

INVITATION TO TENDER & TERMS OF REFERENCE

EVALUATION OF THE VATTENFALL UNLOCK OUR FUTURE FUND

CLOSING DATE FOR TENDERS: 5th December 2023

1 Introduction

The European Offshore Wind Deployment Centre is owned and operated by Aberdeen Offshore Wind Farm Limited, a subsidiary of Vattenfall, which has committed to a fund benefiting the communities of Aberdeenshire and the City of Aberdeen.

The Unlock our Future Fund (UOFF) supports charitable activity that addresses the following priorities:

- Contribute to a climate smarter world with sustainability at its core.
- Invest in community facilities and activities that are fit for the future and are environmentally sustainable, especially community spaces and transport.
- Support creative solutions.
- Ensure a legacy (lasting impact) which brings clear benefit to the local community.

The Unlock our Future Fund provides £150,000 per annum (as at Year 1 – 2019), increasing with inflation (as measured by the Retail Price Index), for the life of the wind farm, which is expected to be at least 20 years.

UOFF is administered by Foundation Scotland, an independent grant-making charity.

For further information: <https://www.foundationscotland.org.uk/apply-for-funding/funding-available/unlock-our-future>

2 Purpose & Scope

Foundation Scotland now seeks to commission a consultant to evaluate the Fund in keeping with guidance set out in the revised (2019) Scottish Government Good Practice Principles for Community Benefits from Onshore Renewable Energy Developments (GPP). For further information: <https://www.gov.scot/publications/scottish-government-good-practice-principles-community-benefits-onshore-renewable-energy-developments/>

The evaluation is an opportunity to assess the overall functioning and effectiveness of arrangements for distribution of the fund in its first five years, and to assess the impact of the funding to date. It is also an opportunity to build interest in and engagement with the Fund, and to ensure that it is meeting the current needs and future aspirations of the communities it serves.

The overall purpose of the Review is to assess and learn about what the fund is achieving in the communities it serves and how it can become even more effective over the next five years.

The objectives of the Review are to:

- Review the value and impact of projects funded to date in terms of climate and community benefits.
- Ascertain if the Fund's priorities are still in line with priorities of the communities and stakeholders in the area of benefit – and recommend any changes if they are found to be inadequate.
- Assess the effectiveness of delivery arrangements and, if these are still fit for purpose, make recommendations for improvements where possible.
- Assess the likelihood of the fund achieving a lasting legacy for the area and what changes might be required to better enable this.

Findings and recommendations will inform further development of the UOFF.

The appointee will consult with relevant stakeholders on Fund arrangements (criteria, application process, support, etc), the difference the Fund is making, and how the Fund might develop to become an even more effective resource for communities. To achieve this the consultant will:

- Review UOFF core documents and material related to its grant-making work to date.
- Develop and widely distribute a stakeholder survey.
- Provide a richer source of data to help interpret the survey findings by, for example considering random sampling (10-15 stakeholders), stratified across a range of geography and organisation size, for more detailed telephone interviews.
- Meet with fund decision makers (collectively) to hear their experiences and views.
- Produce an evaluation report with findings and recommendations and a stand-alone executive summary.
- Write (eight) detailed testimonials of organisations, projects and communities of place or interest supported by the UOFF and drawing out insight and learning in relation to the Fund's current priorities and community action.
- Compile a presentation pack, produced alongside the report, which summarises the key messages and findings from the evaluation which can be shared with stakeholders.
- Run a session with selected stakeholders to present the report findings, adjust in accordance with feedback and finalise the main report and summary report.

- Liaise closely throughout the evaluation term with Foundation Scotland, providing regular updates and operating flexibly to ensure the objectives of the evaluation are met.

In ascertaining the value and impact of UOFF funding into the area, the evaluation will refer to relevant regional policy and provide a picture of challenges and opportunities facing the area, and other sources of support and funding available to and accessed by local groups.

We expect the evaluation to offer opportunities for community groups (applicants/grantees) and other stakeholders, as well as fund decision makers, to share ideas and opinions on the distribution and impact of the Fund.

We require an approach that is dispassionate, objective and considered, preferably grounded in a demonstrable understanding of support for community led climate projects in Scotland.

3 Budget

The cost of your proposal will be up to £19,000, inclusive of VAT if applicable, and any expenses, and should be broken down to reflect the different components of the scope described above.

4 Timescale

It is proposed that the work takes place over approximately 4 months (December 23 – April 2024). The following is provided as a guide. However, a final project plan will be agreed with the successful bidder. Please include in your proposal the timescales you anticipate working to for each of these project milestones.

Tender circulated to prospective consultants	14 November
Closing date for proposals	5 December
Virtual Interviews	11/12 December
Contract issued	15 December
Draft report submitted	31 March 2024
Presentation and feedback	Early April tbc
Comments and revisions incorporated	Mid-April tbc
Final report signed off	30 April 2024

We would also expect to agree a schedule of reporting by the selected consultancy during the Review process to provide updates on work completed and address any issues arising and/or reflect on emerging findings, making adjustments as necessary to the work-plan.

5 Guidance on tender submissions

Submissions should include an outline of your proposed methodology and approach, proposed timescales, a short CV for each member of the project team, and detailed costings for undertaking the work. Please also include references from two clients you have worked with within the last year. Ideally at least one will evidence work you have undertaken in a specific geographical community and where the context of climate action was significant.

Tenders will be assessed against the following criteria:

Skills and experience

- Evidence of evaluation activity of funding programmes, including some place-based funds.
- Good working knowledge of the range and scale of climate action within Scotland's community sector.
- Good interpersonal, facilitation and engagement skills.
- Good writing and analytical skills, with an accessible style of communication.

If a team will undertake the work, please outline the relevant skills of each member of the project team and which tasks they will be carrying out.

Methodology

- Detail about how the scope of work will be delivered, clearly broken down by project tasks.
- Set out a project timetable demonstrating when the work will be phased.

Price

- Detailed costing for all activities in the scope of works including day rates for those involved and number of days the tender is based on.
- Value for money.

6 Submission of Responses

Responses to this brief should be emailed to rachel@foundationscotland.org.uk by 5pm on 5th December 2023, with the subject heading 'Response to UOFF ITT'. Receipt of submissions will be acknowledged. If you wish to discuss this opportunity before tendering, please contact marion@foundationscotland.org.uk