This sample brief is just a guide and should be tailored to meet your organisation’s needs. Do let us know if you think it could be improved!

If you would like Esmée Fairbairn Foundation to share a tender for Funding Plus support on our [website](https://esmeefairbairn.org.uk/about-esmee/current-vacancies-and-opportunities/), please email shemain@esmeefairbairn.org.uk

**Please note that it isn’t necessary to go out to tender for Funding Plus support and you don’t need to tell us about your procurement process.**

Title of research project/evaluation – Organisation Name

Invitation to Tender – by [add deadline for submissions]

1. **About [add Organisation name]**
2. **Project background/context**
* What is the background to this commission?
* What work has [add organisation name] done in this area that is relevant? How does this work relate to your strategy, services, or projects?
* Which partners are you working with?

**3. Evaluation/research/project objectives**

* Explain why the evaluation/research/consultancy support is needed
* Set out objectives for the evaluation/research/consultancy – what do you want it to achieve? How do you plan to use the findings?

E.g. To:

* collect data
* develop new work
* change practice
* What are the key questions the evaluation/research/consultancy needs to answer?
* Include any key themes or strategic priorities the evaluation/research/consultancy should focus on, and any important definitions to should tell providers about – such as outcome indicators
* Who is the main audience? List audience by priority [Be realistic!!!] E.g.:
* Your organisation
* Your participants/beneficaries
* The wider sector
* Policy makers/commissioners
* Other civil society organisations
1. **Method and approach**

Provide detail if a specific/preferred method is required - interviews, surveys, literature reviews, comparator analysis, workshops etc. If you aren’t sure, ask the provider to suggest an approach.

E.g.

This evaluation is a piece of action research and we expect that the evaluator will work in a developmental and flexible way, with a programme of reporting to be agreed with [organisation], but with the acceptance that future findings may mean a change of direction.

The Evaluator will:

* Meet with the [organisation], to agree a format for evaluation
* Attend meetings of the “sharing and learning network” as agreed
* Meet with a sample of participants per year
* Gather data from participants on progress remotely
* Provide a progress report in writing to [organisation], every 6 months, and raise any major issues of concern that arise in between reports
* Produce a final summary internal report for [audience], along with a final report suitable for publication
1. **Outputs and deliverables**

List the key outputs or materials needed from the evaluation/research/consultancy such as:

* The final report and any interim reports
* Recommendations (if desired)
* Any datasets
* A presentation
* Any summaries or case studies that will help you use and share the findings.
* If there are options or you want the consultant to make suggestions on how to present the findings then include this e.g. “We welcome suggestions for how the findings could, additionally, be presented in more creative formats to make these more accessible or engaging.
1. **Experience**

E.g.

The provider is expected to have:

* Skills / Knowledge in [relevant subject area]
* Skills / Experience in working with key stakeholders e.g. Trustees, X organisations; the Youth Sector
* Relevant and demonstrable experience of methodologies e.g. devising and delivering quantitative/qualitative research/ evaluation/ focus groups.
* Strong communication skills, including listening and questioning, and the ability to communicate information to a non-technical audience, both verbally and in writing.
* Analytical and interpretation skills.
* Strong inter-personal skills.
* Strong skills in project and risk management
* Creativity and flexibility to respond to issues quickly and adjust the approach to or style of delivery
* Commitment to our values and taking an ethical / values based approach to research
* Commitment to a x year piece of work.
* We are open to proposals from consortia of organisations or individual consultants, where there are appropriate measures in place to ensure clear lines of management and communication. Payment arrangements will be via a single organisation or consultant, usually with the bid leader.
1. **Timescale for the work**

E.g.

The Programme begins in x and will run for x months/years. We expect the evaluator to become involved as soon as possible after the Programme begins, with a final report due following the Programme’s conclusion in x.

Or

* Agree and sign off brief with consultant/s – date
* Field work/research – date
* Receive draft report – date
* Final report to Trustee Board – date
1. **Budget**
* What is your budget for the evaluation/research? State whether it includes expenses and VAT.
* State whether particular costs are included or excluded e.g. costs for proof-reading, design etc of outputs; research incentives will be met by [organisation]

E.g.

There is a total budget for the project of £x over x weeks/months. Proposals should be budgeted to fall within this range. This fee includes any charge for VAT and/or tax liabilities of the consultant. Any additional costs (including any additional expenses) must be agreed with the [organisation] in writing before they are incurred.

1. **Your involvement**

Outline your approach to:

* Managing the contract e.g. point of contract
* Meetings e.g. frequency and duration
* Confidentiality e.g. sharing our data
* Intellectual property
1. **To apply**

If you are interested in tendering for this project, please email your proposal to [named contact email] by [date]. This should contain:

* Background information on your experience of x and y clearly demonstrating your experience and credibility within the sector/**\***examples of previous similar work
* A CV of key personnel involved in the project including a list of relevant projects previously/currently working on.
* A summary of how the work would be carried out including:
* Budget broken down by item to include: number of days work, daily rate of pay (for each team member), and VAT where applicable
* Confirmation of who would do each aspect of the work
* Timescale.
* Outline of constraints, challenges and risks associated with the work and how the provider would mitigate them
* Provider commitments to DEI and staff demographics
* Safeguarding policy and active procedures (if relevant to tender)
* Contact details for two relevant referees we can talk to now

**\*** To ensure an inclusive approach to commissioning, it may be more equitable to ask for less written information at proposal stage and to instead ask questions in a shortlisting phone call or at interview stage

**The total maximum length of submission should not exceed x A4 pages.** You may append the following outside of the page limit:

E.g.

* A full example of a previous project
* CVs for the consultants
* Safeguarding policy
1. **Proposal assessment process**
* Say how you will assess submissions to choose the successful provider e.g. scoring each bid against criteria set out in the brief
* You will usually be looking for a balance between the quality and cost of proposals.
* Will there be an interview stage? Provide dates and format.

E.g.

Your proposal will be reviewed by [named lead]. x% of score will be weighted to skills and experience and x% to cost.

We will meet with preferred candidates in order to discuss how they might approach and carry out the work.

1. **Commissioning Timetable**

E.g.

|  |  |
| --- | --- |
| **Date** | **Stage** |
|  | Brief issued |
|  | Deadline for clarification questions |
|  | Deadline for tender submissions |
|  | Shortlisted providers notified |
|  | Interviews |
|  | Appointment date |
|  | Inception meeting |

1. **Contact**

Provide details of who bidders can contact with queries about the brief. It should be the staff member responsible for managing the contract.

* Name:
* Job title:
* Email address:

**Appendices**

* Include any other useful but non-essential information in the appendix e.g. hyperlinks, embedded documents, websites