



Foundation

## Invitation to tender

### Learning partner for the Carbon Innovation Fund 2 (CIF2)

#### Questions and answers

##### 1. Roles and approach

- **What is the responsibility of the learning partner in supporting the 'collecting and reflecting' work of individual-funded organisations and the production of reports documenting this process? Will there be a review of the overall programme that looks across the work of all the funded organisations and if so, who is responsible for producing this output?**

We would like the learning partner to have a mentoring role to the funded partners on how they evaluate the impact and reflect on their work. The funded partners will be responsible for collecting the data and writing the reports for their projects' impact. Funded projects are advised in their applications to dedicate resources to this.

In the Invitation to tender (ITT) we have included overarching research questions about the programme that we expect the Learning partner to answer i.e.

- What impact can we achieve with this funding?
- What difference has the capacity building offer made to partners?
- How have networking opportunities during CIF2 influenced partners?
- To what extent have the funded projects /ideas progressed beyond their pilot phase. Please note, all funded projects are expected to have completed a pilot stage before applying.
- What are the unexpected positive and negative outcomes from the grants?
- What are the main barriers (including barriers to scaling up) and enablers that grantees have experienced during the grant period and since?

We would like the learning partner to review the overall programme and produce a final report that will answer these questions. We are open to suggestions on how this report would look. At this stage we are looking for the bidders to suggest what reports/outputs they feel it is appropriate to produce. We understand that the budget creates constraints, and we feel the research proposal should be proportionate. We are purposely not being prescriptive at the moment e.g. for the number of reports the Learning partner produces, how these would look like etc.

The funded partners will also steer this work after they receive their funding; hence there should be some flexibility for learning reports/activities to be added during the implementation of the funding programme. We hope to develop a trusting and collaborative relationship with the Learning partner so that we produce learning that will be useful for the partners and the farming sector, within the allocated budget.

- **Beyond CIF2 and its grantees is there any expectation of engagement of young people in this work?**

There is no expectation to involve young people in this work at this point and we don't expect the Learning partner to factor this into their proposal. Co-op and Co-op

Foundation are committed to working with young people through various other strands of activity.

- **What role would Co-op and Co-op Foundation want to play in delivering the outcomes of this work (e.g. co-design approach, convening and support of grantees etc)**

We expect to work collaboratively with the Learning partner to develop the approach. The Learning partner will be responsible for the delivery of the activities and the Co-op Foundation will join in and help where appropriate. As an organisation we work co-operatively with our partners whether it is consultancies we contract for services or our funded partners.

- **Can you confirm that the Coop Foundation is the only funder involved when the ITT refers to the funder?**

Co-op Foundation and Co-op are co-funding the Carbon Innovation Fund. We are working closely in the development, delivery and learning and evaluation of the Fund. Co-op Foundation is responsible for the day-to-day delivery of the Fund and overseeing the Learning and Impact. Both funders collaborate closely, including joint decision-making for the commissioning of the Learning partner.

## **2. Learning partner's role in the decision-making on the grant applications**

- **What role would you like the learning partner to play (if any) in supporting decision making on the grant applications submitted, and at what stage in the application process?**
- **Would the selected Learning Partner be required to join the assessment calls? - We would be more than happy to join the assessment calls and feel we could add value here but require clarity on whether this is required as it will have implications on our intended approach.**

At this point, we have only planned the Landscape analysis and evidence review of the Learning partner to inform the grant decision-making. We haven't considered involving the Learning partner in reviewing and deciding which organisations will be funded at the final stage. This is a possibility we can discuss with the Learning partner.

In the event that we agree that the Learning partner will be involved in the decision-making process of the grants, we will reimburse the Learning partner separately for their time and input.

We only expect the Learning partner to produce the Landscape review report and do a presentation for us to inform our decisions in the 2<sup>nd</sup> stage of the applications. FYI the 1<sup>st</sup> phase of the applications opens on the 1<sup>st</sup> of February and closes at the end of February. We don't expect the Learning partner to play any role in the 1<sup>st</sup> stage of the applications.

- **Under the deliverables section it suggests; "Draft structure of Landscape analysis and evidence review and slide deck presentation of preliminary findings to inform scoring, shortlisting and assessment calls with shortlisted organisations." - We believe these assessment calls are with those organisations the Co-op Foundation wishes to fund via CIF2, could you confirm whether this is correct?**

The assessment calls are with the organisations that we would like to fund via CIF2.

### **3. Phase 1 landscape analysis and evidence review**

- **We understand that the landscape assessment would focus on reducing reliance on imported soya-based feeds, fishmeal, and synthetic fertilizers. As well as an analysis of the alternatives I assume any assessment would also look at a broad range of systemic levers? E.g., technological innovation (alternative feeds/fertilizers), policy, market (e.g., behaviour change), and farming system levers (e.g., agroecological farming approaches)?**

It is important to note that the fund is not simply about alternatives but any mechanism that could reduce reliance.

- **How will the Phase 1 landscape analysis and evidence review will be used?**
  - **Preliminary report in March:**
    - **What level of detail are you expecting for the end of March deadline to informing scoring?**
    - **Do you expect these findings to be largely descriptive, or to include more explicit recommendations either of gaps needing to be filled, or of specific scoring or selection criteria to inform funding?**
  - **Final report in April:**
    - **Who are the primary audience(s) for the final output at the end of April?**
    - **Will the selection of funded partners have been made by this point, or will the report be further informing that process?**
    - **To what extent is there a broader purpose for this output in terms of providing further contextual information for the Foundation and the funded partners?**

We do not expect a preliminary report in March. We expect a slide-deck summarising key findings that will also include strengths and gaps needing to be filled. We would also like to see a suggested structure for the report but not populated with content. We don't anticipate the slide deck to include scoring or selection criteria but we would like the findings to inform our criteria.

The ITT specifies the audiences of the Learning and evaluation. The primary audiences for the report in April are the Co-op and Co-op Foundation and CIF2 funded partners and secondary audience the farming sector and other interested stakeholders. We consider the Landscape analysis and evidence review to provide further contextual information for the Foundation and the funded partners.

The selection of the 1<sup>st</sup> stage of the applications will be made in March. The selection of the final funded partners (2<sup>nd</sup> stage of the application) will be made mid-June. The report will inform the 2<sup>nd</sup> stage applications selection.

### **4. Dissemination and sharing of learning, audiences for the Learning**

- **Is the landscape analysis an internal report only or do you anticipate sharing some of executive summary the findings of the report externally (i.e., to CIF2 applicants or more widely to the farming community)?**

We would like the landscape analysis to be an external report as we are keen to share our learnings with other stakeholders to inform their practices and policies. We aim to publish the whole report rather than just an executive summary.

- **Do you envisage the learning partner undertaking any external communications to share learnings more broadly beyond the core CIF2 partners (i.e., with broader farming community through social media, blogs, conferences etc)? Or would this be led by the Foundation?**

We would like the sharing of learning to be in collaboration between the Learning partner and the Co-op Foundation. The communications plan and activities are a critical aspect of this contract that we will co-design and co-deliver with the Learning partner.

- **Who are the primary intended users of this learning and what are their intended uses of that learning?**

The primary users of the learning are our funded partners, Co-op Foundation and Co-op. Our funded partners will use the learning to inform the set up and delivery of their project and improve their practice during their project duration.

Co-op Foundation and Co-op will use the findings of the Landscape Analysis and evidence review to inform our decision making for the grant awards.

Our secondary audiences for this piece of work are the farming sector and other stakeholders such as funders who fund in this area of work. We would like our learning to be used to inform their practices in the future.

- **Do you really want a learning report, or would you be open to co-created data points that partners and industry commit to working on together, that has legs beyond outputs from this project?**

We are open for the bidders to suggest the format of the learning outputs. We would welcome creative ways to communicate and share the learning of this work to maximise its use and impact.

## **5. Phase 2: Support to partners, Co-op and Co-op Foundation on Learning and Impact**

- **Do you have any expectations as to whether mentoring sessions with individual projects should be held physically or virtually (or a combination of both)?**

It is up to the bidders to suggest what is appropriate and feasible (given the allocated budget) regarding the mentoring sessions. From our experience and talking to other funders, we have found that a face-to-face meeting at the beginning of establishing a good working relationship is beneficial, whilst the subsequent meetings/sessions can take place online. The budget for face-to-face mentoring meetings should be included in the budget of this contract.

## **6. Eligibility**

- **Could you let us know if applying to be the learning partner for CIF2 would exclude an organisation from applying for funding from CIF2?**
- **If an organisation were to win phase 1 and or phase 2 would it exclude them from being able to either lead or partner in a grant application under this call.**

Organisations cannot both receive CIF2 funding and be the learning partner. This is to avoid a potential conflict of interest.

If you submit a proposal to be a learning partner and are unsuccessful then you can apply for CIF2 as a project to be funded.

## 7. Forming a team or a partnership to deliver the work

- **We may want to partner with another organisation that has received a grant from CIF Round 1. Would this mean that they are conflicted out of applying to this ITT?**

Partnerships can include organisations that have received a grant from CIF Round 1.

- **Are you thinking this would just be a team or an individual? Normally for something like this we would assemble a small team.**

We would encourage the formation of a team or partnership to deliver this work as it requires a variety of skillsets.

## 8. Expertise and experience of the Learning partner

- **Understanding of grant making/philanthropies - what kind of experience are you looking to applicants to demonstrate? We have worked with foundations to develop both grantmaking strategies and MEAL frameworks and rubrics, to design specific funding collaboratives, developed a system change learning course specifically for investors in change, and we have small scale experience of supporting grantees. As an organisation our main source of philanthropic income is from foundations and so we also bring the grantee perspective. How far is this aligned with what you are looking for?**
- **Impact and evaluation skillset -we use a developmental evaluation approach incorporating systems learning and MEAL practices such as action learning and most significant change. Does this align with the skillset you consider appropriate, or are you looking for applicants to demonstrate that project staff have more traditional quantitative and qualitative evaluation qualifications?**

The first phase of this work will require research skills. Knowledge of the farming sector would be invaluable (especially in the area of reducing reliance on soy-based feed and synthetic fertilisers). The second phase of this work will require research, evaluation, mentoring and facilitation expertise and will take place after grants have been awarded. We have an explicit criterion which we will use to evaluate the proposals:

*To what extent does the ITT response demonstrate relevant experience in conducting landscape analysis, conducting monitoring learning and evaluation and facilitating peer/network learning?*

The understanding of grant-making/philanthropies is not critical. Still, we anticipate it will be useful for writing an application that will demonstrate an understanding of the aim, objectives and key questions and will help you develop a methodology appropriate to answer the research questions.

Action Learning and Most Significant Change are methods that will be appropriate for answering some of the research questions. We also expect the Learning partner to support the projects to measure their impact through mentoring and training. This may require quantitative research skills.

## 9. Track record and references

- **We would envisage one referee on our technical/content knowledge on feed, and one around learning and MEL capabilities. However, if you have a different preference (e.g. both referees to focus on learning and MEL), please can you let us know.**

Having two referees for different aspects of your expertise would be great.

## 10. Measures of success for the Learning partner's work

- **How do you know that they/you/we have been successful? What are your quantitative and qualitative measures of success for our involvement and how and when will they be measured?**

Overall success for us will be that the Learning partner will have fulfilled the aim and objectives included in the ITT. As a foundation we want to turn learning into actions for greater impact. We would like this process to help us be an evidence-based funder (by informing our decisions with evidence). Hence the quality of the Landscape analysis and evidence review report is critical. We also want the learning to be useful for our partners. Thus, one of the indicators of success for us is seeing that our funded partners will be engaged in the learning process, and we will find that they will have improved their practice as a result of this.

## 11. Budget

- **The scope of work is quite extensive for the budget available. You kindly indicate the kind of activities you would like to be delivered for this. It would also be useful to understand the depth and reach of engagement you expect with the Fund's team and grantees.**

We would like the bidders to let us know what they feel is achievable within the allocated budget. As an organisation, we advocate for fairness; hence we are not looking for a proposal that will overpromise on what can be delivered within the allocated budget. For example, we are not expecting the Learning partner to do fieldwork to collect data on the ground for every project about their impact. We expect the partner to mentor and train the funded partners to collect the primary data on how their project progresses.

- **Do you require a breakdown of what is included in day rates?**

Please use the template we have included in the ITT to submit your budget which does include indication of day rates

**TABLE A: (firm and fixed costs)**

Cost	Post 1 cost per day (No of days) e.g. Project Manager/Director @ £2	Post 2 cost per day (No of days) e.g. Senior Consultant/manager/researcher @£1.5	Post 3 cost per day (No of days) Junior Consultant /equivalent e.g. £1	Total days	Total fees
Inception meeting to agree plans and finalise requirements	Example 0.5	1	1.5	3	£4
[Add as necessary]					
[Add as necessary]					

- **In the ITT there is a fixed costs table (Table A, page 11). Please could you confirm if that table needs to be included in the 10 pages of the proposal or can be as an appendix? And could you confirm the level of detail expected in Table A (the ITT has an example of "the inception meeting" - are we expected to itemise every meeting or focus on the main workshops and for example a series of online sessions with the partners)?**

We would like the budget to be included within the 10 pages limit. We would like the proposal to include an indication of number of meetings and workshops as this has implications for the budget. We do not expect a detailed description of the focus of the workshops as we would like our funders partners to input in this.

- **What % of budget would you expect to be allocated to quality assurance?**
- **Our project management is usually 10% - is this within the 'appropriate allowance for management' you have in mind?**

We do not have standard policies in terms of percentages of costs that we would reimburse in contracts for quality assurance and project management. We would advise the bidders to include the actual costs for these activities. We understand these will vary from organisation to organisation.

- **We would need to include additional costs for partnership working between different organisations - would this be acceptable?**

We encourage bidders to apply in partnership. Please indicate what the partnership costs would be used for.

- **Any expenses e.g. travel and subsistence would be in addition to management costs - would this be acceptable?**
- **Should any travel expenses/venue hire costs associated with the two annual workshops be covered in the budget as part of the proposal?**

Travel and subsistence for meetings e.g. with funded partners and events should be included in the proposal as a separate item.

Travel expenses for the Learning partner's staff for the annual meetings should be covered in the proposal's budget. Co-op Foundation will cover the venue hire costs and food/refreshments for the participants attending the workshops.

- **VAT: We are VAT registered and will account for VAT as required according to the nature of the cost - is that all we need to include in the bid or is there something else you would want to see?**

The budget allocated for this contract is inclusive of VAT. Please include the VAT as a separate figure in your budget.

- **Can you give any indication of your expected split of budget between phases 1 and 2?**
- **A note in the tender invitation is that an organisation could choose to apply only for Phase 2. If an organisation were to only apply for Phase 2 of this work, what would be the maximum budget they could tender for? And what else would you want to see from a bid only focusing on this part of the work?**

We welcome applications only for one of the phases of this project. We would expect the budget for each phase to be proportional, considering the timeframe as well. For example, the Landscape Analysis and evidence review will take place over two months. We would advise allocating budget between £10,000-£20,000 for the Landscape analysis and evidence review.

The ITT includes our expectations for the 2<sup>nd</sup> phase of this work. We do not have any additional expectations in relation to the bid if an organisation chooses to apply only for the 2<sup>nd</sup> phase.

## 12. Format for submitting proposals and page limit

- **Is there an application form as such or whether you require that we respond to the areas outlined in the ITT.**

There is no application form. All our proposal requirements, including page limit, are set out in the ITT.

- **There is a 10 page maximum limit. We would also like to include a cover page, does the 10 page limit include a cover page or exclude it?**

Bidders can include a cover page in addition to the 10-page limit.

## 13. Timeline and important dates

- **The date for submission of the tender response seems to be a Sunday (29<sup>th</sup> of Jan). I just wanted to check whether this was correct?**

There has been an error in the dates included in the timeline. The amended timeline is included in the table below. Deadline for submitting proposals: 31<sup>st</sup> January 2022

#	Activity	Date
1	ITT issued to Suppliers	19 December 2022
3	Submission of Supplier Q&A to Co-op Foundation	15 January 2023
4	Return of Supplier Q&A to Suppliers	23 January 2023
5	Submission of ITT Response	31 January 2023
6	ITT Evaluation Period	31 January to 10 February 2023
7	Clarification meetings <b>may</b> be held with shortlisted suppliers	15 February 2023
8	Notification of Contract Award	20 February 2023
9	Contract finalising	20 to 24 February 2023
10	Contract start date	27 February 2023

- **Do you have any indication of when Phase 2 will start? We are assuming it will begin within a month or two of Phase 1, but if you could clarify that would be great.**
- **Our understanding is that the programme is two years, so could you confirm if that timeline is additional to Phase 1?**

Phase 1 will take place between March-April 2023.



Grants will be awarded in August 2023 and projects will need to start by March 2024 the latest. The delivery of Phase 2 for the Learning partner will start from August onwards when the awards of the successful partners will be made. We expect detailed planning for the delivery of Phase 2 could start from June onwards.

We have allowed the funded partners to indicate the duration of their project. We would like the Learning partner to be able to support the funded partners for up to 2 years max i.e. February 2026.

#### **14. Carbon Innovation Fund Round 2 grant application dates**

- **When are CIF2 applications opening?**

The first stage for applying for a CIF2 grant is opening on 1<sup>st</sup> February and closing 28<sup>th</sup> February. We're running [a webinar on 1 February](#) where we'll share more information on CIF2 and how to apply for a grant.