



The Volant Charitable Trust 2008 -2021

EVALUATION BRIEF

CONTEXT

Since 2008 Foundation Scotland has been appointed by The Volant Charitable Trust to deliver a funding programme that makes multi-year awards (for up to three years). Initially, the awards were for £10,000 or less/year to charities and community groups in Scotland. In September 2018, the Trustees increased the value of the awards to £15,000 per annum, effective from 2019.

Currently, the Trust commits £720,000 per annum for grantmaking. There are two Trustee meetings per year, in March and September, with a budget of £360,000 set for each meeting. To date, the Trust has awarded 239 grants totalling £6,353,691. A full list of all the awards is available in appendix 1.

Foundation Scotland has previously also managed a small grant programme for The Volant Charitable Trust, but this closed in 2012

1. Introduction and Background

The Volant Charitable Trust was established in 2000 as a grantmaking trust to alleviate social deprivation, with a particular emphasis on supporting women, children, and young people at risk. Foundation Scotland supports the open grantmaking element of the Trust's work in Scotland. However, the Trust is also committed to other work, including international projects, the support of single parents through Gingerbread and more recently, charities assisting those impacted by the Covid-19 pandemic both in the UK and Internationally.

The fund's primary focus is to support women, children and young people who are at risk and facing social deprivation. Projects must demonstrate a strong focus on supporting women affected by hardship or disadvantage and tackling the issues they face to make a lasting difference in their lives and life chances.

Priority is given to projects that tackle serious issues and help people turn their lives around. The three programme areas that the Trust will support are:

Women: Victims of sexual abuse, rape, domestic violence, and those working in the sex industry; care for young mothers and those affected by postnatal depression, isolated and lone parents; community support for black and minority ethnic women and asylum seekers; support services for women prisoners and their families.

Children and young people: Counselling, support services and outreach projects for those who are disadvantaged or deemed to be at risk through neglect, emotional and physical abuse, alcohol, or drug misuse.

Poverty and Deprivation: Mental health projects for women and children; support for vulnerable families; promotion of healthy eating for families in areas of extreme deprivation.

3. Aims of the Evaluation

This evaluation is required to help understand the impact of the grants on the organisations funded and, more importantly, the beneficiaries they support.

The final report should evaluate the impact and outcomes of grants on:

- The organisations to which the grants were made
- The beneficiaries of the projects - the Trust is very keen to learn the human impact stories from their funding
- If appropriate, the wider community

Project completion dates are between 2009 and 2021, and all grant recipients have now submitted the end of grant reports. Therefore, the evaluation should identify the immediate benefits of the project and the extent to which these translated into long-term, sustainable outcomes.

The report should also pull together the collective impact data that has been gathered.

Foundation Scotland uses an impact framework of predetermined outcomes and indicators that funded organisations from March 2018 have been asked to report on. In addition to this quantitative data, the reports submitted provide a narrative on the changes to the organisation, lessons learned, and a case study to illustrate the change to beneficiaries.

We are also assessing the effectiveness and improvement of grant applicants' processes and so would want the evaluator to include questions on this in any interviews or surveys.

4. Considerations

Organisational Impact

Questions about the organisational impact of the grant will vary across grant recipients but the evaluation should consider:

- the extent to which the grant enabled organisations to further develop the project for which they received funding
- the long-term sustainability of the organisation
- whether the grant related to a new area of work for the organisation and, if so, if this type of work has continued
- if the grant was for a new organisation, how important was this to the organisation's continued development and existence

Impact on Beneficiaries

The evaluation should also consider the different types of beneficiaries. Some projects aimed at a specific group of beneficiaries, whereas others targeted a broader range, e.g., young people in the community. In addition, some projects worked continuously with a select group, whereas others had different attendees at each session. The evaluation should therefore consider:

- whether some beneficiaries were more likely to show positive outcomes from a project than others
- has the fund identified and supported innovative/novel approaches of supporting their beneficiaries
- whether some outcomes were more likely to be achieved than others
- whether any factors make it more or less likely a project will impact a larger percentage of participants
- where the same types of organisations have been funded, e.g., Rape Crisis, are there any who showed more success than others and could be seen as examples of good practice to be shared with others.

Contractors should not feel bound by this particular typology, nor by the examples given.

Other Considerations

Additional consideration should also be given to:

- Whether projects had an effect on the wider local community, and if so, how.
- Whether the Volant grant fully funded a project or was part of a larger funding package. Did this have any effect on the impact of the Volant grant?

5. Methodology

Contractors are invited to outline their methodology. This might include desk-based research, surveys/questionnaires and interviews with both staff and project participants. It is anticipated it will include a mixture of qualitative and quantitative analysis.

The contractor will be given access to documentation related to the Volant Trust grantmaking, including applications, assessments, project progress and final monitoring reports and impact framework data (where applicable). It is expected the contractor will deal directly with organisations and participants, and the bid should state what type of sampling will be used.

6. Conclusions and Recommendations

The contractor will be expected to outline the key features of the impact the funding has had and that the Volant Trust will be able to use when considering its future priorities. Conclusions should:

- Identify the nature of the outcomes achieved as a result of the funding and if any of these were likely to be sustained in the long term.
- Under the three programme areas, outline any features of projects or organisations that are more or less likely to lead to a long-term and sustainable beneficial outcome for organisations, project participants or communities.
- Include consideration of the Volant Trusts' three priority areas and identify if there are specific issues for projects falling within any of the categories.

- Discuss any findings in relation to the duration of 3-year funding, note any difference in impact relating to awards for start-up funding, awards where Volant Trust was the only funder or awards which were part of a larger funding package.
- identify and provide at least eight beneficiary case studies that powerfully illustrate the impact of the funding
- The researcher may additionally wish to include discussion of other conclusions. These can be identified in the bid, if known or added as the work progresses.

7. Reporting

A draft report should be submitted and revised following feedback from Foundation Scotland. A presentation on the evaluation is expected within two weeks of the final submission. This should include an executive summary and a one-page infographic. This should be standalone from the main report for dissemination to stakeholders. Two hard copies of the final report should be delivered and an electronic copy.

The timetable for this will be agreed upon between all parties.

8. Proposal Format

Due to the sensitive issues some of the funded organisations' address, we will prioritise a female-led evaluation. It is expected that potential contractors will demonstrate an understanding of evaluation principles and experience of working with community-based programmes.

Potential contractors should evidence an awareness of the sensitivity of the challenges faced by project participants, in particular by women who have experienced male physical or sexual violence. They should demonstrate an ability to converse with victims of male violence in ways that do not cause additional trauma or distress.

The proposal should include:

- Detailed timetable and methodology – including the number of days allocated to each part of the evaluation.
- The proposal should indicate phasing of staged payments appropriate to how the work schedule is presented in the proposal.
- Copy of organisation's policy on equality and diversity.
- Details of any similar work undertaken by the contractor. As part of the assessment of the bid Foundation Scotland might seek evidence of this work, such as published reports.
- Composition of the individuals/team members working on the project and the role and experience of each member.
- If applicable the company registration number and the VAT registration number.
- The names of two referees, ideally within the voluntary sector, who can provide a reference about the satisfactory completion of relevant work.
- A statement about data protection (see section 11)
- A statement setting out the quality management procedures to be put in place to achieve the review objectives.

9. Budget

Concerning the budget, tenders will be welcomed within the region of £12,000 - £18,000 inclusive of VAT.

Your proposal must be marked '**EVALUATION PROPOSAL - Private & Confidential**' for the attention of Jennifer McPhail, Fund Advisor – jennifer@foundationscotland.org.uk

Proposals should be in the form an electronic copy to arrive no later than **11.00 am on 21st April 2022**. Any queries in respect of this brief should be addressed to Jennifer McPhail.

10. Timetable

The consultancy will follow the timescale outlined below:

- Deadline for return of tender –21st April 2021
- Interviews with shortlisted consultants (this will involve a presentation) – w/c 2nd May 2022
- Consultant appointed – **w/c 9th May 2022**
- Initial meeting with consultant –**16th May 2022**
- Progress meeting - w/c **11th July 2022**
- Draft report and preliminary findings – to be agreed between Foundation Scotland and the successful contractor
- Final report - **31st August 2022**.

11. Data Protection Matters

The review could include direct or inadvertent discovery of personal information protected by the Data Protection Act 2018. Foundation Scotland is relying upon the contractor to bring all necessary knowledge and expertise to this task in respect of ensuring that the requirements of the Data Protection Act 2018 are met.

The submissions should clearly state in unambiguous terms that the contractor shall make appropriate provision for meeting indemnities to Foundation Scotland for any breach by the "data processor" and his/her staff. The appointed consultant will be required to provide evidence of current professional indemnity cover together with contact details of the underwriter in the event that Foundation Scotland wishes to check the extent of this cover, exemptions, exceptions, and policy excesses.

12. Quality Control and Accuracy

As outlined in Article 8, the submission should include an unambiguous statement setting out the quality management procedures to be put in place to achieve the review objectives.

13. Copyright

The copyright and any other intellectual property on the materials provided by Foundation Scotland, or produced on their behalf, including both the final report and any earlier drafts, shall vest with Foundation Scotland.

The Consultant shall not be permitted to make use of the materials referred to for any other purpose without prior written approval from Foundation Scotland. All materials received and software files created during the course of this project should be returned to Foundation Scotland at the conclusion of the project in an agreed format.

14. Confidentiality

The Consultant shall keep confidential and shall not disclose to any third party any information gathered during the course of working on the Evaluation and shall ensure their staff fully understand the on-going nature of their obligations under the Data Protection Act 2018 as "recipients" of personal data, both during their employment with the firm and upon changing employment at a later date.

15. Right to Termination

Foundation Scotland reserve the right to terminate the contract (giving one week's notice in writing) should they feel the project is not progressing to their satisfaction.

16. Invoicing Arrangements

As outlined in Article 8, the bid submission should indicate the phasing of staged payments appropriate to the work schedule presented in the bid proposal. Details of what has been agreed will be confirmed in the letter of appointment.