

The Robertson Trust Scholarship

Invitation to tender for evaluation



The
Robertson
Trust

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Trust
Scholarship

Introduction

The Robertson Trust is commissioning an evaluation of our Scholarship programme.

The Robertson Trust Scholarship has been designed to support prospective students who have the potential to go to university but face financial and other barriers. It currently has four support packages for different student groups and provides a mixture of financial and non-financial support.

There are two parts to the evaluation contract which are detailed in this tender:

- 1) Providing an external evaluation of the programme as it currently operates. This will include working alongside the Scholarship team to develop recommendations for continuous improvement.
- 2) Developing tools and skills for continued internal evaluation beyond the end of the contract.

The expected value of the contract is £90K (plus VAT) for three years from Jan 2027-Dec 2029.

Overview of The Robertson Trust Scholarship

The Robertson Trust Scholarship has been designed to support prospective students who have the potential to go to university but face financial and other barriers. It currently has four support packages for different student groups: Young Students; Mature Students; Student Parents; and Articulation Students. Each one includes a mixture of financial and non-financial support to help reduce barriers that the students might face.

In the financial year 2025-26, we had 659 scholars, 159 of whom were new in that academic year, and we approved payments of around £2m. Most of this was through bursaries but it also included discretionary payments to Robertson Scholars experiencing acute financial hardship.

The programme is managed by a team at The Robertson Trust which is Scotland's largest independent funder. We have a mission to prevent and reduce poverty and trauma and are driven by our values of ambition, integrity, connection and equity.

We have also recently recruited a Scholarship Advisory Group. This is made up of current scholars and alumnae who will inform the strategic direction of The Robertson Trust Scholarship.

Background

The Trust has been providing bursary support to students who face barriers to entering university since 1992. In that time, we have supported over 2,000 scholars to overcome financial and other barriers to access universities across Scotland. Our offer has grown organically in response to what scholars have told us they need and want, as well as ensuring alignment with the overall strategy and mission of The Robertson Trust.

The Robertson Trust Scholarship has traditionally supported young people aged 16-25 to complete their undergraduate degree at university. However, we have recently changed how we support undergraduate students and have also introduced new support packages for mature students, student parents, and articulating students. The support includes a bursary worth up to £4,250 per year with wrap-around non-financial support available too. These changes were made using insights we gathered from a participatory evaluation we commissioned in 2023 of our then bursary and non-financial support offer, alongside supplementary research.

The research highlighted the range of financial, structural and emotional challenges that different groups of people faced in accessing higher education and offered recommendations for change. These were instrumental in guiding our criteria and support mechanisms to better meet student needs.

Across our support packages, we prioritise certain population groups. These are:

- People who have experience of deep poverty or very low income.
- Have experienced life events which could make going to university less likely such as experiencing homelessness, substance misuse, or domestic violence either personally or growing up.
- Are formally or informally care-experienced.
- Have or have had unpaid caring responsibilities.
- Are estranged from their family.
- Are from Black, Asian or Minority Ethnic Groups.
- Have a disability or long-term health condition.

There is more information about each of the offers on our website: [The Robertson Trust Scholarship | The Robertson Trust](#).

Theory of change

The overarching mission for The Robertson Trust Scholarship is to fund, support and influence solutions to prevent and reduce poverty and trauma through the post-16 education system.

Through our Scholarship offers, we believe that we can help to remove or reduce the barriers that are preventing people who want to access higher education from doing so. Through this, we hope to reduce their chances of experiencing poverty in the future.

To achieve, this, we will:

- Provide financial and non-financial support to people to 'get in' and 'stay in' to the post-16 education system, gaining the qualifications and experiences that can prevent future poverty – breaking intergenerational poverty, improving life chances and wellbeing, and ensure future earnings protect against poverty ('getting on').
 - Some of the non-financial support is delivered in-house by our Scholarship team while other elements are delivered by partners. We view all of these elements working in tandem to contribute to the aims and outcomes set out below.
- Support and challenge the post-16 education system, and those working with it, to maximise the system's ability to prevent and reduce poverty and trauma.

The aims of the programme are:

'Getting in':

- Improving fair access across the post-16 system.

'Staying in':

- Supporting students from fair access backgrounds to feel a sense of belonging within the post-16 system.
- Providing the financial and broader support people need to ensure they can stay in post-16 education if they want to.
- Providing opportunities for students to improve the skills and knowledge that are necessary for them to 'stay in' and reach their full potential.

'Getting on':

- Supporting students to transition successfully to their next steps (whether that is work or further study).

'Getting in' and 'staying in' are the biggest priorities for our Scholarship programme and we would expect the evaluation to be weighted accordingly.

Project Specification

Purpose of the evaluation

This evaluation contract has two main strands of work within it.

One is to provide an external evaluation of the programme as it currently operates. This should include analysis of what differences are being made and for whom, which elements of the support are the most impactful, and to report in a timely way that informs continuous improvement.

The second is to work with the Scholarship team to develop tools and skills to enable internal evaluation beyond the end of the contract.

The different elements involved in each of these are outlined below.

Provide an external evaluation of the programme as it currently operates.

- 1) To work with the Scholarship and Learning Teams, and the Scholarship Advisory Group, to refine and articulate the theory of change for The Robertson Trust Scholarship as a whole, and the individual support offers within it.
- 2) To understand the impact of our scholarship offers in reducing barriers to higher education. These include:
 - a. Financial barriers such as not having enough money to covers essential living costs such as rent, food, bills, clothing, etc., or the ability to pay for required course materials or equipment necessary for study.
 - b. Non-financial barriers such as juggling study with caring responsibilities, lack of confidence, or traditional employability skills to help post-graduation, and challenges for those who have experienced traumatic life events.
- 3) Comparison of data with similar students not on The Robertson Trust Scholarship for 'getting in,' 'getting on,' and 'staying in.' We have suggested sources for comparative data in the methods section below.
- 4) Explore which elements of the programme have the greatest impact. This should include an overview of what the different elements are, and a cost/benefit analysis to determine whether the differences being made are proportionate to the resource and financial cost.

- 5) Recommendations for further development. This should include:
 - a. Inclusion / prioritisation of additional groups (i.e. who is missing from the current support packages?)
 - b. Adaptations to the support provided to ensure that The Robertson Trust Scholarship is as impactful as possible.
 - c. How and where we can best influence the Scottish Government, universities, and other widening access/participation stakeholders to mainstream approaches with proven impact.

We will use the findings to inform how we shape The Robertson Trust Scholarship support packages on an ongoing basis.

Develop tools and skills for the team to continue internal evaluation beyond the end of the contract.

- 6) Review what data is currently being gathered that relates to The Robertson Trust Scholarship's outcomes, identify gaps, consider what data skills and processes are needed and help establish them if they do not already exist. This might be done through training and/or provision of technical support.

Methods

We have outlined our suggestions for methods below. However, bidders can suggest alternatives or additions to these.

- Evidence review. This will supplement the research evidence that has already been completed by and for the Trust and will include population groups facing the most barriers to post-16 education, what those barriers are, and what support already exists to prevent and reduce the barriers.
- Quantitative data. This will include a mixture of internal and external data that will allow us to compare the differences The Robertson Trust Scholarship is making to relevant student populations more generally. Internal data will include administrative data held by the Trust and a survey of existing scholars and alumni. External data that could be used for comparison will include:

'Getting in' and 'staying in' / access and retention

- Scottish Funding Council data on widening access: [Report on Widening Access 2023-24 - Scottish Funding Council](#)
- The number and proportion of students who progress to a second year of study: [Commissioner for Fair Access: annual report 2025/26 - gov.scot](#)

'Getting on' / achievement and positive destination.

- [Longitudinal Education Outcomes \(LEO\)](#) data held by the Department of Education.
- Relevant data on graduate outcomes held by HESA - [Graduate Outcomes open data repository | HESA](#). Sub-sets will include
 - The number and proportion of students who completed their studies: [Commissioner for Fair Access: annual report 2025/26 - gov.scot](#)
 - Graduate activities by provider and age group (HESA): [Table 2 - Graduate activities by provider and age group | HESA](#)
 - Graduate reflections (HESA): [Figure 17 - Graduate reflections | HESA](#)
 - Graduate activities by level of qualification obtained and ethnicity: [Table 12 - UK permanent address graduate activities by level of qualification obtained and ethnicity | HESA](#)
- Qualitative: data gathered from:
 - Scholars and alumni.
 - Other stakeholders as appropriate.

This could be gathered in a range of ways (including surveys, focus groups, interviews or other creative tools) and might include elements of peer research or evaluation.

- Working closely with the Scholarship and Learning teams to develop tools, processes and skills

Information you will have access to

- Through our internal Salesforce system, we are able to generate quantitative data about the programme. This includes information on the number of scholars, university and course being attended, amount of money awarded, and participation in different parts of the programme etc.
- The successful bidder will also have access to an internal evaluation of our previous lone-parent bursary scheme and the external evaluation of the Journey to Success programme.
- Evaluation evidence from relevant delivery partners who provide elements of non-financial support to scholars.
- Some grant and outcomes information from relevant grants, where we have permission to share it.

All personal data that is relevant to this evaluation will be anonymised and shared with the evaluator(s) to comply with our GDPR guidelines.

Evaluator(s) are expected to add value to data that is already collected and should avoid duplicating what is already being asked of the scholars.

Outputs

We would expect you to create outputs which will make the findings of the external evaluation accessible to a number of audiences including:

- Staff and Trustees at The Robertson Trust.
- External stakeholders who support the work of the Trust.
- Current scholars and our alumni network.
- Nominating partners.
- Policy makers, legislators, and other organisations who advocate in Higher Education (such as NUS, student unions).

The outputs for this evaluation may include, but are not limited to:

- A clearly articulated theory of change for the programme.
- Workshops, presentations or other methods for identifying and implementing continuous improvement, as well as developing internal evaluation skills and tools.
- Interim and final reports.
- Summary products that outline recommendations for improving policy and practice (e.g. top tips around participation, mentoring, etc).
- 'How to' guides for ongoing internal evaluation.

We want to use the learning from the external evaluation to inform continuous improvement and influencing activities throughout the three-year period. We therefore expect to have relevant outputs and/or updates at agreed times over the duration of the contract.

The Tender Process

Alongside a detailed explanation of how you will conduct the external evaluation and meet our internal evaluation needs, bids should also include:

- A risk register, with clear mitigation measures
- Summaries of relevant work experience for everyone who will be involved in the evaluation - please make clear the expected availability of each person over the course of the evaluation timeframe.
- A breakdown of the total cost of the work, inclusive of VAT where it applies
- Details of a clear approach to ethical and safeguarding matters, including careful consideration of informed consent, support for participation, and how to manage the risk of over-consultation.
- Details of a robust approach to Health and Safety and GDPR (including clear policies) and of having appropriate and adequate insurance cover in place (we will ask for evidence of these upon appointment).

Bids should be no more than 10 pages in length.

Timeframe

We anticipate that the contract will begin in January 2027 and will finish in December 2029. The two strands of work – the external evaluation and internal capacity building – will run concurrently over the contract.

Contract payments will be made at agreed points, subject to the successful completion. A timeline for the tender process has been included at the end of this document.

Value of the Tender

The value of this tender is **£90K (plus VAT)**.

Should there be additional cost requirements associated with gathering comparative data, please include an estimate and rationale in your bid for us to consider.

Tender process

Scoring

The evaluation panel will individually score your bid against the pre-determined scoring criteria. The evaluation panel will rank bidders' proposals by total score in order to determine who to invite to interview.

Scoring criteria	Weighting
Ability to meet the requirements of the project specification set out by The Robertson Trust	30%
Experience of supporting teams to establish effective and proportionate internal evaluation systems and processes.	15%
Ability to meet the timescales set by the Trust (including a clear and realistic delivery plan with timelines that responds to the objectives and key deliverables of the contract).	15%
Experience of conducting quantitative and qualitative evaluations	10%
Knowledge and understanding of the Widening Access/Participation agendas in Scotland.	10%
Ability to deliver a relationship management approach to engage with stakeholders involved in the evaluation (including references from previous work).	10%
Ability to demonstrate value for money (including a clear schedule of charges provided with corresponding staffing costs).	10%
Total	100%

Your overall score for each question will be calculated by multiplying the rating you receive with the weighting for that question.

A description of ratings is provided below.

Award	Description	Rating
Excellent	Response is very comprehensive and supported by a very high standard of evidence. Gives the Trust a high level of confidence in the ability of the Bidder to deliver the contract. Exceeds requirements in most respects.	5
Very Good	Response is comprehensive and supported by a high standard of evidence. Gives the Trust a high level of confidence in the ability of the Bidder to deliver the contract. Exceeds requirements in some respects.	4
Good	Response is comprehensive and supported by a good standard of evidence. Gives the Trust confidence in the ability of the Bidder to deliver the contract. Meets the Trust's requirements.	3
Satisfactory	Response is supported by a satisfactory standard of evidence in most areas. A few areas are lacking detail/evidence and giving rise to some concerns about the ability of the Bidder to deliver the contract.	2
Poor	Response is supported by a poor standard of evidence in several areas. Several areas give rise to concern about the ability of the Bidder to deliver the contract.	1
Unacceptable	No response or partial response and poor evidence provided in support of it. Does not give the Trust confidence in the ability of the Bidder to deliver the contract.	0

Timeline

Activity	Date
Tender issued	26 th October 2026
Notes of interest and questions received by prospective bidders	11 th November 2026
Answers sent out to all registered bidders	16 th November 2026
Submission of tenders to The Robertson Trust	2 nd December 2026
Assessments completed and interview invites sent	16 th December
Interviews with shortlisted bidders	w/c 11 th January
Bidders notified of outcome and successful bidder appointed	w/c 18 th January
Inception meeting	End January 2027
Work to commence	1 st February 2027
Update meetings	To be agreed
Interim outputs	To be agreed.
Final report	To be agreed

Further Information

For queries, or to express and interest in developing a proposal for this tender please contact Cassy Rutherford (Learning and Communications Manager) at TRTcomms@therobertsontrust.org.uk.