

Invitation to Tender

Evaluation of The Heritage Trade Up Programme

Deadline for receipt of tender proposals: 5pm on Friday 23rd April 2022

Anticipated contract start date: early May 2022

Work anticipated to have concluded: November 2022

Budget: £8,750 (inclusive of VAT)

Introduction

The School for Social Entrepreneurs (SSE) are looking to appoint an external consultant(s) to undertake an evaluation of The Heritage Trade Up Programme.

The Heritage Trade Up Programme is led by the School for Social Entrepreneurs and is funded through the National Lottery Heritage Fund to help create a more resilient and entrepreneurial Heritage sector. This was a brand-new programme which commenced in October 2021 with delivery running until June 2022. The programme is delivered across four areas covering London, Midlands, Scotland, and Yorkshire/North East, however, the programme has a national mandate - including all four countries of the UK.

We are looking to appoint an external consultant(s) with experience of working in the social enterprise sector and/or heritage sector.

The School for Social Entrepreneurs

We can't fix issues like poverty, climate change and ill-health alone. That's why the School for Social Entrepreneurs exists. We help 1,000 people a year develop the skills, strengths and networks they need to tackle society's biggest problems. We run courses that equip people to start, scale and strengthen organisations that make a positive difference. But we're not a traditional school. Learning with SSE is inspiring, action-based and accessible. We support people in other ways too, such as funding and mentoring.

SSE invest in individuals from all backgrounds who have practical ideas for change. There is no typical student at the School for Social Entrepreneurs; the people who attend programmes range in age from 17 to 74.

Lord Michael Young founded SSE in 1997, and we have grown to a network of schools across the UK, Canada, and India. Together, we are changing lives and transforming communities. <https://www.the-sse.org/>

Firstly, our commitment to inclusion

Diversity is a fact of life. Inclusion is a choice and a practice, for organisations and individuals. At SSE, our aim is to drive inclusion into every area and activity of what we do: from access to programmes, to grant investment, to board, staff, and partnerships. However, you identify, we would like to hear from you in response to this invitation to tender. In our commitment to continue to diversify those we work with, and for this evaluation opportunity in particular, we are especially keen to hear from those who identify as being from Black and minoritised ethnic backgrounds, LGBTQ+ and those with disabilities.

Background and context

The Heritage Trade Up Programme is led by the School for Social Entrepreneurs and is funded through the National Lottery Heritage Fund to help create a more resilient and entrepreneurial Heritage sector.

The programme supports a broad spectrum of heritage organisations. When recruiting we were especially keen to support those that represent the underrepresented, celebrate hidden histories, and who aim to strengthen and revive communities through heritage. The programme works with people across 52 heritage organisations.

The main outcomes for the programme are:

- Improved entrepreneurial skills to increase traded income and strengthen financial resilience.
- Engage a wider audience in heritage by expanding their reach and increasing social impact.
- The business, management, and leadership skills needed to innovate, prepare for future challenges, and create the change - within their organisations or externally - that they want to make.
- Grow their networks and develop their understanding of how and where to access support.

The programme is delivered through the eight learning days, and through additional webinars throughout the programme period. Participants also take part in Action Learning Sets, which support them to problem solve with their peers and a Residential to bring the different cohorts together. Participants also receive a Grant.

A Steering Group oversees the programme which supports programme design and recruitment efforts. The Steering Group represents a wide range of approaches to heritage from across the UK (including Northern Ireland!) and is comprised of 5 organisations / individuals. Our current membership is:

- Architectural Heritage Fund; pan-UK
- Black Cultural Archives; London based
- Heritage Trust Network; pan-UK
- An independent artist, heritage sector freelancer, diversity, equity and inclusion specialist, and SSE Fellow; Bristol based
- Work West; Belfast based

Evaluation purpose and objectives

Scope

SSE are looking to appoint an external evaluator to work alongside their Entrepreneurship Impact Lead and project delivery team to support the evaluation of the Heritage Trade Up Programme. The role of the evaluator will be to engage with programme participants, and other stakeholders such as the project steering group, to conduct a qualitative evaluation to evidence the impact of the programme, highlight the individual journeys of some of the participants and to ascertain the effectiveness of this programmes approach to design and delivery. They will combine this with the data collected internally to show the full scope and impact of the programme.

We conduct surveys with our programme participants capturing impact data over three main levels, as per the contracted programme outcomes and SSE's theory of change:

- For the individuals who have participated in the programme
- For their organisation
- For the wider sector

This information is collected at the beginning of the programme, at the end and again 12 months after the person has left the programme.

Purpose

We want to evidence and promote the impact of the Heritage Trade Up Programme over and above the qualitative data which we are collecting. We want to tell the stories of the people engaging with the programme and understand the impact that the programme has for them, as well as for wider stakeholders.

Key evaluation questions will need to be agreed through the development of the evaluation plan, but some ideas of areas that we are interested to explore through the evaluation are outlined below:

- The extent to which SSE has been able to deliver to the specific needs of participants. Is there anything special or innovative that SSE has brought to the programme, or could/should bring to this or other programmes in future?
- The extent to which aspects of programme design and delivery, including targeting, have been associated with positive or negative impacts on individuals, organisations, and communities.
- The extent to which our outcomes model (business skills, emotional resilience, leadership) is appropriate and reflective of the individual needs of these learners and their organisations.
- The extent to which organisations have been able to engage a wider audience in heritage by expanding their reach and increasing social impact.

Evaluation objectives:

1. To establish how successful we have been in meeting the aims of the programme
2. To establish the extent to which programme outcomes have been achieved, identifying critical success factors
3. To identify any unintended consequences or outcomes, positive or negative, to have resulted from the programme
4. To clearly articulate the difference the programme has made to individuals and/or the organisations in which they're working
5. To understand the impact of the steering group in relation to programme design and delivery

Use of the evaluation findings:

The evaluation is about continual learning. We are keen for the evaluator(s) to act as a critical friend, with an ongoing dialogue throughout. It is important that we share and embed the learning throughout the evaluation and include interactive ways of collecting learnings and applying them.

We will use the information generated through this evaluation to:

- Feed into and inform the programme level learning and delivery.
- Support our continuous learning and strengthen our knowledge base on the longer-term

- impact and outcomes of the programme.
- Share key outcomes and learnings with funders, stakeholders, staff, students, and Fellows.

Methodology

We are looking for an evaluation partner who can work collaboratively with SSE and key stakeholders in a rigorous yet engaging way.

Where possible, we are also keen for the evaluation methodology to be designed such that the evaluation itself adds value for participants on the programme. We are looking for creative, participatory evaluator(s) who can build rapport.

Applicants are asked to outline their proposed methodology for meeting the requirements of the evaluation. We see this as a qualitative evaluation as SSE already has a process in place for capturing distance travelled quantitative data to monitor progress towards specified outcomes. Internal evaluation data will be provided to the evaluator(s) for analysis and for inclusion in the final report. This internal data will need to be verified and triangulated (particularly with qualitative data) to understand not only what progress is being made, but also why progress is/is not being made and what lessons we might derive.

We invite you to come up with innovative ways to deliver case studies to illustrate the participant's journey, capturing specific examples of programme impact.

Evaluation guidance provided by the National Lottery Heritage Fund can be found here: <https://www.heritagefund.org.uk/funding/good-practice-guidance/evaluation-guidance>

Outputs and dissemination

Outputs

Required deliverables are as follows:

- Evaluation plan, due end mid/end May 2022, confirming key evaluation questions, methodology and timeframes
- Several case studies (final number to be agreed) throughout the contract period to be used externally by SSE
- A final report and presentation of the qualitative and quantitative data collated throughout the evaluation, including some key learning points identified.

Timetable, budget, and project management

Our timetable for this work is full project completion by the end of November 2022.

The budget you submit should include all expenses, such as design/print costs. Please indicate in your proposal if you have in-house design capabilities (and cost this into your proposal) or whether we will need to work with a separate design agency (at extra cost) - please also indicate if your costs are exclusive/inclusive of VAT (if applicable).

Attendance at some internal programme meetings may be required. Within SSE, day to day communications and management of the evaluation project will be led by Sean Gladwin, Entrepreneurship Impact Lead, and Dena Dalton, Entrepreneurship Delivery Lead.

Your submission

SSE invites organisations interested in tendering for this work to submit a proposal by 5pm on Friday 23rd April 2022. Proposals should be sent to Sean Gladwin, Entrepreneurship Impact Lead at SSE who is managing the selection process, at sean.gladwin.sw@sse.org.uk. Please ensure you include the following wording in the subject heading of your email: “Tender for Qualitative Evaluation of SSE Heritage Trade Up Programme”. If shortlisted, you may be invited to a virtual meeting.

Your proposal should outline:

- Why you are interested in working with SSE on this project.
- Your proposed methodology and outputs.
- A suggested engagement strategy for the project.
- A brief biography of the team who will deliver the work, including brief CVs and examples of relevant previous contracts team members have undertaken (e.g., evaluation studies, work on social entrepreneurship).
- A breakdown of costs by activity, showing the day rate for each team member. Please indicate if your costs are exclusive/inclusive of VAT (if applicable).
- Any added value you can bring in relation to dissemination of the evaluation outputs.
- The date your team would be able to start work on the project, and an indicative timetable for delivering the key elements of the evaluation (to be finalised through the evaluation plan).
- Details of two referees for work in a similar field you would be happy for us to approach.

Your response should be no more than 6 sides of A4, excluding any appendices, and no less than 11pt font.

SSE is committed to undertaking a rigorous independent evaluation of this programme. However, we are also mindful that our work at SSE and through the social entrepreneurs we support should be creative, inspiring, and exciting. Priority will be given to bidders who can effectively combine the dual qualities of rigour and creativity in how this project is delivered and the outputs produced.

If you have any questions whilst preparing your response, please do not hesitate to get in touch with Sean Gladwin on sean.gladwin.sw@sse.org.uk