



Evaluation of The Robertson Scholarship

Invitation to Tender

The Robertson Scholarship: Evaluation Tender

Introduction

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

The Robertson Scholarship aims to support young people aged 16 to 25 to overcome financial and social barriers to gain the university education and career they aspire to. As well as receiving a financial bursary, scholars also take part in a self-development programme called Journey to Success. This offers a range of training sessions, networking events and internships throughout the academic year. Combined, these aim to help young people break down some of the barriers they might be experiencing to access further education and their career of choice.

The programme is managed by a team at The Robertson Trust: Scotland's largest independent funder.

This year marks the 30th anniversary since the Trust began providing bursary support to students who face barriers to entering university and our work in this area has grown organically over that time. The existing Journey to Success programme was introduced seven years ago and has seen a number of changes since its inception. Over this time, The Robertson Trust has also been changing. In October 2020, we launched our 10-year strategy which focuses on reducing the impacts of poverty and trauma for people across Scotland.

As the Trust now has a clearer focus for what we want to achieve overall, we want to commission an independent evaluation of the Robertson Scholarship. This will help us to understand what differences it is contributing to, which activities are having the greatest impact, and for whom. It will also help us to understand how our work in this area could have the greatest impact on poverty and trauma, the potential for changes to the programme to do so and to understand options for initial steps. We will use these findings to inform how the programme is delivered in future years.

We want scholars to be actively involved at each stage of this evaluation, including gathering data, making sense of the findings, and helping to shape the future of what is delivered and how.

Details of the Robertson Scholarship

The Robertson Scholarship, including Journey to Success, was devised to offer self-development opportunities and financial support to 16 to 25-year-olds in Scotland who face barriers to accessing university. By providing a mixture of financial and practical

support, the programme aims to support young people to complete their studies in university and to progress on their chosen career path.

Since 1992, over 2,000 scholars have been supported to overcome financial and social barriers to access university. Now, each year on average, over 700 young people, known as Robertson Scholars, are supported to access a range of courses across Scotland's universities.

The programme has a focus on delivering improved outcomes around four key areas:

1. **Access** – getting into university
2. **Retention** – staying in university
3. **Attainment** – making the most out of university
4. **Graduate outcomes** – moving on from university

In recent years, we have been particularly interested in supporting those from backgrounds that are currently underrepresented in higher education. For 2022/23 our priority student population groups were:

- Young people from schools with low progression rates to higher education
- Young people from households with low incomes
- Young people from black and minority ethnic groups
- Disabled young people
- Young people with Care experience
- Carers
- Young people who are estranged from their family
- Young people from Gypsy, Roma and Traveller communities
- Young people from military families

Alongside an annual bursary of up to £4,250 per year, scholars are also given access to a range of other opportunities. These include personal development training sessions, leadership development events, internships, and networking opportunities. A full list of the current activities available under Journey to Success can be found in Appendix 1 of this tender document.

Direct support is given to scholars during each year of their academic course. We have also fostered a network of Scholarship Alumni. Through this, scholars are able to access peer support and mentoring from previous graduates.

As well as the above structure there are many other elements of the Journey to Success programme that we have developed to support scholars. These include: interventions designed to support a specific targeted group within the programme; specific career pathways; discretionary payments for financial emergencies; and outsourced mental health support. We have also previously piloted specific support to college students and lone parents but no longer actively undertake these areas of work.

Project Specification

Purpose of the evaluation

We want to understand the impact that the Robertson Scholarship has for the scholars that go through it and what changes it contributes to for them as individuals. Within this, we also want to know which elements of the programme contribute to the biggest changes, for whom, and what the resource implications are for us and the scholars (e.g. in terms of time, money, skills, knowledge etc.). It might be that the activities with the greatest impact change across different types of scholars and we would like to explore this where possible.

We are interested in how the programme is perceived externally, including among universities and other external stakeholders such as school contacts.

We also want to understand the potential for changes to the programme that would respond to the different external context we operate in and have the greatest impact on poverty and trauma.

We will use the findings to inform how we shape the Robertson Scholarship and Journey to Success programme in future years.

Evaluation questions

- **What is the changing context that Journey to Success is operating in compared to recent years, in relation to access, retention, attainment and graduate outcomes?**
 - What might this changing context now and in the next few years mean for how we shape the programme looking ahead?
 - Where should the programme work to have the maximum impact on poverty and trauma in this context?
 - What other bursary and self-development awards exist to support students to enter tertiary education in Scotland (and across the UK)?
- **What are the changes that the Robertson Scholarship is enabling or contributing to?**
 - For whom/ where?
 - Who/ where is missing?
 - How do we know?
- **How is change being enabled?**
 - What are the barriers?
- **How sustainable or systemic is the change that is being achieved?**
- **What types of changes to our Scholarship or Journey to Success offer should we be considering looking ahead?**

Participatory Evaluation

As well as finding ways for scholars to share their experiences as part of the data collection, we also want to ensure that scholars (past and present) are meaningfully involved in the evaluation process from start to finish. This includes identifying appropriate methodologies to use, helping with data collection, and making sense of the findings. To achieve this, we expect the successful evaluator to have experience of supporting meaningful participation and working with young people from different backgrounds.

In your bid, please outline ways in which you will identify scholars who want to participate in this work, and how you will engage them in the evaluation in an empowering way. We also want to know how you will ensure scholars from different backgrounds are all empowered to engage with this evaluation in whichever ways they want to.

We expect bidders to include provision for participatory activities in your delivery plan and budget. We also expect scholars to be remunerated appropriately for any work undertaken as part of your evaluation team.

Outputs

We would expect you to create outputs which will make the findings of the 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
- 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:

- Final report including recommendations for future development of Journey to Success
- Multimedia products that can be shared on a range of platforms (e.g. short film/series of short films)
- A learning event with stakeholders
- Summary products that outline recommendations for improving policy and practice (e.g. top tips around participation, mentoring, etc)

We expect the successful bidder to develop a plan for dissemination of evaluation findings in partnership with the scholars who are engaged in the work. This means that the outputs are unlikely to be finalised until the scholars have become involved in the

process. However, we would anticipate that a proposal for this evaluation will include an appropriate budget allocation for sharing findings.

Information you will have access to

Journey to Success already undertakes a number of light-touch evaluation activities. This includes feedback on different activities such as the self-development workshops, internships, and events. We have also conducted an internal evaluation of our previous lone-parent bursary scheme as a stand-alone project.

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.

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.

The Tender Process

Alongside a detailed explanation of how you will go about the evaluation project and meeting our evaluation needs, bids should also include:

- A risk register, with clear mitigation measures
- C.V.s 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 30 pages in length.

Timeframe

The proposed timeframe for this evaluation is between February - July 2023. We will be using and disseminating the findings from the evaluation in Summer 2023.

Value of the Tender

The value of this tender is £30,000 (plus VAT).

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 evaluation requirements of the project specification set out by The Robertson Trust	30%
Ability to deliver a creative and comprehensive approach to the evaluation that includes participatory approaches for engaging with our scholars and alumni, careful consideration of ethics, informed consent and protected characteristics.	35%
Ability to meet the timescales set out by the Trust (including a clear and realistic delivery plan with timelines that responds to the objectives and key deliverables of the contract).	15%
Ability to deliver a relationship management approach to engage with stakeholders involved in the evaluation and the work of Journey to Success (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	19 th December 2022
Notes of interest and questions received by prospective bidders	Thursday 12 th January at 12pm
Answers sent out to all registered bidders	By Wednesday 18 th January at 5pm
Submission of tenders to The Robertson Trust	Tuesday 31 st January at 5pm
Assessments completed and interview invites sent	By Monday 13 th February
Interviews with shortlisted bidders	Monday 20 th February
Bidders notified of outcome and successful bidder appointed	Friday 24 th February
Inception meeting	Wednesday 1 st March
Work to commence	Monday 6 th March
Update meetings	To be arranged in line with project plan
Interim report	Early May 2023
Final report	4 th July 2023

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

APPENDIX 1

Journey to Success – our current role

OUTCOMES	STAGE		
	Access	Participation	Progression
	<i>The things we currently do in Journey to Success to help people get into higher education (activities before they enter HE)</i>	<i>The things we currently do in Journey to Success to help people stay engaged in and complete university (activities during their time in HE)</i>	<i>The things we currently do in Journey to Success to provide people with the best chances of progressing into successful employment after their higher education is completed (activities during and after their time in HE)</i>
Have relevant educational attainment and work experience		<ul style="list-style-type: none"> • Internships • Giving back programme • Career pathways programme 	<ul style="list-style-type: none"> • Training sessions that help soft skills • Individual training sessions to help with interviews and applications • Individual career advice • Putting people in touch with mentors about how to access a specific sector • Internships and volunteering (during university and after graduation)
Have self-belief/ confidence (aspiration) and motivation	<ul style="list-style-type: none"> • Scholar Welcome Event (3 day residential) hosted by Outward Bound 	<ul style="list-style-type: none"> • Mandatory training session on self-development • Ambassador programme (to build leadership confidence) • Alumni mentees • General 1:1 support with J2S staff • Self-development awards 	<ul style="list-style-type: none"> • Training sessions that help soft skills (query – what are we defining as a soft skill) • Individual training sessions to help with interviews and applications • Writing references for people

Appendix 1

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		<ul style="list-style-type: none"> • Social media messages – promote businesses, mental health and wellbeing tips • Writing references for people • Annual gathering – scholars share experiences 	<ul style="list-style-type: none"> • Mental health support – referring scholars onto private therapists • Social media messages – promote businesses, mental health and wellbeing tips • Events where get a chance to talk to employers • Annual gathering – scholars share experiences • Guest speakers at the graduate lunch • Self-development awards • Ambassador programme – support leadership skills • Alumni programme
Have fewer experiences of poor mental health and wellbeing	<ul style="list-style-type: none"> • Provide access to Scholar Support and Wellbeing service online once offer has been accepted. 	<ul style="list-style-type: none"> • Signpost to university wellbeing and mental health resources (and other external resources) • Wellbeing Wednesday on social media • Life in Progress (EAP service for scholars) 	<ul style="list-style-type: none"> • Mental health support – referring scholars onto private therapists • Scholars support and wellbeing service – through ‘Life and progress’ • Social media messages – promote businesses, mental health and wellbeing tips

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		<ul style="list-style-type: none"> • 1:1 counselling for scholars if needs not met in other ways • Social media messages – promote businesses, mental health and wellbeing tips • Scholars being in touch with one another – peer support 	<ul style="list-style-type: none"> • 1-2-1 support from a member of the team or their ambassador • Scholars being in touch with one another – peer support (promote platforms for peer support and interaction)
Have required financial and material resources	<ul style="list-style-type: none"> • We promote our financial award to UCAS applicants from low progression schools 	<ul style="list-style-type: none"> • Bursary • Discretionary award(s) e.g. laptops • Paid internships • Advocacy from staff team to support scholars on individual matters • SAMH training for scholar ambassadors • Funding for participatory activities to help shape JtS • Leadership award – Ocean Youth Trust 	<ul style="list-style-type: none"> • Extend bursary to support postgrad study • Discretionary payments • Paid graduate internships • Alumni mentoring network – access to accreditation, careers advice
Are able to engage and stay engaged with school/university	<ul style="list-style-type: none"> • Advocating to universities to get early support for applicants. 	<ul style="list-style-type: none"> • Bursary • Training sessions • Mentoring 	<ul style="list-style-type: none"> • Extend bursary to support postgrad study

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<p>Are able to access good quality work experience</p>		<ul style="list-style-type: none"> • Mental health and wellbeing support • Signposting to specific services within university • Peer mentoring and support • Being able to put scholarship on hold and know they can take leave of absence • 1-2-1 support on changing courses • Advocating to university on their behalf if struggling academically • Flexibility with bursary payments 	<ul style="list-style-type: none"> • Support to take leave of absence - might need extension of bursary
		<ul style="list-style-type: none"> • Internships • Career pathways • Giving Back scheme (volunteering) • CV and interview prep (career support) • Informal introductions and networking opportunities 	<ul style="list-style-type: none"> • Promoting giving back via alumni, ambassadors (voluntary sector engagement) • Internships and volunteering • 1-2-1 support and training • Training sessions for soft skills

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Have strong meaningful relationships and role models	<ul style="list-style-type: none"> • New Scholars accessing university for the first time are matched with older Scholar Ambassadors as part of the induction. 	<ul style="list-style-type: none"> • Alumni mentorship programme • Scholar Welcome Event • Ambassadors programme • Career pathways • Mentoring from Royal Society of Edinburgh • Access to private therapists 	<ul style="list-style-type: none"> • Alumni mentoring • Leading by example – staff team developed good relationships • External mentoring (is this career pathways?) • Mentoring from Royal Society of Edinburgh
Are socially engaged and included	<ul style="list-style-type: none"> • Scholar Ambassadors organise social events for new campus groups. 	<ul style="list-style-type: none"> • Alumni mentorship programme • Welcome Event • Ambassadors programme • Career Pathways • Annual Gathering • Social media • Social interactions in training sessions – meet scholars from other universities 	<ul style="list-style-type: none"> • Annual gathering • Events – eg graduate lunch • Social media • Opportunities sent to final year students
Have strong and reliable relationships in the home/ family environment OR are able to manage the challenges within their relationships	<ul style="list-style-type: none"> • Signposting to university support for specific population groups. • Advocating to university services to get early support. 	<ul style="list-style-type: none"> • Life & Progress (EAP for Scholars) • Discretionary financial support • Access to mental health support 	

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		<ul style="list-style-type: none"> • Access to private therapists 	
They either don't have or are able to manage any additional financial or caring responsibilities and/ or challenges at home / within the family environment	<ul style="list-style-type: none"> • Signposting to university support for specific population groups. • Advocating to university services to get early support. • Emergency discretionary payments for new Scholars • 	<ul style="list-style-type: none"> • Signposting to organisational support for specific population groups • Bursary award • Internships • Advocating to universities to get support • Discretionary payments 	<ul style="list-style-type: none"> • Discretionary payments • Signposting on to support agencies • Signposting back to universities (eg accommodation)
Are able to access appropriate educational/ non educational experiences and support/ advice	<ul style="list-style-type: none"> • Information and support sessions about journey to success 	<ul style="list-style-type: none"> • Signposting to university services • 1:1 • Training sessions • Career Pathways • Welcome Event • Career Coaching (External) 	<ul style="list-style-type: none"> • Signposting back to universities (eg accommodation) • Discretionary support for training costs • Leadership awards
Have access to supportive networks	<ul style="list-style-type: none"> • Signposting to external partners and support agencies. 	<ul style="list-style-type: none"> • Peer-support of scholars – ambassador programme, training sessions • Life in Progress (EAP for Scholars) • Mentoring • Career Pathways 	<ul style="list-style-type: none"> • Peer-support of scholars • Scholar support and wellbeing service

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		<ul style="list-style-type: none"> • Career Insight sessions 	
Work is better paid and of a better quality		<ul style="list-style-type: none"> • Career Pathways • Paid internships 	<ul style="list-style-type: none"> • Paid internships • Career Pathways
Experience positive peer relationships at school/university	<ul style="list-style-type: none"> • Scholar Welcome Event • Scholar Ambassadors 	<ul style="list-style-type: none"> • Scholar Welcome Event 	<ul style="list-style-type: none"> • Peer support with other scholars
Removal of systemic barriers for certain individuals		<ul style="list-style-type: none"> • Bursary support and discretionary • Signposting on to support agencies • Signposting back to universities (eg accommodation, disability service) 	<ul style="list-style-type: none"> • Bursary support and discretionary payments • Signposting on to support agencies • Signposting back to universities (eg accommodation)
people don't experience cultural/ language barriers which prevent them engaging with education	<ul style="list-style-type: none"> • Inclusive Welcome Events • Advocating to universities for support 	<ul style="list-style-type: none"> • Refer back to university for additional support • Culturally sensitive counselling. • Refer to external support services 	<ul style="list-style-type: none"> • Refer to external support services • Culturally sensitive counselling. • Career Coaching



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