



Foundation

Invitation to tender (ITT)

Research on grant-giving focus for the next round of our Future Communities Fund

- **Introduction**

This ITT is to commission research to support the [Co-op Foundation](#) in narrowing the focus of the Future Communities Fund Round 2 (FCF2) within the intersection of our three strategic priorities of safety, Diversity Equity and Inclusion (DEI) and youth activism. The [Future Communities Fund](#) is our first fund under our strategy [Building communities of the future together](#), launched in October 2022. Our strategic priorities are listed in our [vision](#).

We would like to ensure the focus of our fund is linked to an urgent issue within this intersection where we can make a meaningful impact through our approach to funding smaller-scale organisations (up to £250K annual income) with unrestricted long-term funding. We would also like to ensure this fund is distinct from other funds of the Foundation that are also in development stages.

The primary audience of this work is the Co-op Foundation team, board of trustees and other stakeholders involved in the development of FCF2, including the Future Communities Collective.

1. Background information

1.1 Who we are

The Co-op Foundation is 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. That's why we asked young people to shape our vision for fairer, more co-operative communities. They're the next generation of leaders and pioneers.

We make it easy for organisations and individuals to access our funds, work with us and campaign alongside us. We're always ready to share what we've learned and we're proud to be part of the Co-op.

Read more about us in our [2022 Learning & Impact Report](#).

Our strategy and principles of funding



We released our new [‘Building communities of the future together’](#) strategy in October 2022. Within this five-year strategy, we committed to:

- **Work** with 100 young people to create a clear, compelling and detailed vision of future communities in 10 years’ time that are fair and built on co-operative values. We undertook this work in May/June 2022 and young people directed us to fund and campaign on these [six strategic priorities](#).
- **Pioneer** a distinctly co-operative way of funding organisations and young people directly. We will provide flexible and unrestricted funds to people working to build the fairer, more co-operative communities of the future imagined by young people. We’ll bring people together to learn from and celebrate the progress being made in building future, fair communities.
- **Co-operate** with others from across the co-operative movement, social change and philanthropy sectors to bring our vision of future communities to life through funding and campaigning. We’ll advocate for our co-operative way of funding, and we’ll encourage other funders to join in.

Our strategy will run until 2027. This will allow us to measure our impact at the mid-way point of young people’s 10-year vision of fair and co-operative communities. Read more in our [Theory of Change](#).

We’ve also developed seven funding principles that will govern how we build funds, and award grants:

- **Participatory:** We will involve people from the communities we work with in decisions about how to use our funds. We’ll draw on the co-operative values of democracy, self-help and self-responsibility to help address the power imbalance present in traditional grant-making.
- **Unrestricted:** We invest in organisations that can bring our Future Communities Vision to life. We make unrestricted funding available, giving organisations the power to decide how best to use these funds to build their communities’ future.
- **Looking to the long-term:** Building the communities that young people want to be part of takes time, so we invest in organisations over longer timeframes. Long-term funding is a way we can demonstrate the co-operative value of solidarity with our partners and communities and help encourage social responsibility. Our funds may vary in the length of grants we make, but all would be designed to support long-term work to build communities of the future.
- **Trusting:** We focus on understanding partners and their work in a positive, transparent and trusting way. We are as flexible as possible with our funding, creating maximum freedom and control for our funded partners, so they can choose how best to ensure their community is ready for the future.
- **Accessible:** The size, background or leadership of an organisation should not be a barrier to accessing funding. We don’t exclude anyone based on how we ask them to apply for funding, how they report back to us or how they evaluate their work. We proactively encourage applications from small and traditionally less funded

groups, particularly those that face systemic barriers. We strive to enable organisations to access funding, for example, video applications via smartphones.

- **Supportive and strengthening:** In addition to funding, we provide partners with other kinds of support. We're developing a funder-plus model that provides partners with access to an enhanced range of support, such as organisational development opportunities.
- **Facilitate co-operation:** No person or organisation can build their community's future alone. Where we see opportunities for organisations and people to build together, we do what we can to foster co-operation. We actively support new partnerships, encouraging local connections and collaborations, and links between local and national organisations

1.2 About our Future Communities Fund

We launched the first fund - [Future Communities Fund](#) - from our 'Building communities of the future together' strategy in November 2023. This fund would offer unrestricted grants of up to £30k a year for five years - a potential total £1.5m investment for the Foundation.

We focused this first fund on the intersection of two of our strategic priorities - 'youth activism and shared power' and 'diversity, equity and inclusion' - and asked organisations with turnovers of under £250k to apply for funding to develop diverse young leaders.

We chose these strategic priorities for our first strategic fund due to the fact we had a long and successful history of youth funding alongside significant organisational knowledge of funding organisations that support young people. We also believe equity is the most appropriate starting point for any funding designed to build future fair communities. By combining our strategic priorities, we hoped to limit the number of applications.

Our fund was launched with an introductory webinar and two-stage application process. The application window was open for approximately one month, to 23 December 2022. We received more applications than we had hoped (660+ applications for 13 grants), which has prompted significant learning for the team on our future fund focus, application process and comms.

A diverse group of young people - our [Future Communities Collective](#) - were recruited to support our shortlisting and to take responsibility for making funding decisions alongside two of our young trustees. Read what they did here and who we funded in [this blog](#).

1.3 Future Communities Fund Round 2

We want to build round two of the Future Communities Fund (FCF2) based on our learnings from round 1. We are aiming to launch FCF2 in May 2024. This will be another £1.5m fund designed to provide long-term, unrestricted grants to community groups with turnovers of less than £250k per year. We will be involving our Future Communities Collective in the development and decision-making of FCF2.

We kicked off the development of FCF2 in May 2023 with initial research conducted by our team to help us decide which of our six strategic priorities we should focus on for the next round. The research involved consulting other sector bodies and organisations with expertise in funding. We also reviewed a sample of applications from FCF1 and did SWOT analysis of the potential strategic priorities under consideration.

We've since agreed our new fund should focus on our strategic priority of **safety** with intersections of **youth activism** and **DEI**. We feel this will allow us to address an issue that is underfunded and narrow our focus, while also giving us the opportunity to build on the expertise/learning gained in FCF1. A particular consideration that we are working with is that funding awarded through the Future Communities Fund is **unrestricted**, meaning that we are looking for fund whole organisations whose missions align with the three strategic priorities for this fund, rather than specific projects.

Aim and objective of the research and research questions

The aim of this research is to support the Co-op Foundation in narrowing the focus of the Future Communities Fund Round 2 within the intersection of our three strategic priorities of safety, DEI and youth activism. We would like to ensure the focus of the fund is linked to an issue that is urgent to be solved, and where we can make a meaningful impact through our approach to funding smaller-scale organisations (up to £250K annual income) with unrestricted long-term funding.

Safety as a theme will be at the core of FCF Round 2 through a stated ambition to support organisations that 'enable us to all feel safe and respected in our communities'.

Objectives:

- To define more clearly the focus (aim and objectives) of the Future Communities Fund Round 2
- To identify organisations, networks and examples of good practice related to the focus of the Future Communities Fund Round 2, including learning from the [Peer Action Collective](#) (matched funded programme with contribution from the Co-op Group)
- To identify broad parameters to support the development of eligibility criteria for the Future Communities Fund Round 2
- To identify other funders and networks that operate in the area of focus of the FCF2

Research questions

- What could be the FCF2 focus (aims and objectives) within the intersections of our strategic priorities of safety, youth activism and DEI
- What does good practice look like related to the focus of FCF Round 2?
- What organisations already operate, and are examples of good practice, related to the focus area of the FCF2?
- What is the profile of organisations that work in the area of focus of FCF2?
- What opportunities and challenges do these organisations face?



- What networks and wider relationships do these organisations hold?
- What is the most relevant way to define 'safety' for the FCF2?
- How can we make a meaningful difference for the organisations that we will fund with the amount and type of funding we have available?
- What could be key considerations for our funding criteria at the application stage to ensure we reach out to the relevant organisations?
- Which networks and experts exist that the Co-op Foundation can connect with to improve our knowledge and ongoing learning?
- Which funders are already working in these areas? We may be interested in future match funding partnerships to boost our reach and impact.
- How can people most affected by the issues we want to address be part of the fund we create?

2. Scope of Requirements

We are open for the suppliers to suggest appropriate methodology for conducting this research to fulfil the aim and objectives and answer the research questions appropriately. We are open to creative and innovative methods to be applied in this work.

We expect a combination of primary and secondary data collection and analysis e.g. analysis of online resources/websites/reports/academic papers and consultation with relevant stakeholders (e.g. through a survey or interviews etc.).

Relevant stakeholders could include experts in the areas of interest, charities, and young people with relevant lived experience. The Co-op Foundation team can help with accessing some of the stakeholder groups and individuals., including young people.

The choice of methodology and level of depth of the research is expected to be influenced by the available budget and timeline.

3.1. Other requirements

We expect the study to be delivered in collaboration with the Co-op Foundation. We are looking for a researcher/consultancy who has the following:

- Good understanding of the issues around safety, youth activism and DEI
- An understanding of funding practices, grant-making including unrestricted and participatory grantmaking
- Expertise in research e.g. horizon scanning, scoping studies, landscape analysis
- Excellent facilitation skills

We also expect the supplier's team to be diverse in membership and inclusive in practice.

4. Deliverables

We expect the following deliverables:

Deliverable	Deadline
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20 pages publishable report including executive summary. The report (language and design) needs to be relevant to and engaging for the target audiences of this research: the Co-op Foundation team and Board of trustees and other stakeholders that will be involved in the development of the FCF Round 2 including young people involved in the development of the fund.	15 December
Raw data	15 December
Presentation of the findings to the foundation team and other stakeholders who will be involved in the development of the FCF2	January 2024

The final research report deliverable needs to answer our key questions listed above (see section 1.3). This could be done through a range of visual outputs and written outputs - detailing the findings, strategic recommendations, methodology and any raw data alongside a virtual or in-person presentation for the Co-op Foundation team and other stakeholders involved in the development of the fund.

5. Budget

The budget available for the work, including all expenses and VAT, is £10k. Any costs to support participation in the research, for example, participant expenses, incentives or meeting room costs should be included and clearly specified within the budget. 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 VAT where this applies.

6. Ethics

We expect the research to adhere to the Social Research Association (SRA) [research ethics guidance](#) and the British Education Research Association (BERA)'s [Ethical Guidelines](#). We would also need to view safeguarding documents, specifically related to planned interviews with young people.

7. Diversity, Equity and Inclusion

Diversity, Equity and Inclusion (DEI) is one of 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

ITT Timetable

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Foundation

1	ITT issue to Suppliers	Co-op Foundation	w/c 11 Sept
2	Submission of Supplier Q&A to Co-op Foundation Contact	Supplier	27 Sept
3	Return of Supplier Q&A to Suppliers	Co-op Foundation	29 Sept
4	Submission of research proposals	Supplier	5pm 9th Oct
5	ITT Evaluation Period	Co-op Foundation/ Co-op	w/c 9 Oct
6	Clarification meetings may be held with shortlisted consultants	Co-op Foundation/ Co-op	w/c 16 and w/c 23 Oct
7	Notification of Contract Award	Co-op Foundation/ Co-op	w/c 23 Oct
8	Contract Start Date	Co-op Foundation/ Co-op	w/c 23 Oct

9. Response submission and format

Please submit your proposal by 9th October 2023 through an email to Co-op Foundation's Funding and Partnerships Manager, Ella Smyth: ella.smyth@coop.co.uk

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

1. Description of your understanding of the project's purpose and context.
2. Explanation of how your work and output format will fulfil the aim and answer the research questions of this study and complete the deliverables as they are described in the ITT.
3. Detailed methodology for undertaking the study, appropriate to answer the research questions.
4. Description of anticipated risks and challenges and ways to mitigate them and quality assurance for your work.
5. Details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects. 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 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 straight away.



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 6 pages**. Submitting a proposal more than six pages will automatically result in the rejection of the proposal.

We recognise 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 will want one of these individuals or organisations to be identified as the lead contact.

10. 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: 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.

11. Supplier Q&A

Prior to the submission of your ITT response, suppliers are provided with the opportunity to submit any questions they have about the work and the requirements. All questions are to be submitted to the Co-op Foundation by e-mail to Funding and Partnerships Manager, Ella Smyth: ella.smyth@coop.co.uk in accordance with the ITT timetable.

12. Scoring

Your proposal will be scored out of 100%. 90% of the marks will be awarded to quality, and 10% of the marks will be awarded to 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, key questions, and main issues related to this study?	Weighting 10%
2. To what extent is the proposed methodology robust and appropriate to fulfil the aim of this work and answer the key questions?	Weighting 20%
3. To what extent does the ITT response demonstrate the supplier has research expertise in the areas of just transition and youth involvement in policymaking, and expertise in evidence reviews?	Weighting 20%
4. To what extent does the ITT response demonstrate the supplier has facilitation skills and expertise in engaging young people in dialogue through deliberation methods and/or social science research methods?	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, inclusive in membership team with clear roles and responsibilities?	Weighting 20%
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The evaluation of price will be carried out on the schedule of charges you provide in response to Table A.

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 should 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]					