



THE
MERCERS'
COMPANY

Request for proposals (RFP): Evaluation and learning from the Mercers' Company Older People & Housing and Church & Communities Programmes

You and others are invited by The Mercers' Company to submit a proposal for the above referenced contract. Details of the requirements are set out in this RFP.

The deadline for submitting a proposal is **12.00 (Noon) on Friday September 15th 2023**. Submissions should be sent to grants@mercercs.co.uk by this deadline.

If you have any queries about this contract or the tender process, or if you would like to speak to us about it, please email grants@mercercs.co.uk.

Best wishes

Ann Wynne and Matt Roche

Grants Programme Managers

(Older People & Housing and Church & Communities Programmes)

The Mercers' Company

Background

The Mercers' Company is a livery company focused on being a philanthropic force for good. Our giving is focused on [Young People & Education](#), [Older People & Housing](#) and [Church & Communities](#). This allows us to create positive change across generations, giving those we help the chance to live a fulfilling life now and in the future.

The Company's Older People & Housing programme supports charitable organisations that tackle loneliness and poverty.

The Company's Church & Communities programme supports churches, as well as other faith and secular community-based organisations, to enable Stronger Communities and Better Outcomes for Families.

Both programmes provide grants to charitable organisations in London and Norfolk, with the Church & Communities programme also supporting organisations in Lincolnshire and the North East.

These grants are funded by the Mercers' Charitable Foundation, the Charity of Sir Richard Whittington and the Earl of Northampton's Charity; three charities of which The Mercers' Company is corporate trustee. There are currently approximately 265 active grants.

Over the last five years, Church & Communities have awarded 216 Grants to 177 organisations totalling £12.6 million and Older People & Housing has awarded 182 grants to 142 organisations totalling nearly £11.1 million. The funding budgeted for each programme over the period from 1 April 2023 to 31 March 2028 is £17.8m for Church & Communities and £12.9m for Older People & Housing.

In awarding funding, we are led by the demand from charities and social enterprises. We do not look for any specific approaches or for charities to be able to provide hard metrics to demonstrate the difference made. We understand the context and the range of approaches that can be taken to tackle our priority issues.

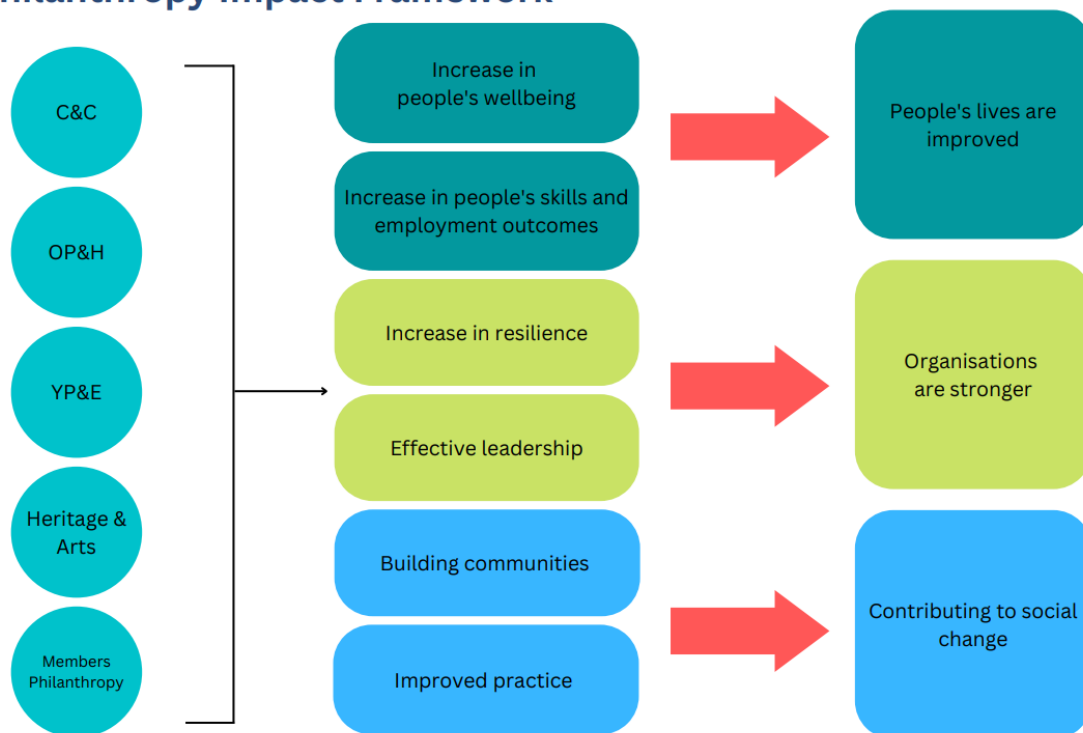
In assessing proposals, we look at the strength and merit of each application; aiming to fund a wide variety of projects across our geographical areas.

This has resulted in supporting a broad range of high-quality projects working towards several different outcomes, from parent-led initiatives to organisations that support charities working on the front line.

More information about the philanthropic work of the Mercers' Company, including the Church & Communities and Older People & Housing programmes, can be found [here](#).

The Company has recently developed an Impact Framework for the Mercers' Company philanthropy, with three key outcomes: improving people's lives, making organisations stronger and contributing to wider social change.

Philanthropy Impact Framework



The circles on the left represent all of our funding programmes, including Church & Communities (C&C), Older People & Housing (OP&H) and Young People and Education (YP&E). The third column are the main outcomes we are looking to achieve across all of our programmes. The second column are outcomes that will contribute towards the main outcomes.

Brief

The Mercers' Company requires a suitably qualified provider to:

- evaluate the Church & Communities and Older People & Housing programmes in relation to the Impact Framework;
- identify lessons that could be learnt (by charities, the Mercers' Company and other funders);
- present this in the wider context of funding and issues faced by communities and older people within England; and

- inform our ongoing approach to the programmes.

We would like to work with a provider to ascertain the best approach to achieving these objectives. However, we envisage that the evaluation will be in-depth and conducted in collaboration with grant holders. It will encompass high-level literature reviews as to the current issues in each of the sectors, observational work, surveys and in-depth conversations with grant holders and internal stakeholders at the Mercers' Company.

We expect five clear, concise and accurate annual reports to be produced as part of this evaluation work. The primary audience of these reports is the Mercers' Company and our grant holders, but it should be accessible to a variety of audiences and the final reports will be published on our website for the benefit of the wider funding and charitable sector. Reports need to be useful in relation to informing the future philanthropic work of the Mercers' Company and the charities of which it is corporate trustee, as well as for grant holders and other charities.

We would like the results of the ongoing evaluation to be presented in infographics and to include case studies, photographs, and five films.

The budget for this work is a maximum of £60,000 (including VAT, if charged, and expenses) per year, over five years.

Core deliverables

- Agree scope of learning work and project plan with the Mercers' Company and ensure close liaison with the Mercers' Company throughout the project, with regular update meetings.
- Annual in-depth conversations with key internal stakeholders within the Mercers' Company, including:
 - the two Grant Programme Managers and Grants Officers who work on the Church & Communities and Housing & Older People programmes; and
 - at least two members of each of the Church & Communities Committee and Older People & Housing Committee.
- Evaluating the difference made by and learning from our Church & Communities and Older People & Housing programmes – both individually and overall. This should be done in collaboration with grant holders. As a minimum this evaluation should involve annual:
 - short surveys of all grant holders;

- in-depth interviews with a cross-selection of grant holders;
 - a review of monitoring information submitted by grant holders; and
 - analysis of difference made by grant holders, including in relation to our Impact Framework; and
 - the cumulative impact of each programme against the main outcomes of our Impact Framework.
- Production of five clear, concise and accurate reports (one per year) in accessible language, with the following sections as a minimum:
 - stand-alone Executive Summary;
 - background regarding our Church & Communities and Older People & Housing programmes;
 - an overview of the funding awarded and support provided through these programmes, including how the grant-making programmes complement our own operational activities with respect to housing for older people and support to church livings;
 - details of the results of the evaluation of the difference made by and learning from these programmes, with reference to the outcomes of our Impact Framework;
 - a short overview of:
 - the broader context of these programmes within England and each geographical area, and how the programmes relate to that broader context;
 - how the programmes compare to those of other funders, including commentary on what the programmes do well and where improvements could be made;
 - how the programmes reflect and build on previous evaluation reports for the programmes, as well as our response to their recommendations; and
 - in light of the above, recommendations the evaluator has in relation to the programmes, charitable sector and other funders.
- All reports should be clear how the programmes are progressing in relation to our Impact Framework, with the first four reports taking a closer look at one of the following contributory outcomes:

- increase in people's wellbeing;
 - increase in people's skills and employment outcomes;
 - increase in the resilience of charitable organisations; and
 - building communities.
- The final report should provide an overview of the overall impact of each programme over the preceding five years, in relation to the contributory and main outcomes of our Impact Framework.
 - Bring grantees together to facilitate: reflection, sharing of insights and learning. These meetings to take place twice per year minimum.
 - One film per year, to reflect the contributory outcome focused in that year's report and with a final overview of the impact of the programmes in the final year.
 - At least six case studies per year (three from each programme) - of organisations that have been supported by the programme, with high quality text, photographs.
 - Findings presented in a variety of formats, including infographics.
 - Dissemination of findings, including at least three presentations per year, to include at least one Learning Event with a cross-section of our grant holders per year.
 - Liaison with the Mercers' Company communications team.

Skills and experience

The skills and experience we are looking for are as follows:

- knowledge of issues faced by the charitable sector in the UK; preferably including knowledge and experience of working in London, Norfolk, Lincolnshire and the North East;
- a demonstrable track record of evaluating charitable grant programmes;
- proficiency and experience in producing high quality reports, infographics, and case studies (in text, photograph and video form); and
- an ability to communicate and engage effectively with a wide variety of stakeholders.

Proposals

Organisations interested in undertaking this work should provide a short proposal outlining how our requirements, detailed above, will be met, including:

- the name and contact details of the lead person submitting the proposal;
- a summary of your proposed approach, including a clear timetable;
- an outline of your organisation's track record, expertise and suitability to undertake the work (including examples of previous work produced);
- a full budget outlining, fees, number of days provided (including day rates) and associated costs such as travel;
- suggested process for keeping the Mercers' Company informed of progress; and
- short biographies of key staff involved in the project, including which elements they will be working on.

Timetable

The indicative timetable for the contract is as follows:

Key Actions	Dates
Proposal Return Deadline	Friday September 15 th 2023 12.00 (Noon)
Clarification of proposals (if required)	July/August 2023
Interviews of shortlisted proposals	Week commencing October 9 th 2023
Contract Award	Week Commencing October 30 th 2023
Contract Work Commencement Date	TBC
Contract Completion Date	TBC