



Foundation

Invitation to tender (ITT)

Future Communities Fund Round One learning partner

1. Invitation to tender background

1.1 Introduction

We're the Co-op's charity, and we're co-operating for a fairer world. We believe co-operation is at the heart of strong communities, and this makes us a different kind of funder. We work closely with communities, we listen, and we learn. We unlock communities' power by focusing on those who have most at stake.

This ITT is to commission a learning partner for Co-op Foundation's Future Communities Fund (FCF) Round One. The learning partner is expected to play a critical role in achieving the ambitions of the fund. The work will comprise looking at other funders' good practices in evidencing the impact of unrestricted funding, co-creating with funded partners a learning and evaluation approach that is proportionate and useful for the funded partners, facilitating learning events for the funded partners and collating the impact and learning of the programme. This work requires co-creation, evaluation and facilitation skills.

The primary audiences for this piece of work are the funded partners¹ of the Future Communities Fund Round One, Co-op Foundations' team and board of trustees, Co-op colleagues and Co-op members. The secondary audience for this piece of work is other funders.

1.2 The context for this work

Our £1.5m Future Communities Fund (FCF) is the first strategic fund launched under our ['Building communities of the future together'](#) strategy. The following principles underpin our approach to funding under our strategy:

- **Participatory** – grant-giving has been led by our [Future Communities Collective](#). This is a group of diverse young people who provide and embed a youth perspective into how we deliver on our new strategic priorities.
- **Unrestricted** – we're funding organisations, not projects.
- **Long-term** – we're providing funding for up to five years.

¹ At Co-op Foundation, aligned with our co-operative values, we use the term 'funded partners' when we refer to the organisations we fund.

- **Trusting** – we'll work with our partners to understand how our funding can increase their impact.
- **Accessible** – we introduced a two-stage application process for this fund and pledged to be honest and open with applicants as we trial new ways of working. This aligns with our [IVAR commitments](#).
- **Supportive** – we're here to support charitable organisations to be the best they can be in whatever way we can. That's why we're funding them flexibly and amplifying the work that they do.
- **Facilitating co-operation** – we'll help to facilitate connections between groups so our partners can achieve more, learn together and co-operate for a fairer world.

FCF was launched in November 2022. It brought together two strategic priorities from our youth-designed [Future Communities Vision](#) – 'youth activism and shared power' and 'diversity, equity and inclusion'.

Our working definition of 'diverse' is people who have experienced being marginalised in society due to their race, gender identity, sexual orientation, disability, socioeconomic status or any other attribute that impacts their inclusion.

FCF Round One was the first fund under our new strategy, in which we adopted a participatory grantmaking approach. In particular, we are committed to involving people from the communities we work with in decisions about how to use our funds. We are drawing on our co-operative values of democracy and self-responsibility to help address the power imbalance in traditional grant-making.

For the FCF Round One we brought together a group of seven diverse young people who formed the [Future Communities Collective](#). The Collective was facilitated by [HUDL Youth Development Agency](#) and members led on allocating the funding of the FCF Round One, including shortlisting organisations, designing the decision-making process and deciding which organisations will be funded in collaboration with two of our trustees. Two members of the collective are now also part of the commissioning process of the learning partner, who will be responsible for sharing the learning and demonstrating the impact of the FCF Round One.

1.2.1 Focus and Theory of Change of the Future Communities Fund Round One

The fund is focused on two of our strategic priorities. In particular, it offers unrestricted grants to support voluntary organisations building communities that are:

- Diverse, equitable and inclusive
- Prioritising youth activism shared power and transparent governance.

During the design of the fund, a theory of change was created with input from the Co-op Foundation funding team and the Future Communities Collective. We expect the Theory of Change to be refined and updated by the funded partners as part of co-creating the fund's learning and impact approach. The draft theory of change is included in the

Appendix and presents the short, medium and long-term outcomes the fund is expected to achieve overall.

1.2.2 Funded organisations

FCF offers unrestricted funding of up to £30,000 annually for up to five years. Eligible organisations had to:

- be working to help diverse young people to become leaders and activists.
- Have an annual turnover of £250k or less at the point of application.
- Have young people's voices from all backgrounds and abilities at the core of their delivery
- Advocate for diversity, equity and inclusion in all areas of society
- Actively engage with young people from diverse communities in a meaningful and inclusive way
- Have experience in removing barriers and providing opportunities for young people
- Have experience in delivering meaningful youth social action which supports young people into leadership roles, and
- Be able to demonstrate they have experience in co-operation/collaboration

The list of funded organisations and the level of funding and duration are presented in Table 1. More information on our FCF Round 1 partners' work is summarised on [our website](#).

Table 1: FCF Round 1 funded partners, level of funding and duration

Organisation	Funding duration	Total funding
21 Together (Maidstone, England)	Five years	£150,000
Friends of Romano Lav (Glasgow, Scotland)	Five years	£97,500
The Gina Project (Birmingham, England)	Five years	£132,842
Girls Into Coding (London/nationwide)	Five years	£75,000
North West Migrants Forum (Derry, Northern Ireland)	Five years	£150,000
Nurturing Foundations (Manchester)	Five years	£150,000
Reestablish (Leeds)	Five years	£140,000
The RISE Collective (Bristol)	Three years	£30,384

RJ Working CIO (Redruth, Cornwall)	Five years	£107,000
Roar Pursuits CIC (London)	Five years	£150,000
Skills and Volunteering Cymru (Cardiff, Wales)	Three years	£90,000
Step Now Global CIC (London)	Three years	£52,000
Youth Work Unit Yorkshire and Humber CIO (Leeds)	Five years	£60,000

2 FCF Learning partner

2.1 Role of the Learning partner and overall aim

The Co-op Foundation is looking to engage a learning partner as part of delivering the FCF Round 1 and supporting the funded partners.

The role of the learning partner is to act as a learning and impact expert, facilitator of a co-creation process of learning and impact, peer learning facilitator and communicator.

The term 'learning partner' is used instead of 'evaluator' or 'researcher' deliberately. We are not asking for an evaluation that establishes some key impacts of the FCF Round One work at a set point in time, followed by a time-limited attempt to communicate this. We are looking for a dynamic rather than static approach: an ongoing learning process of 'collecting and reflecting' with specific outputs yet to be negotiated between the partners. This could be delivered by an independent consultant or partnership, research company, academic department or any similar organisation.

We have funded a range of organisations that work strategically in the intersection of our two priorities, i.e. diversity, equity and inclusion and youth activism and transparent governance. We consider it critical for the learning partner to have expertise in these two areas of work and we value the learning partner to consist of a diverse team.

The aim of the learning partner support is to demonstrate the impact of the FCF Round One, explore the effectiveness of the funding approach, create peer learning opportunities between funded partners and share learning externally to influence the wider funding sector.

2.2 Objectives

In more detail, we anticipate the learning partner to achieve the following objectives:

- To identify good practices, successes and challenges in demonstrating the impact of unrestricted funding based on other funders' examples.
- To co-create with funded partners and the Co-op Foundation the learning and impact approach for demonstrating impact and sharing learning from the FCF Round One.

- To create opportunities for peer learning and develop a community of practice between funded partners.
- To support the Co-op Foundation to refine our grant-making approach for the forthcoming rounds of the FCF.

2.3 Key questions for the learning and valuation

We expect the learning partner's work to help answer a set of learning questions to improve the practice of the funded partners, the Co-op Foundation, and other funders. The Future Communities Collective and the Co-op Foundation team have identified some indicative questions listed below. We expect the learning questions to change based on input and priorities set by the funded partners as part of co-creating the learning and impact approach. We anticipate the learning partner to engage with funded partners to generate new or reword current learning questions. We are open to the bidders suggesting narrowing down the learning questions.

Other funders

- How do other funders evaluate the impact of unrestricted funding?

Co-op Foundation

- What perceptions, skills, and behaviours need to change at the Co-op Foundation as a funder as we move into unrestricted funding and adopting participatory grant-making?
- What are key learnings from the FCF Round One (e.g. from the application, monitoring and any funder plus support) that can help the Foundation improve the delivery of our strategic funds and inform CFC Round Two?
- How can the Foundation build stronger trusting relationships and partnerships with the funded organisations through unrestricted funding?
- How can the Co-op Foundation and other funders support young people to navigate barriers to engagement e.g. with the organisations we fund?

Funded partners

- What challenges do organisations with a lower turnover face that need additional support?
- What did the unrestricted funding enable the partners to do that they couldn't have achieved without it?
- How does offering unrestricted funding helps achieve funded partners' organisational outcomes and help partners to improve young people's outcomes?
- How does involving young people in governance impact an organisation's ability to deliver its mission successfully?

Young people supported by the funded partners

- How is unrestricted funding for partners, in comparison to project funding, influencing services to young people?
- How do young people feel they benefit from the funding? To what extent do young people see a change/improvement in the support provided to them after the organisation receives the funding/
- How are young people paid/ rewarded when they hold leadership positions e.g. for work they carry out for organisations etc.?
- What roles do young people typically hold in funded partners, and how are they trained to fulfil leadership positions?
- What are the power dynamics that need to be considered when involving young people in governance or decision making roles?
- What are the barriers to engaging young people in positions of power, and how can these be overcome?

2.4 Approach

We encourage the bidders to suggest creative and innovative ways in their proposals on how to undertake this work. In this section, we articulate some of the activities this work will involve. Building our approach based on other funders' practices of evaluating and learning from their unrestricted funding is crucial. After looking at the good practice of measuring unrestricted impact from other funders, we expect the Learning partner to support funded partners to co-create the learning and evaluation across the fund. The approach needs to be aligned with the eight [IVAR commitments](#) of funding charities in an open and trusting way that the Co-op Foundation has signed up to. For example, the approach needs to be proportionate to the level of funding the organisations receive and to involve asking relevant questions useful to the funded partners. We also acknowledge that we can only evidence the contribution of our funding to the organisations' work and impact rather than attribute impact to our funding.

The learning partner will support the funded partners to refine the programme's theory of change and the learning questions.

Funded partners in their grant agreement have been informed that a learning partner will be commissioned to help identify the impact of the FCF Round One and share learning between the funded partners and beyond.

By signing their grant agreement, funded partners have committed to dedicate five working days per year to co-design the learning and impact approach, participate in one learning event annually, and support further learning and impact activities.

2.5 Additional requirements

We expect the learning and evaluation to be co-created with the funded partners and the Co-op Foundation. We are looking for a consultant/cy who has the following:

- Expertise in co-creating learning and evaluation approaches with funded organisations/charities
- Expertise in the areas of diversity, equity and inclusion and, youth activism, youth leadership
- An understanding of funding practices, grant-making, philanthropy and unrestricted funding, participatory grantmaking
- Expertise in impact assessment and monitoring, learning and evaluation approaches and methods
- Experience in facilitating peer learning between organisations (online and face-to-face) and developing communities of practice
- Excellent communication skills and producing an impactful report

We also expect the supplier's team to be diverse in membership and inclusive in practice. Diversity and inclusion are included in our scoring criteria.

3 Deliverables

We want all those involved with FCF Round One and beyond to have the opportunity to learn and reflect as their work in the intersection of our strategic priorities develops. Therefore, we anticipate that there should be opportunities to produce learning materials across the lifetime of FCF Round One and at the end. We do not want to pre-determine the content and format of these materials and are open to producing a wide range of formats that meet different partners' needs. A similar approach has been followed by the Blagrove Trust regarding the focus and content of the learning reports from the [Listening Fund](#) (e.g. see the fund's practice papers).

To commission a learning partner, we outline some key deliverables we anticipate being completed. These may change based on the co-creation process.

Deliverable	Deadline
20pp. publishable report summarising findings of study of funders' practices in evidencing impact of unrestricted funding.	End of January 2024
Presentation to the funded partners and the Co-op Foundation team of the study's findings	End of January 2024
Co-creation process to develop the overall funding programme's learning and evaluation approach. This will be informed by other funders' practice of measuring impact of unrestricted funding.	Dates to be confirmed (TBC)
Collating evidence of impact from the funded partners through analysis of secondary data or collection of primary	The timing/regularity of these reports will be determined by funded

data if needed. Written reports summarising impact (minimum two reports).	partners and the available budget. We are open for the consultant to suggest a realistic number of reports within the allocated budget.
Funded partner annual learning events (co-created with the funded partners). The first learning event will take place in early 2024, face to face. The remaining can be virtual events.	Dates TBC based on input from funded partners-e.g. scheduled towards the end of each funding year.
Minimum two learning reports (contents and format of the reports to be determined in collaboration between the funders and partners). We welcome bidders suggesting how these deliverables may look like in their proposal and maintaining flexibility.	Dates TBC
Two reports on the effectiveness of the funding process including stages such as application, monitoring, any funder plus support if relevant etc.	February 2024 (first report, rapid review of FCF Round 1 to inform FCF Round 2) The timing of the 2 nd report will be decided in collaboration with the Co-op Foundation

4 Learning and evaluation audiences

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

- FCF Round One funded partners: We would like our funded partners to learn from each other's practice and to be able to articulate the impact/contribution of unrestricted funding.
- Co-op Foundation: We want to use the learning to improve how we support the funded partners and how we support organisations with unrestricted funding more widely.
- Co-op and Co-op members: We would like the Co-op Foundation's key stakeholders to be informed, understand and celebrate the contribution and impact of unrestricted funding.
- Other funders: We would like to evidence the impact and learning from giving unrestricted funding so that other funders will consider starting or increasing giving unrestricted funding. We would also like to share the evidence of impact with future potential investors and match funders who could support our strategic priorities.

5 Budget and timelines

The budget for this project is between £130,000 and £150,000 (inclusive of VAT) to be spent over approximately five years.

The budget should also cover all costs associated with quality assurance, proof-reading and design of the final outputs. An appropriate allowance for expenses and management time should be included. In presenting your budget, please indicate how you address VAT requirements. The costs of funded partners' participation in learning events are not expected to be covered by the Learning partner's budget.

6 Ethics

We expect the research to adhere to the Social Research Association (SRA) ethical guidelines and BERA guidelines.

7 Diversity & Inclusion

Diversity, Equity and Inclusion (DEI) is one of the Co-op Foundation's strategic priorities and we are committed to cultivating a fair and healthy environment for the people who work here and those we work with. As we learn more about barriers that disadvantage certain groups from progressing in our workplace, we will remove them. We would like to partner with suppliers who share our commitment to DEI. We will ask you questions related to DEI as part of our commissioning processes.

8 Time allocation and parameters

8.1 ITT Timeline

#	Activity	Date
1	ITT issued to Suppliers	31 August 2023
3	Submission of Supplier Questions to Co-op Foundation Contact	18 September 2023
4	Return of Supplier Q&A to Suppliers	21 September 2023
5	Submission of ITT Response	2 October 2023, 5 pm
6	ITT Evaluation Period	3-13 October 2023
7	Clarification meetings may be held with shortlisted suppliers	18-19 October 2023
8	Notification of Contract Award	20 October 2023
9	Contract finalising	23-26 October 2023
10	Contract start date	30 October 2023

8.2 Response submission and Format

Please submit your proposal by 5pm on 2 October 2023 through an email to Co-op Foundation's Funding and Partnerships Manager Wendy Reading wendy.reading@coop.co.uk

We would expect to see in the submitted proposal the following:

1. Description of your understanding of the learning partner's work.
2. Explanation of how your learning and evaluation approach and output design will meet the aims and objectives of this work and the characteristics set out in the deliverables section.
3. Detailed methodology for undertaking the work.
4. Description of anticipated risks and challenges and ways to mitigate them and quality assurance for your work. This should include mitigating potential issues in the continuity of personnel because of the length of the contract.
5. Details of staff allocated to the project, together with the experience of the contractor and staff members in carrying out similar projects, expertise in the thematic areas of this study (unrestricted funding, diversity, equity and inclusion, youth activism), skills and knowledge related to monitoring, learning and evaluation, facilitation skills (for co-creation processes and peer learning between organisations) and understanding of philanthropy. The project manager / lead contact should be identified.
6. A detailed budget including all costs, expenses and VAT, specifying all day rates of individuals involved, the allocation of days between members of the team, and the cost of particular activities.
7. A timeline for the work, including indicative key milestones and deliverables against each of these.
8. Contact details of two previous or current clients with direct knowledge or experience of your work relevant to this ITT. Please specify how the referees know your work and if they can be contacted by us straightaway.
9. Examples of similar types of work. These could be sent as a separate document/appendix to the proposal.

A proposal for undertaking the work should be no more than 10 pages. Submitting a proposal of more than 10 pages will automatically result in the rejection of the proposal.

We recognise that one individual or organisation may not feel equally able to deliver all strands of this work and are therefore happy to accept applications from a group of individuals or partner organisations. We want one of these individuals or organisations to be identified as the lead contact.

8.3 Supplier Q&A

Prior to the submission of your ITT response, Suppliers are provided the opportunity to submit any questions they have about the exercise. All questions are to be submitted to

the Co-op Foundation by e-mail to Wendy Reading, wendy.reading@coop.co.uk in accordance with the ITT timetable.

8.4 Scoring

Your proposal will be scored out of 100%. 90% of the marks will be awarded for quality, and 10% for price.

The proposal will be assessed against the following Quality Questions (90% of the total score):

Quality criteria & questions	Weighting
1. To what extent does the ITT response demonstrate a clear understanding of the aim, objectives and key questions, and main issues related to this study?	Weighting 10%
2. To what extent does the ITT response demonstrate relevant experience facilitating co-creation processes, facilitating peer learning and communications skills?	Weighting 20%
3. To what extent is the proposed methodology robust and appropriate to fulfil the aim of this work and answer the key questions?	Weighting 20%
4. To what extent does the ITT response demonstrate the supplier has expertise in the areas of unrestricted funding, diversity, equity and inclusion and youth activism/youth leadership?	Weighting 20%
5. To what extent does the tender response demonstrate a clear and realistic project plan, to successfully deliver the work to the budget and timetable required and a well-structured, diverse in membership team with clear roles and responsibilities?	Weighting 20%

The evaluation of price will be carried out on the Schedule of charges you provide in response to Table A. We expect that the budget allocation may change during the project's duration especially after the co-creation process completes.

Table A - Schedule of Charges

Please show in your proposal submission, the number of staff and the amount of time that will be scheduled to work on the contract with the daily charging rate.

Please complete the table below providing a detailed breakdown of costs against each description. Suppliers may extend the tables to detail additional elements/costs if required.

If VAT is chargeable on the services to be provided, this should be taken into account in the overall cost of this contract so please make sure to include that clearly in the budget.

Suppliers shall complete the schedule below, estimating the number of days, travel and subsistence costs associated with their proposal submission.

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]					

9 Accessibility

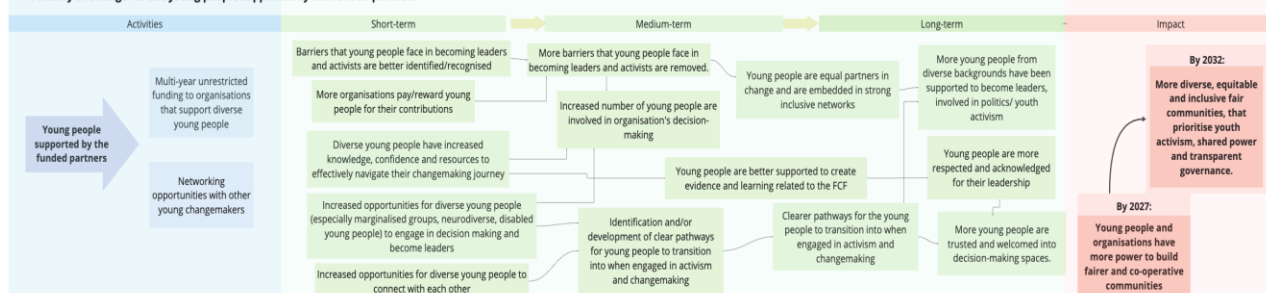
Co-op Foundation is committed to ensuring that our ITT exercises are accessible to everyone. If you have a disability or a chronic health condition, we can offer adjustments to the response format e.g. submitting your response in an alternate format. For support during the ITT exercise, contact Dr Asimina Vergou at asimina.vergou@coop.co.uk.

If, within the proposed outputs of this ITT exercise, specific adjustments are required by you or your team which incur additional cost then outline them clearly within your commercial response. Co-op Foundation is committed to evaluating all proposals fairly and will ensure any proposed adjustment costs sit outside the commercial evaluation.

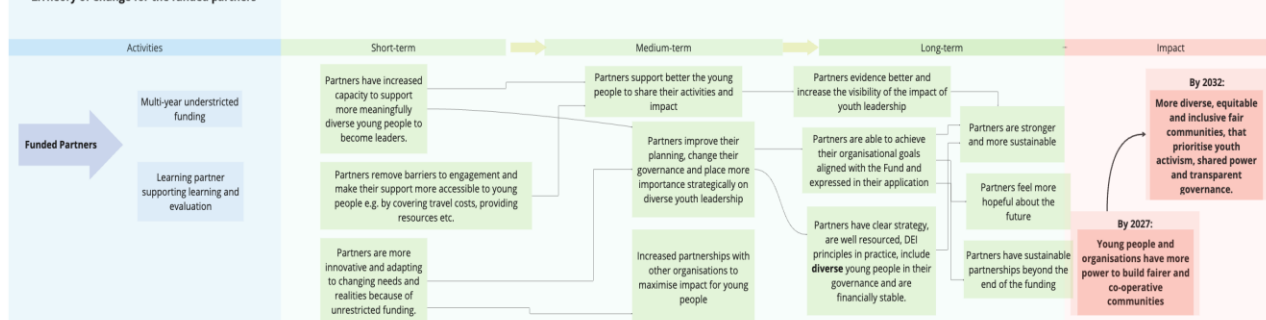
Appendix: Future Communities Fund-Theory of Change

Future Communities Fund - Theory of Change

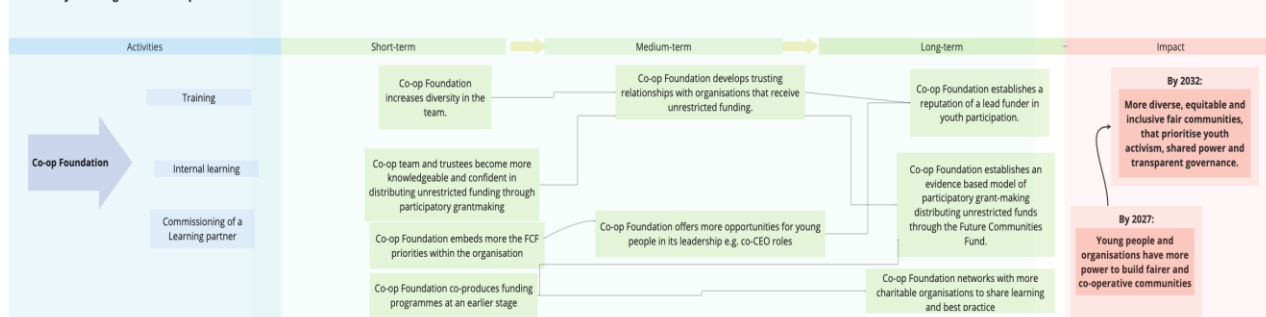
1. Theory of Change for the young people supported by the funded partners



2. Theory of Change for the funded partners



3. Theory of Change for the Co-op Foundation



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