

## Tender brief



## Learning partner for 2024-28 Economic systems change



Deadline for response: 21 June 2024

Budget: in the region of £80-90,000 over 3.5 years



## Purpose of the brief

Friends Provident Foundation is looking to engage a learning partner to support us to reflect on our work and its impact and to enable us to learn and adapt in an iterative way.

We are aiming to develop an embedded evaluation approach which we believe will better suit the longer-term systemic change programme that we undertake than a standard evaluation model. This requires a partner to walk and learn alongside us during the course of our next strategic period to fully absorb the nuances and complexities of the work and how it can be effectively assessed, as well as pulling together those insights and reflections at the end of the 3-year period.

Our work aims to seek out and support activities and ideas pushing for changes in our economic system to make it fair and sustainable. We do this through grants and social investments. At the same time our own activities aim to raise standards and challenge behaviours from within the system itself, recognising the role we play as an asset holder. We do this through our communications, partnerships and investment engagement activity. By systemic change we mean work pushing at how structures operate, behaviours of key economic players, challenges to how the economy is thought and spoken about. We do not prioritise work to alleviate more immediate problems caused by the economic system.

For more information on our work please visit [our website](#)

## Required outputs

Our learning work is evolving and we are primarily looking for the right partner to guide and assist us on this journey. The core of our work is an ambition for economic systems change which is a long-term, multifaceted and complex aim. We recognise that this is difficult to track and measure in any standard way, and are seeking instead to learn more about what creates the conditions for longer-term change to happen and how we can best deploy the various tools and approaches at our disposal to help achieve the change we want to see.

There are also some specific outputs that are planned for this role:

- Developing a shared understanding amongst Foundation staff and trustees about what we can realistically demonstrate and how we can measure and track change within our work
- Assisting Foundation staff in the development of an organisation-wide learning framework including the development of appropriate measures and consideration of a dashboard/presentation methods
- Support with data collection to answer learning questions

- Co-creating learning spaces/exchanges for staff, trustees and grantholders
- Be the main learning point for one strand of grant funding in particular, 'Shifting cultural perceptions of the economy'. This action research strand will have an open call for proposals at the outset and will then work with a small group of 5-6 awarded grantholders for 3 years with a central theme/question in mind for learning purposes. This strand of grant funding has a value of around £350,000 per annum.

## Background and context

Friends Provident Foundation is an independent endowed charity with a vision of a fairer economy and a better society. We work towards this through grants, social investments, mainstream investments and building networks and communications. We take an integrated approach to our mission and capital base and alongside grant making use our endowment as a tool for change, including through social investments and shareholder engagement.

In the autumn of 2024 we will be launching a new grants programme for the period 2024-2027, with a focus on three strands of funding within our wider mission: shifting cultural perceptions of the economy; transforming financial systems; and, supporting new economy infrastructure. The learning partner role will be particularly engaged with the learning needs of the grants programme, but will also provide support for learning from our social investments and investment engagement work as well as with the development of an overall learning framework for the Foundation.

## Roles and responsibilities

The Foundation operates from its office in York, led by the Foundation Director with a staff of eight. Governance is through the Foundation's board of trustees to which the staff report. The learning partner will work closely with the Grants and Learning Manager in particular to deliver this work. The learning partner could be an individual or an organisation.

## Selection process

Written responses to this brief will be assessed against the following criteria:

- Response to the specific requirements of the brief
  - Quality of the proposal
  - Methods proposed
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- Experience of similar work, in particular there is a strong interest in experience of evaluating and tracking systems change initiatives
- Experience of working with other charities/foundations

Suppliers to the Foundation should include consideration of whether they are Living Wage employers, by the criteria of the Living Wage Foundation.

In making this tender appointment the Foundation may positively seek out organisations with a social purpose, and be mindful of local economies. We will also seek to ensure that any services provided are undertaken by organisations whose other business practices are consistent with the principles of our investment policy in terms of negative and positive screens.

Shortlisted agencies will be invited to discuss their proposals with staff, either in person or online, on a date to be confirmed.

## Budget

The learning partnership is expected to continue for around 3.5 years, commencing in September 2024 and concluding around February 2028. The guide price for this contract is £80-90,000 in total. Applicants are asked to submit a detailed budget for the work, including a breakdown of fees and allocation of time. Quotations should be inclusive of VAT and all expenses.

## How to apply

To apply please send a proposal for the work that is relevant to the brief by 5pm on Friday 21 June to Jo Wilce, Grants and Learning Manager at [enquiries@friendsprovidentfoundation.org.uk](mailto:enquiries@friendsprovidentfoundation.org.uk). We will acknowledge receipt of your application.

If you would like an informal discussion about the work, please contact Jo Wilce on [joanne.wilce@friendsprovidentfoundation.org.uk](mailto:joanne.wilce@friendsprovidentfoundation.org.uk). References will be requested and taken up for any shortlisted applicants, prior to appointment.

## Timetable

**Issue of tender:** Friday 24 May 2024

**Close of tender:** Friday 21 June, 5pm

**Discussions:** late June/early July

**Appointment:** mid-July, with introductions and scene setting before end of July, work expected to commence in September 2024.

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# Privacy Notice

## What we collect and why

When you submit a tender bid to us you may be providing personal data about yourself, through which you can be identified. We have written this notice to let you know how we will handle and protect your information.

Information which may be collected during a tender process, may include:

- Name
- Contact information including email address, postal address, and phone number
- Your work, education, and training history
- Contact information for your referees
- Any other personal information which you choose to give us relating to your application
- Notes made by the selection panel during the commissioning process

We require this information to review your submission, undertake, and support the tender process, and communicate to you the decisions and outcomes of that process.

The Data Protection Act (2018) sets out that we are required to have a lawful basis for processing your data. In this instance we are processing your data under 'legitimate interests' specifically to support our tender selection process, as outlined above.

We store this information on our office IT systems, including cloud-based directories and email system, and in paper-based files. We retain information for unsuccessful bids for a period of 6 months following the completion of the selection process, to enable us to provide feedback and address any other queries. After a period of 6 months we will delete your data.

For any concerns you have about our use of data, please contact:

[enquiries@friendsprovidentfoundation.org.uk](mailto:enquiries@friendsprovidentfoundation.org.uk) or on 01904 629675.

You can also contact the Data Protection Regulator, the Information Commissioner's Office (ICO): <https://ico.org.uk/global/contact-us/>

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