO JOBSEARCH [PREV ECON INACT ONLY]	106	295	461	39%
PROJECT SPECIFIC / BIG TARGETS	NUMBER OF PARTICIPANTS WHO REPORT FEELING MORE CONFIDENCE AND BETTER PREPARED TO SEEK EMPLOYMENT FOLLOWING PARTICIPANT	140	420	700	46%
	NUMBER OF PARTICIPANTS WITH MENTAL HEALTH ISSUES WHO REPORT AN IMPROVEMENT IN THEIR ABILITY TO UNDERSTAND AND MANAGE THEIR HEALTH AND WELL BEING AS A RESULT OF PARTICIPATING IN THE PROJECT [60% OF THOSE PRESENTING WITH MENTAL HEALTH ISSUES]	n/a	n/a	n/a	60% [of participants with mental health issues]
	NUMBER OF PEOPLE WHO REPORT THAT THEY HAVE AN IMPROVED AWARENESS OF TRAINING OPPORTUNITIES AND ARE BETTER EQUIPPED TO ACCESS THEM	230	690	1,150	75%
	NUMBER OF PARTICIPANTS UNDERTAKING WORK-TASTERS, WORK-EXPERIENCE, VOLUNTEERING OR DIRECTLY PROGRESSING INTO EMPLOYMENT	120	360	600	39%

2.15. Further information regarding the West of England Works Project can be found here:

www.westofenglandworks.org.uk

Further information regarding the wider Big Lottery Fund Building Better Opportunities Programme can be found here:

<https://www.biglotteryfund.org.uk/global-content/programmes/england/building-better-opportunities>

Specific guidance concerning project rules, processes, paperwork, claims etc can be found here:

<https://www.biglotteryfund.org.uk/global-content/programmes/england/~link.aspx?id=50FAB7D4B5A248F8A8C8F5D4D33F9E0F&z=z>

3. DETERMINING THE SCOPE OF THE EVALUATION

- 3.1. The first piece of work to be conducted as part of the independent evaluation process will be to formally agree the scope of the evaluation and specific measures that will be used to evaluate the project. Subject to negotiation, we anticipate that the scope of evaluative activities will include:
 - 3.1.1. The quality and effectiveness of delivery;
 - 3.1.2. The impact on individual participants;
 - 3.1.3. The impact on individual project partners and the wider West of England voluntary and community sector;
 - 3.1.4. The contribution made to relevant local local strategies and initiatives;
 - 3.1.5. Wider socio-economic impact;
 - 3.1.6. The effective promotion of project cross-cutting themes:
 - 3.1.6.1. Equality, Diversity and Gender Equality [EDGE];
 - 3.1.6.2. Sustainable Development.
- 3.2. These may be updated and / or amended through negotiation between the successful applicant and the West of England Works project team if sensible alternatives and / or different approaches are recommended, though we anticipate that the broad areas set out above will form the core of the evaluation.
- 3.3. The successful applicant will also be able to draw upon evidence secured through the ongoing Anchor Partner Self-Assessment Process and the programme of performance reviews and compliance checks undertaken by the West of England Works project team. The partner Self-Assessment process is scheduled to be implemented for the second time in late 2018.

4. THE QUALITY AND EFFECTIVENESS OF DELIVERY

- 4.1. As the West of England Works project is tasked with providing support for the individuals who are furthest from the labour market and face significant, complex and multiple barriers to employment it is essential that our delivery model is effective and implemented to a high standard of quality.
- 4.2. We look to the successful applicant to propose a methodology through which this will be evaluated. The proposed methodology should evaluate and incorporate the findings of the Self Assessment Process that has been developed and implemented to support the project, and should as a minimum answer the following key questions:

- 4.2.1. How effectively does the WoEW project identify, engage, induct and recruit appropriate participants (in terms of the level of disengagement and within all targeted demographic categories)?
 - 4.2.1.1. Is the project effectively recruiting the 'right' participants or those who are easiest to engage but could be effectively supported by alternative provision?
 - 4.2.1.2. How effectively do partners recruit participants from under-represented groups?
 - 4.2.1.3. How effectively do Anchor Partners work with Strategic Partners to secure appropriate referrals to the project
 - 4.2.2. How effectively does the WoEW project identify the full range of key issues / barriers that prevent the participant from progressing into (or closer to) employment?
 - 4.2.2.1. How effectively do Anchor Partners identify the underlying causes of barriers to employment rather than only the symptoms?
 - 4.2.3. How effectively does the WoEW project prioritise and translate the issues / barriers identified into an individualised programme of support?
 - 4.2.4. Do individualised programmes of support make effective use of Specialist Provision, Work Tasters and Work Experience Placements?
 - 4.2.5. How effectively do partners review participant progress and update individualised programmes of support accordingly?
 - 4.2.6. How effectively do partners support participants to progress to an appropriate progression destination and manage the progression process?
 - 4.2.7. How effectively do partners support participants following progression to ensure that they are settled at the destination and gain assurance that the progression is secure?
 - 4.2.8. How effectively do Anchor Partners assure the quality of their provision?
- 4.3. The successful applicant should set out the methodologies through which the above questions will be answered and propose any other relevant subjects / questions that they recommend should be included in the evaluation.

5. THE IMPACT ON INDIVIDUAL PROJECT PARTICIPANTS

- 5.1. In addition to simply measuring the success of the project in terms of the specific and quantifiable targets set out in the project specification we are keen to identify and understand the wider qualitative impact that participation on the West of England Works project has on the lives of participants.
- 5.2. This qualitative impact could take many forms including (though not limited to):
 - 5.2.1. Increased confidence;
 - 5.2.2. More stable / less chaotic lifestyles;
 - 5.2.3. Positive impact on health / mental health;
 - 5.2.4. Increased self-sufficiency, including the confidence and capacity to travel independently;
 - 5.2.5. Increased housing security;
 - 5.2.6. Continuing post-project positive progression.
- 5.3. The successful applicant should set out the methodology through which they plan to capture and analyse the broader impact of the project on participants;

6. THE IMPACT ON INDIVIDUAL PROJECT PARTNERS AND THE WIDER LOCAL VOLUNTARY AND COMMUNITY SECTOR

- 6.1. One of the key aims of the West of England Works project is build the capacity of the the local voluntary and community sector and support them to work more effectively together. Given this we need the external evaluation process to consider how partners have developed and grown as a result of the project.
- 6.2. The evaluation should be primarily concerned with the capacity building and increased effective working between project Anchor Partners but also wish to consider how effectively Anchor Partners, Specialist Patners and Strategic Partners work together.
- 6.3. The project is also expected to have a beneficial impact on the wider voluntary and community sector.
- 6.4. The successful applicant should set out how they propose to analyse and evaluate capacity building that has taken place within the West of England Works project and form judgements regarding the effectiveness of working relationships between all key partners and any beneficial impact on the wider West of England Voluntary and Community Sector.

7. THE CONTRIBUTION MADE TO RELEVANT LOCAL STRATEGIES AND INITIATIVES

- 7.1. The West of England Works project is not delivered within a vacuum and we must therefore plan our activities in a manner that makes a valuable contribution towards a range of local strategies and compliments wider initiatives.
- 7.2. Some such strategies and initiatives were in place before the project was developed whereas others have emerged more recently. Those developed by the Local / Combined Authorities and / or the Local Enterprise Partnership are of greatest relevance but others should also be considered.
- 7.3. The successful applicant should identify the relevant local strategies and set out how they propose to evaluate the contribution made by West of England Works

8. WIDER SOCIO-ECONOMIC IMPACT

- 8.1. Although this can be difficult to isolate and quantify, in order to be judged to be truly effective the West of England Works project is expected to have a beneficial socio-economic impact within the West of England area. The project has specific targets that relate either directly or indirectly to local productivity, health and wellbeing but we hope that wider benefits will be realised in relation to broader socio-economic factors.
- 8.2. Key themes that have arisen during the delivery phase of the project include:
 - 8.2.1. Social Isolation;
 - 8.2.2. Community Cohesion and Resilience;
 - 8.2.3. Hyper-local economic impact;
 - 8.2.4. Social Prescribing
- 8.3. The successful applicant will propose a range of socio-economic factors against which the project may reasonably be expected to make a positive impact and set out how they intend to analyse and report on such impact.

9. THE EFFECTIVE PROMOTION OF CROSS-CUTTING THEMES

- 9.1. All projects funded by the European Social Fund are expected to actively promote the cross-cutting themes:

- 9.1.1. Equality, Diversity and Gender Equality;
 - 9.1.2. Sustainable Development.
- 9.2. As a minimum requirement all partners are expected to develop an effective policy and associated action plan in support of each cross-cutting theme.
- 9.3. Detailed guidance concerning cross-cutting themes can be found here:
- [file:///svr-sc-file01/home\\$/matt.hempstock/Downloads/10%20Section%20ten%20Crosscutting%20themes%20v6%20\(1\).pdf](file:///svr-sc-file01/home$/matt.hempstock/Downloads/10%20Section%20ten%20Crosscutting%20themes%20v6%20(1).pdf)
- https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/707894/ESF_Cross_Cutting_Themes_guidance.pdf
- 9.4. The successful applicant will set out the methodology through which they propose to evaluate the promotion of cross-cutting themes within the WoEW project with a specific focus on quantifiable impact.

10. OTHER REQUIREMENTS

- 10.1. As an appropriate evaluation proposal is likely to include participant interviews we require the successful applicant to ensure that current Disclosure and Barring Service Checks are in place for all staff who will be interacting with participants in an unsupervised manner. Where this is not possible the applicant must be in a position to carry out the proposed activities with appropriate supervision at all times;
- 10.2. The evaluation must be conducted in a manner that is compliant with the recently introduced General Data Protection Regulations;
- 10.3. The successful applicant will be expected to operate in line with project / Anchor Partner policies and procedures for both Safeguarding and PREVENT.
- 10.4. The successful applicant must hold adequate insurance for both employers and public liability;
- 10.5. The successful applicant will be expected to meet with the WoEW project team on at least a monthly basis in order to offer updates on progress.
- 10.6. The successful applicant should be in a position to demonstrate sufficient knowledge / experience within the following fields:
- Information Advice and Guidance;
 - Initial Assessment / Diagnostics;
 - Employability Programmes;
 - Health and Wellbeing Programmes;

- The Voluntary and Community Sector (ideally within the West of England);
- Socio-Economic Impact Research;
- The Big Lottery Fund / European Social Fund 'Building Better Opportunities' Programme in general (ideally including other projects for comparative purposes);
- Sustainability;
- Equality and Diversity.

10.7. The successful applicant should be in a position to demonstrate sufficient independence from Weston College and all WoEW delivery and strategic partners.

10.8. The successful applicant must be willing to share all data and reports arising from the independent evaluation with key stakeholders including Weston College, the Big Lottery Fund, DWP, the West of England Local Enterprise Partnership, all West of England Local Authorities (including the Combined Authority) and any organisation appointed by the Big Lottery Fund with responsibility for conducting programme evaluation at national level.

11. BBO2

- 11.1. As, at the time of writing, no decision has been taken regarding the BBO2 programme and the potential role of the West of England Works project within this successor programme, this specification details requirements for the BBO1 phase only which expires on 31st December 2019.
- 11.2. We understand that if BBO2 proceeds it is likely to be realised through the extension of existing projects.
- 11.3. Given this scenario, it is possible that there may be a requirement for the independent evaluation process to continue beyond 31st December 2019.
- 11.4. Applicants should consider this when developing their proposals and build in sufficient flexibility to accommodate a potential extension within their plans. We envisage that an appropriate response may be to provide a substantial interim report in December 2019 rather than the final report and use this to identify priorities for further analysis and evaluation during BBO2.
- 11.5. We understand that decisions regarding BBO2 are currently scheduled to be made in late 2018.

12. BUDGET & PAYMENTS

- 12.1. The West of England Works project has set aside a budget of £35,000 to support the Independent Evaluation Process.
- 12.2. The £35,000 budget is intended to support all independent evaluation activities that take place up to 31st December 2019. If the West of England Works project is extended to deliver BBO2 additional monies may be allocated.
- 12.3. Proposals that demonstrate an ability to deliver the required evaluation to an acceptable standard within a lower budget will be considered favourably.
- 12.4. Payments will be released in line with key milestones achieved within the Independent Evaluation Plan. A limited up-front payment may be considered provided that this can be suitably justified as necessary in order to deliver the evaluation.

13. RESPONSE

13.1. Your response to this specification should, as a minimum, include the following:

SECTION	CONTENT
1. ORGANISATION DETAILS	<ul style="list-style-type: none"> ▪ Full contact details (organisation and lead contact); ▪ Legal status of organisation; ▪ Companies House Registration Number (or equivalent); ▪ Details of all individuals anticipated to play a role within the proposal; <ul style="list-style-type: none"> ○ Details of specific role and relevant experience / CVs ▪ Organisational / individual experience of: <ul style="list-style-type: none"> ○ Information Advice and Guidance; ○ Initial Assessment / Diagnostics; ○ Employability Programmes; ○ Health and Wellbeing Programmes; ○ The Voluntary and Community Sector (ideally within the West of England); ○ Socio-Economic Impact Research; ○ The Big Lottery Fund / European Social Fund 'Building Better Opportunities' Programme in general (ideally including other projects for comparative purposes); ○ Sustainability; ○ Equality and Diversity. ▪ Details of at least 2 referees <u>and</u> examples of similar work previously undertaken
2. EXECUTIVE SUMMARY	<ul style="list-style-type: none"> ▪ A short summary of your proposal including details of all proposed key actions, milestones and deadlines;
3. DETERMINING THE SCOPE OF THE EVALUATION	<ul style="list-style-type: none"> ▪ Initial proposals for specific areas to be added to or removed from the range of evaluative activities detailed within the specification
4. THE QUALITY AND EFFECTIVENESS OF DELIVERY	<ul style="list-style-type: none"> ▪ A detailed initial project plan proposal that clearly sets out: <ul style="list-style-type: none"> ○ The full range of proposed measures upon which the evaluation will be based; ○ The specific methodologies through which data and evidence will be secured; ○ Specific benchmarks / standards that will be applied in order to inform the evaluation; ○ The proposed schedule for the evaluation including key activities, milestones, deadlines etc (Note: It is not a requirement that all evaluative activities take place concurrently. Where activities are planned to take place sequentially please provide proposed timings); ○ Proposals for reporting methodologies and timescales (interim and final) ○ Estimated number of hours requires to complete evaluation (with appropriate breakdown for key tasks)
5. THE IMPACT ON INDIVIDUAL PROJECT PARTICIPANTS	
6. THE IMPACT ON INDIVIDUAL PROJECT PARTNERS AND THE WIDER LOCAL VOLUNTARY AND COMMUNITY SECTOR	
7. THE CONTRIBUTION MADE TO RELEVANT LOCAL STRATEGIES AND INITIATIVES	
8. WIDER SOCIO-ECONOMIC IMPACT	
9. THE EFFECTIVE PROMOTION OF CROSS-CUTTING THEMES	
10. OTHER REQUIREMENTS	<ul style="list-style-type: none"> ▪ Details of how your proposal addresses all items listed in the 'Other Requirements' section of the specification. Note: Items that require the presentation of specific evidence e.g. DBS checks and Insurance) may be presented at this stage or (subject to confirmation at this stage) may be submitted prior to contract award.
11. BBO2	<ul style="list-style-type: none"> ▪ Details of all significant changes to the proposal that are anticipated to be necessary should the West of England Works project be extended to deliver BBO2
12. BUDGET AND PAYMENT	<ul style="list-style-type: none"> ▪ Details of proposed budget and details of proposed payment structure (including specific milestones that trigger payments); ▪ Evidence of value for money (e.g. hourly rates of key staff and number of hours required to complete key tasks).

13.2. All proposals should be submitted both electronically and in triplicate hard copy to

TENDER – EVALUATION

Matt Hempstock
Project Manager – West of England Works
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13.3. The deadline for responses is noon on Friday 23rd November 2018