



# Invitation to Tender: Learning and Evaluation Partner

Partners in Change Fund



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## Introduction and background

The Robertson Trust (The Trust) is the largest independent grant-making trust in Scotland. Our vision is for a fair and compassionate Scotland where everyone is valued and able to flourish.

We fund and support organisations working to alleviate poverty and trauma in Scotland. We also inform, champion and inspire the third sector, sharing our knowledge and networks.

The Trust is inviting proposals from suitably experienced researchers and evaluators to undertake a learning and evaluation support function for our *Partners in Change* Fund (PiC). PiC will enable organisations working in Scotland with an annual income of more than £2m to develop and deliver work which changes how services and supports for people experiencing poverty and/or trauma are designed and delivered. The Trust wishes to work alongside the funded organisations as they develop and deliver their work to better understand the enablers of, and barriers to change.

Awards totalling £2.4m were approved to 6 organisations in August 2021 through a two-stage open application process. While there may be future rounds of funding, this invitation to tender relates specifically to this first cohort of awardees.

We expect an evaluator and learning partner(s) will be commissioned for around four years (commencing November 2021 and ending around October 2025) to cover the period of PiC initiation, delivery, completion, and consolidation of learning once the projects have ended.

## The Fund

### Background information on PiC

PiC is available to organisations working in Scotland with an annual income of more than £2M.

It will support work which aims to change how services and supports for people experiencing poverty and/or trauma are designed and delivered. The ultimate aim of this work is to reduce the impact that poverty and trauma has on people's lives. For more information on what we mean by poverty and trauma click [here](#).

Through PiC, we are interested in providing funding to, and working alongside, the organisations we support to better understand the factors that can help to enable or hinder change around services and supports for people experiencing poverty and/or trauma.

Funding up to a maximum of £150,000 per year for three years is being made available to the funded organisations.

## What type of work are we funding?

PiC has been established to support work which aims to change how services and supports addressing poverty and/or trauma are designed and delivered. This could include supporting organisations, either alone or in partnership, to:

- **test** new ways of working;
- **replicate** an intervention or support that has been trialled successfully elsewhere (either by your own organisation or another);
- move a service/support trialled successfully to a larger **scale**.

In some cases, this work will be focused on providing early support to people, aimed at preventing or reducing negative experiences and outcomes due to poverty and/or trauma. In other cases, it is meeting the immediate needs of people experiencing poverty and/or trauma.

We will be funding change proposals which are already developed, or in the latter stages of development. We expect organisations to begin delivery of their project no later than 12 months from notification of our funding decision (i.e. starting before August 2022 at the latest). At present, the latest project start date is listed as April 2022.

We are interested in organisations which plan to work collaboratively in the delivery of their change programme; be that with other agencies and organisations, or service users.

It is important to us that the organisations we fund through PiC are committed to evaluation and to learning, both from their own work, and from others funded through this initiative. We are interested in work that has local or national reach.

In line with our current strategy, organisations should be seeking to address one or more of the following issues:

- Financial wellbeing: tackling the financial and material effects of poverty on people and communities
- Emotional wellbeing and relationships: ensuring people have emotional wellbeing, and confidence and strength in their relationships with others
- Educational and work pathways: equipping people for the future by supporting learning and skills

We would also expect organisations to be working in a focussed way with at least one of our prioritised demographic groups which are: Certain family groups (larger families, single parents, those with children who have experience of care), women, disabled people, people from Black, Asian and minority ethnic backgrounds, asylum seekers and refugees, people experiencing severe and multiple disadvantage, people living in certain geographic locations (particularly remote and rural ones), older people, young people under 25.

## **What we hope to achieve through PiC**

PiC will enable us to:

- Provide funding to organisations with an annual income of £2m or more, to support work which aims to change how services and supports for people experiencing poverty and/or trauma are designed and delivered.
- Support the capability of our partners in change to deliver and evaluate successful change initiatives (as required by individual organisations)
- Learn about our own practice (particularly with regards to supporting change projects) and the world in which we are operating
- Share examples of good and emerging practice around addressing poverty and/or trauma

# Learning and evaluation

## How we will use the learning

We will use the learning and evaluation from PiC to:

- Deepen The Trust's understanding of the mechanisms of change, how they vary across different systems and what the enablers and barriers to change are.
- Learn about our role as a funder, and the role of other partners, in supporting change projects (i.e. what behaviours, attitudes, systems, resources do we and others need so that we can best support change work which is improving outcomes for individuals and communities) in order to inform our future work.
- Track the progress of the six initiatives supported through The Fund. We expect that the approaches will be adapted over time, in response to changing, real-world circumstances. We are interested in learning from these.
- Identify and highlight work being carried out by funded organisations which are using a change model to improve the lives of people experiencing poverty and/or trauma.
- Identify and share emerging practice and themes around how to use a change model to improve outcomes for people experiencing poverty and/or trauma.

## Learning and evaluation audiences

The main audiences for the learning and evaluation findings will be:

- **Our Partners in Change.** We want them to build in learning from their own projects and the wider cohort as they go, in order to adapt and improve what they are delivering.
- **The Robertson Trust.** We will use the learning to develop our practice as enablers and advocates for change methodologies.
- **Other funders and organisations looking to deliver change interventions.** Although PiC is focused on change projects that are seeking to address impacts associated with poverty and/or trauma, it is likely that learning will apply more broadly as it will be around "change" itself rather than specific interventions.

- **Other funders and organisations who want to understand more about emerging practice around poverty and trauma.** This will come from the project level evaluations, which we will be able to share and highlight.

## Learning and evaluation approach

The learning and evaluation element of this project contains both formative (process) elements and summative (outcome) elements. In addition to this, we want to work alongside the appointed Learning and Evaluation Partner to reflect not only on *what* change has happened through the projects, but *how* that change has happened. This will enable us to identify any common themes, or divergences, around the enablers and barriers of change.

In the first year of the contract, it is anticipated that there will be a focus on working alongside The Trust and our Partners in Change to establish clear boundaries for the learning and evaluation work, and to create a shared baseline of understanding around principles and methodologies of change.

We anticipate that the appointed Learning and Evaluation Partner will:

- Work alongside The Trust as a critical friend to explore existing and emerging practice and evidence around the role of funders in enabling change to happen within systems. This will help the Fund team to identify and inform ongoing developments to our work around change, its implementation, tools and processes
- Work with our Partners in Change (and their own delivery and evaluation partners); both individually to help them refine their project level evaluation work and collectively to draw out areas of shared need, knowledge and learning around delivery change initiatives.

We anticipate the learning and evaluation practitioner will draw information from:

- Documents produced about PiC by The Trust.
- Documents produced by our Partners in Change in relation to their funded piece of work (for example, project plans, evaluation plans, budgets).
- Data produced by the Partners in Change (and their own delivery and evaluation partners) and The Trust in monitoring and evaluating the funds.

- Interviews and group sessions with The Trust and key stakeholders from each of the funded projects.
- Existing relevant literature or findings about the successful implementation of change interventions.

## Limitations

We acknowledge the following aspects may place limitations on learning and evaluation:

- As PiC's development and two-stage application process has already been completed, the evaluator will be reliant on documents/records kept during this time.
- Across the six projects, there are various start dates which range from September 2021 to April 2022. This means that our Partners in Change will be generating information for evaluation and learning at different times and different paces.
- Some of the learning and evaluation we hope to gather at Fund level, will be informed by the type of evaluation and learning that our partners in change are gathering at project level. Our Partners in Change have different needs and expectations around the level of support that they want with their project evaluations and in some cases the Learning and Evaluation Partner may need to provide bespoke support around project evaluation plans.
- Some of the projects have listed a start date of September/October/November for their projects. This means that they, and their project evaluations, may have started already by the time the Learning and Evaluation Partner is in place. This will impact on the level of influence the Learning and Evaluation Partner can have on the individual project evaluations.

## Areas of Work

We anticipate that the Learning and Evaluation Partner will lead on delivery of the key aspects of the learning plan as follows:

### Developmental support

- *Supporting the Partners in Change and The Trust to develop a shared understanding of change methodologies, and how they apply to our work*

We are aware of the extensive evidence and research that has been done around change methodologies and we are keen to build and draw on this to frame and reflect on our own work.

Examples of the types of activities/outputs we expect to see from this stage include: desk research; facilitated workshops and training with the partners in change and The Trust; production of briefing papers summarising findings, and implications for the Fund.

- *Development of a monitoring, learning and evaluation framework*

The initial stage of our learning activities will concentrate on developing a shared and clear understanding of what PiC is, what it is we plan to achieve and learn, and what the conditions for being able to evaluate this will be. The Learning and Evaluation Partner will work alongside The Trust and the Partners in Change to discuss and agree a monitoring and evaluation framework. The framework will identify: the grant monitoring and fund learning and evaluation questions; the information that needs to be gathered; who will do this; and how and when it will be used (recognising that some data will be used to inform both grant monitoring and the fund learning and evaluation).

We are keen to build a culture whereby the partners in change see themselves as part of the learning journey on this Fund, rather than seeing monitoring and evaluation as something they need to do to receive the money. Therefore, it is important that they are involved in the conversations around monitoring, learning and evaluation as early as possible. This will also enable them to shape their own monitoring and evaluation plan for their funded piece of work, within the context of the monitoring and evaluation framework for The Fund as a whole.

Examples of the types of activities/outputs we expect to see from this stage include: a theory of change for the Fund; and a refined framework for monitoring, learning and evaluation.

## Monitoring and Evaluation Support

- *Providing monitoring and evaluation support to individual partners in change*

Once the monitoring and evaluation framework has been agreed, the Learning and Evaluation Partner will engage with each of the funded Partnerships on a 1:1 basis to ensure that they are able to capture agreed information about their work in line with the Fund's monitoring and evaluation framework. It will also be important to ensure that the

partners in change are capturing information to improve their own purposes as well as feeding it into the Fund monitoring and evaluation plan.

Examples of the types of activities/outputs we expect to see from this stage include: review of individual Partners in Change evaluation plans; 1:1 support and engagement to refine these plans.

- *Monitoring*

Grants given to each of our Partners in Change will be monitored to ensure accountability of the Fund and the projects. We recognise that the projects and approaches may need to be adapted over the course of the three years and so are looking to develop a framework that underpins an open relationship between us and our Partners in Change.

Grant monitoring for this purpose will be managed and carried out by The Trust using monitoring data collected by the Partners in Change in line with the monitoring and evaluation framework. The Learning and Evaluation Partner will undertake a support role to ensure organisations are clear on their grant monitoring and reporting requirements and that they have systems in place to gather the relevant data. However, they will not have responsibility for either gathering or collating the data for monitoring purposes.

Examples of the types of activities/outputs we expect to see from this stage include: 1:1 review and support to Partners in Change on their evaluation plans; and group sessions with the cohort to plan and review monitoring and evaluation.

- *Supporting the development of individual project evaluations*

Each of the Partners in Change will have their own evaluation plan in place for their funded project or intervention. It is not the role of the Learning and Evaluation Partner to carry out project level evaluations. Indeed, five either have, or are about to commission, an external evaluator; one will be doing a self-evaluation. Part of the assessment process focused on understanding the organisation's monitoring, learning and evaluation plans and we are confident that they will involve sufficient rigour.

Instead, the Learning and Evaluation Partner's role will be in relation to Fund level learning and evaluation. This is likely to include working with our partners in change to sense check their evaluation plans for deliverability (if possible) and for alignment with The Fund level evaluation questions. This links to the section about providing monitoring and evaluation support above. As some of the evaluation plans are at an earlier stage than others, the amount of support required is likely to vary between the organisations.

We would also anticipate that the Learning and Evaluation Partner would synthesise relevant findings and information from the individual evaluation plans to inform and support the Fund level evaluation questions.

Examples of the types of activities/outputs we expect to see from this stage include: 1:1 engagement with individual Partners in Change to review their evaluation plans and reports, report synthesising any relevant findings from the individual reports.

- *Fund level learning and evaluation*

The appointed Learning and Evaluation Partner will undertake an evaluation of the Fund. Using the agreed learning and evaluation framework to identify what difference the Fund has made to the Partners in Change, the work they are delivering, and the people engaging with it.

The focus on the evaluation will be on the change that has occurred itself, rather than trying to understand how the interventions being delivered have impacted on one particular issue or problem.

Over the course of the Fund, there will be a focus on identifying and considering in more detail common areas of challenge, good practice and learning about "what works" when delivering initiatives which aim to change how services are designed and delivered. The Learning and Evaluation Partner will work alongside the partners in change and The Trust to identify and explore topics. These are likely to include: common areas of challenge; good practice; guidance; other learning that emerges around how change initiatives are developed and delivered; and the role of all partners in successfully supporting this. This includes the role of The Trust as funder.

Examples of the types of activities/outputs we expect to see from this stage include: group learning and discovery sessions and interviews with the Partners in Change and The Trust to explore specific aspects of change implementation; opportunities to “test” specific theories or practices within the Fund’s implementation; briefings and findings reports; and overall learning and evaluation report.

## Evaluation questions

The following is an indication of the types of evaluation questions we anticipate will be included within the finalised monitoring and evaluation framework. However, it is important to note these are presented in draft and we anticipate that they will be refined, alongside the Partners in Change and The Trust, as part of the initial stages of the Learning and Evaluation Partner’s contract.

### To enable us to understand the scope, boundaries and substance of the Fund and evaluation:

- What existing evidence about change models are we building on?
- What is our understanding of what change looks like and how it happens?
- What is our theory of change – what does success look like for The Trust/Partners in Change and what do we expect to happen as a result of this Fund?

### To enable us to track progress throughout the fund (for the Partners in Change) and to help us understand what change has happened as a result of their work:

- What did the partners in change expect to happen as a result of their funded project?
- Are the partners in change on track with their work? To what extent is the change they anticipated happening?
- How have the partners in change’s services or supports changed as a result of their funded project?
- How are the people that the services and supports have been designed with and for telling the partners in change that they are experiencing their services differently as a result of the funded work

- Are these experiences leading to improved outcomes for the people using the services or supports?
- What surprising and unintended outcomes are identified through the project evaluations?
- Is it clear what is/isn't driving these changes?

### To enable us to build learning about supporting change interventions (our role, and that of delivery organisations)

- What can we learn about the behaviours, attitudes, experiences, roles, resources, systems and processes required to successfully implement a change model (ours and others)?
- What were the barriers and enablers to implementing a change approach?
- What are the implications for us in terms of how we develop and support this type of work in future?
- What elements of our learning from this fund are applicable and transferable to other settings (internal and external)?
- What approaches did we take at each stage of the process to support change?

## Learning and evaluation scope

The following table suggests where the PiC learning & evaluation will (and will not) focus its activities.

In scope	Out of scope
<ul style="list-style-type: none"> <li>• Collation and dissemination of existing and emerging evidence around change methodologies</li> <li>• Synthesis of relevant information from individual project evaluations and other sources of information</li> <li>• Support with the development of individual project evaluation plans</li> <li>• Act as critical friend to The Trust</li> </ul>	<ul style="list-style-type: none"> <li>• Evaluation of individual projects – these will be managed by each of the Partners in Change</li> <li>• Ongoing support for the projects’ evaluation practices or data gathering</li> <li>• Conducting fieldwork or gathering data directly from beneficiaries of the individual Partner in Change projects: we anticipate that the evaluator will use information gathered by the partners and their external evaluator (if applicable)</li> </ul>

## Relationships, roles and responsibilities

The learning and evaluation work is commissioned by The Trust. The Robertson Trust’s Interim Learning and Communications Manager will oversee the evaluation contract and be a primary contact and support for the learning and evaluation partner.

Initially it is anticipated that update meetings will take place monthly, although this is likely to reduce to quarterly after the initial set up period is over.

The Learning and Evaluation Partners partner(s) will be expected to work with an identified lead in each of the Partners in Change demonstration projects while carrying out the evaluation. The identified lead will also help facilitate evaluators’ access to data collected by the project, and to key stakeholders (e.g. for interviews with other partners involved in the project).

# The tender process and contract

## Timeframes and deliverables

The learning and evaluation contract is anticipated to last for four years from November 2021 to October 2025.

We anticipate the Learning and Evaluation Partner will need to use the initial phase of the evaluation to review the available information and confirm understanding of the Partners in Change Fund in order to then develop a final implementation plan for the work.

During the course of the contract, there will be a number of interim reports/insights papers produced which will be shared with all of the partners, as well as being circulated externally as appropriate. These will be produced at times that are agreed by The Trust, the Partners in Change and the Learning and Evaluation Partner.

## Budget

The budget for this work is in the region of £80k over the four years excluding VAT (c. £20k per annum). We expect the proposal to outline a clear breakdown of costs. We accept there will need to be some flexibility built into the contract as some elements of the work remain unknown at the time of issuing the tender. Please note that we will contract on the basis of the quality of your proposal (as detailed below) as well as the budget you prepare. This may be discussed in more detail if we invite you to an interview.

## Previous experience and related documents

We anticipate that the appointed Learning and Evaluation Partner will have previous experience which reflects the approaches we hope to take towards learning and evaluation through PiC, as outlined above. In particular, we are keen to hear from research and evaluators who have knowledge of change management and who are adept at extrapolating meaning from multiple projects and sources of information.

Associated documents for this tender are available on The Robertson Trust website [here](#) and [here](#).

## Applications

The deadline for applications is **Friday 30<sup>th</sup> September 2021**.

We anticipate that your proposal will be approximately 10 pages, and will include:

- Proposed evaluation approach and methods, including rationale, limitations, and any assumptions
- Ethical and data protection considerations
- Your approach to risk mitigation
- Project management approach and work plan/timetable
- Team member(s) roles and responsibilities within the evaluation including experience and qualifications
- Budget
- Links to two examples of work previous completed with projects of a similar nature

The successful provider will have relevant policies (Data Protection Policy, Indemnity and Public Liability Insurance) in place to ensure smooth delivery of the evaluation.

The following table shows the anticipated timeline for the tender process and contract initiation.

Activities	Date
Deadline for questions about the Learning and Evaluation Partner brief	17 <sup>th</sup> September 2021
All questions and answers sent to anyone who has expressed an interest in the tender	20 <sup>th</sup> September
Proposal Deadline	30 <sup>th</sup> September 2021
Discussion with shortlisted candidates and provider appointed	Week beginning 18 <sup>th</sup> October 2021
Initiation meeting with the appointed Learning and Evaluation Partner	Week beginning 25 <sup>th</sup> October 2021

Contract begins	1 <sup>st</sup> November 2021(although there is some flexibility if required after the initiation meeting)
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## Selection criteria

Criterion	Weighting
Understanding of and experience delivering required evaluation approach and methods	30%
Experience and understanding of relevant existing change methodologies : evidence and application	30%
Project management approach (clear roles and responsibilities, work plan, risk mitigation)	10%
Relationship management approach, references from prior work	10%
Value for money	10%
Ethical and data protection considerations	10%
<b>Total</b>	<b>100%</b>

## Further information

For queries, or to express an interest in developing a proposal for this tender, please email Cassy Rutherford (Interim Learning and Communications Manager) at [cassy.rutherford@therobertsontrust.org.uk](mailto:cassy.rutherford@therobertsontrust.org.uk) or by phone on 0141 353 7300.



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