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Tender

## **Local Access Social Economy Evaluation**

Access - The Foundation for Social Investment

F02: Contract notice

Notice identifier: 2022/S 000-011967

Procurement identifier (OCID): ocids-h6vhtk-03355c

Published 9 May 2022, 12:24pm

### **Section I: Contracting authority**

#### **I.1) Name and addresses**

Access - The Foundation for Social Investment

8-10 New Fetter Lane

London

EC4A1AZ

#### **Contact**

Seb Elsworth

#### **Email**

[seb.elsworth@access-si.org.uk](mailto:seb.elsworth@access-si.org.uk)

#### **Telephone**

+44 2070846830

#### **Country**

United Kingdom

**Region code**

UKI31 - Camden and City of London

**Internet address(es)**

Main address

[www.access-si.org.uk](http://www.access-si.org.uk)

**I.3) Communication**

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://access-socialinvestment.org.uk/us/vacancies/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://access-socialinvestment.org.uk/us/vacancies/>

Tenders or requests to participate must be submitted to the following address:

Access - The Foundation for Social Investment

New Fetter Place, 8-10 New Fetter Lane

London

EC4A 1AZ

**Email**

[applications@access-si.org.uk](mailto:applications@access-si.org.uk)

**Country**

United Kingdom

**Region code**

UKI31 - Camden and City of London

**Internet address(es)**

Main address

<https://access-socialinvestment.org.uk/us/vacancies/>

**I.4) Type of the contracting authority**

Body governed by public law

**I.5) Main activity**

Economic and financial affairs

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**Section II: Object**

**II.1) Scope of the procurement**

**II.1.1) Title**

Local Access Social Economy Evaluation

**II.1.2) Main CPV code**

- 73210000 - Research consultancy services

**II.1.3) Type of contract**

Services

**II.1.4) Short description**

Access is seeking a long term evaluation partner to help us understand whether local social economies have been strengthened through our Local Access programme.

The evaluation will contribute towards our understanding of the following research questions and supplement data being collected through routine monitoring; a separate partnership/ process evaluation; and Places' own evaluation work:

1. How does providing support to individual charities & social enterprises through investment impact the growth & development of local social economies?

2. Is there an enhanced public service procurement role for the VCSE sector due to Local Access and is there increased enterprise activity in the social economy more generally?

3. How much capital has been leveraged into Places due to the work, including from co-investment and further funding attracted?

4. How does blended investment affect the financial resilience of recipient charities & social enterprises?

5. What is the added value and benefit of undertaking enterprise support and investment at a Place level

The full set of research questions will be agreed between Access and the appointed evaluator/s and are expected to fluctuate over time as programme delivery progresses

### **II.1.5) Estimated total value**

Value excluding VAT: £208,333

### **II.1.6) Information about lots**

This contract is divided into lots: No

## **II.2) Description**

### **II.2.2) Additional CPV code(s)**

- 73200000 - Research and development consultancy services

### **II.2.3) Place of performance**

NUTS codes

- UKC - North East (England)
- UKD - North West (England)
- UKE - Yorkshire and the Humber
- UKF - East Midlands (England)
- UKG - West Midlands (England)
- UKH - East of England
- UKI - London

- UKJ - South East (England)
- UKK - South West (England)

#### **II.2.4) Description of the procurement**

Access is seeking a long term evaluation partner to help us understand whether local social economies have been strengthened through Local Access.

Access and BSC have a full appreciation that shifts in local social economies take considerable time and can be very challenging to identify and attribute. Though one of the key aims of Local Access and, rightly, one of the primary ambitions of each Place, Access is only expecting there to be evidence alluding to modest shifts in the social economy. However, there are likely to be stronger indicators that things are moving in the right direction towards strengthened local social economies - for example through shifts in relationships or intentions of key local actors

The evaluation will lead our understanding of the following research questions:

1. How does providing enterprise support and investment to individual charities & social impact the growth & development of local social economies?
2. Is there an enhanced public service procurement role for the charity and social enterprise sector due to Local Access and is there increased enterprise activity in the social economy more generally?
3. What is the added value and benefit of undertaking enterprise support and investment at a Place level (and how does this compare to approaches taken by other Place-based delivery programmes)?

The evaluation will contribute towards our understanding of the following research questions:

4. How much capital has been leveraged into Places due to the work, including from co-investment and further funding attracted?
5. How does blended investment affect the financial resilience of recipient charities & social enterprises?

Note: Access and BSC acknowledge that the scope of proposed research areas is significant relative to the budget, the number of Places involved and the multi-year nature of the evaluation. Access and BSC intend to spend time providing support and steer to the appointed evaluator around prioritisation and realistic expectations against each research question. It is worth stating that one of the key benefits of this evaluation work is how it

adds value to the other MEL activity described in the full tender document. For example, the opportunity to directly talk to front-line organisations and the utilisations of existing external datasets. If you would like to discuss any of this prior to submitting a response please contact [sarah.colston@access-si.org.uk](mailto:sarah.colston@access-si.org.uk)

In some instances, the social economy evaluation will supplement the data already being collected through routine monitoring; the partnership/ process evaluation; and Places' own evaluation work. Where possible this other, existing data, will be shared with the appointed evaluator to contribute towards their assessment of change and impact. It will not however be the primary responsibility of the appointed evaluator to analyse those datasets - that will lie elsewhere.

The full and final set of research questions will be agreed between Access and the appointed evaluator/s and are expected to fluctuate over time as programme delivery progresses.

### Evaluation methodologies

It is anticipated that a range of qualitative and quantitative methodologies will be utilised in order to answer the Local Access Social Economy Evaluation research questions. We expect existing datasets (either publicly available or purchased) to play a key role in tracking long term shifts in local social economies. We also anticipate the need for direct conversations and engagement with front line organisations (including more in-depth case studies or interviews) in order to get under the skin of real changes on the ground for organisations within a place.

A table in the full tender document illustrates examples of the types of methodologies anticipated to be required. They should be read as suggestions only and different perspectives from evaluators are very much welcomed. This would include (but is not limited to) different existing models for conceptualising local economies.

Collaborative/ consortium bids are welcomed, particularly where they bring different expertise to research and evaluation techniques (for example quantitative experts versus more qualitative experts).

As stated above, some of the long-term ambitions of Places around shifts in the Local Social Economy will be challenging to detect given the time frame. Additionally, as stated earlier, Access acknowledges that there are significant asks from the research questions relative to the budget and multi-year, multi-place nature of the work. It is worth stating here therefore that there are expected to be variations in the "signalling effect" of the interventions based on the size of the Places and the significance of Local Access delivery within that Place. When considering evaluation work undertaken within Places therefore, Access is open to more focussed work in some Place locations where there may be more signalling effect considerations, versus other Places. This may assist with

allocating proposed evaluation budget across the Places (but is not an expectation

## Budgets & Timescales

Local Access is a ten year programme within each Place (with staggered start and end investment times but for the purposes of this document broadly from 2021 to 2031). Access are seeking a long-term evaluation partner from September 2022 until Dec 2027.

The emphasis on evaluation activity will shift over the 5 years. It anticipated there will be "peaks and troughs" rather than an equal level of activity each year. For example, Yr 1 is likely to involve heightened activity baselining up front. Towards the end of Year 4 and beginning of Yr 5 there is likely to be the main consolidation and reporting activity. There is still expected to be activity in the intervening years and at interim points throughout the contract duration, though this activity may want to take a "deep-dive" approach into specific research questions.

The Bidder's total costs must not exceed £250,000 (including VAT and expenses). Given the long-term nature of the Local Access Social Economy Evaluation (circa 5 years) this will broadly break-down to £50k per year - though as stated it is not expected to be so rigid in reality with peaks of activity being present in Yr1 and Yrs 4/5.

## Audiences

The primary audiences for the evaluation are;

- The six Places; Bradford, Bristol, Gainsborough, Greater Manchester, Hartlepool, Redcar & Cleveland and Southwark;
- Access and Big Society Capital;
- Capital Providers including DCMS, DLUHC, Treasury, the Reclaim Fund and National Lottery Community Fund;
- Place-based investors and partners;
- Local government;
- Foundations and their networks;
- Social sector infrastructure;
- Enterprise support organisations.

## Analysis and reporting

The specific nature of analysis and reporting will be agreed with the appointed evaluator. It is anticipated that there may be core elements that are tracked and repeated yearly and perhaps also specific one-off deep-dives into certain topics. As stated, towards the end of Year 4 and beginning of Yr 5 there is also likely to be the main consolidation and reporting activity drawing conclusions and evidence together from over the years. As also stated, data from the full suite of MEL activity described in Section 2 of the full tender document would be made available to the evaluator to triangulate and support their analysis but it would not be their responsibility to analyse and report on it.

#### **II.2.5) Award criteria**

Price is not the only award criterion and all criteria are stated only in the procurement documents

#### **II.2.6) Estimated value**

Value excluding VAT: £208,333

#### **II.2.7) Duration of the contract, framework agreement or dynamic purchasing system**

Duration in months

64

This contract is subject to renewal

Yes

Description of renewals

Access reserves the right to renew the contract beyond the stated term end, in the event that the programme is continuing

#### **II.2.10) Information about variants**

Variants will be accepted: Yes

#### **II.2.11) Information about options**

Options: No

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## **Section III. Legal, economic, financial and technical information**

### **III.1) Conditions for participation**

#### **III.1.2) Economic and financial standing**

Selection criteria as stated in the procurement documents

#### **III.1.3) Technical and professional ability**

Selection criteria as stated in the procurement documents

### **III.2) Conditions related to the contract**

#### **III.2.3) Information about staff responsible for the performance of the contract**

Obligation to indicate the names and professional qualifications of the staff assigned to performing the contract

## **Section IV. Procedure**

### **IV.1) Description**

#### **IV.1.1) Type of procedure**

Open procedure

#### **IV.1.8) Information about the Government Procurement Agreement (GPA)**

The procurement is covered by the Government Procurement Agreement: No

### **IV.2) Administrative information**

#### **IV.2.2) Time limit for receipt of tenders or requests to participate**

Date

17 June 2022

Local time

11:59pm

#### **IV.2.4) Languages in which tenders or requests to participate may be submitted**

English

#### **IV.2.7) Conditions for opening of tenders**

Date

20 June 2022

Local time

9:00am

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## **Section VI. Complementary information**

### **VI.1) Information about recurrence**

This is a recurrent procurement: No

### **VI.4) Procedures for review**

#### **VI.4.1) Review body**

Access - the Foundation for Social Investment

London

Country

United Kingdom