



Citizens Advice 1066

Request for Quotation

Project Name: SHINE Research Evaluation Service

Date of Quotation:

Company Contact:	Tracy Dighton
Department	Citizens Advice 1066
Job Title	CEO
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SUMMARY OF CITIZENS ADVICE 1066

Citizens Advice 1066 is a local charity offering the residents of Hastings and Rother information and advice on some of the most pressing issues they face today, including debt, housing, benefit entitlement, employment and relationship problems. The service is independent, confidential, impartial and free of charge, and is run with the help of around 40 trained volunteers supported by a core team of staff.

A dedicated Money Advice Unit at the bureau provides tailored help with more complex debt problems, including working with clients to manage down their debt. Specialist money advisers at the bureau work with clients - sometimes over months - to review their expenditure, maximise their income, prioritise their debts and agree a manageable repayment plan with their creditors. If necessary, they can help clients with applying for a debt relief order or bankruptcy.

A mental health programme provides debt and more general advice to clients who are experiencing mental health issues. Other bureau services include help with reducing energy costs under the Energy Best Deal programme.

A bureau Research and Campaigns team uses the experiences of our clients to lobby local and central government for system-wide improvements for the benefit of everyone. Aside from debt, the problems most frequently presented by clients locally include obtaining suitable housing - particularly in the private rented sector, poor practices by local employers and scams.

Going forward we have been busy developing our new Financial Capability service to help clients to better deal with short term financial shocks and build financial (and therefore personal) resilience over the longer term.

Further information can be found by visiting our website at www.citizensadvise1066.co.uk

REQUEST FOR QUOTATION

1. Description of Requirement

Citizens Advice 1066 is seeking to procure the services of a suitably qualified supplier of research evaluation who, as part of university or organisation, can deliver an academic's evaluation focused on behaviour change related to efficient energy consumption. Our project will involve the promotion of community-led energy initiatives and the design of an effective community engagement strategy that will achieve an increased uptake of renewable energy systems and energy saving home improvements in a target district to reduce carbon. To support this, the provider will deliver activities to evaluate the effectiveness of community engagement initiatives, energy advice sessions and resulting behavioural change. They will need to be able to monitor, analyse, quantitatively and qualitatively design evaluations and produce reports on the above interventions with qualitative assessments on the efficacy of behaviour change models and tools piloted during the project.

2. The project

Citizens Advice 1066 has been awarded grant funding from the European Union Interreg 2 Seas programme to deliver activities for the Sustainable Houses in Inclusive Neighbourhoods (SHINE) project – a four year programme with EU partners to deliver community-led initiatives to improve the energy performance of homes and reduce carbon emissions from deprived urban neighbourhoods. Information about the Interreg 2 Seas programme can be found at <http://www.interreg2seas.eu/>. The focus of the SHINE project is on developing “bottom-up” energy saving initiatives by residents, supported by networks of trained energy advisers recruited and trained during the project.

Each year the project is heavily client facing during the winter months from a launch in September/October, through an engagement campaign and advice delivery until April the following year. From April to August the work is evaluated, delivery and monitoring are re-designed, and outcomes shared with European and local partners.

3. Required Skills and Expertise

Essential

1. Familiarity with the health, social care and third sectors.
2. The ability to design and supervise evaluations of advice services, with both quantitative and qualitative elements.
3. The ability to adapt the design of evaluations in response to issues that emerge when they are put into practice.
4. The ability to analyse both quantitative and qualitative data generated by such evaluations.
5. The ability to present the findings of such evaluations both verbally and in writing, in a manner that is understandable to relevant stakeholders (such as commissioners).

6. A track record of designing and supporting successful service evaluation in the health, social care and third sectors.
7. Experience consulting to such organisations in relation to service evaluation.
8. An ability to work with and guide project teams in the third sector, to support the successful completion of such evaluations.
9. Qualifications, background and employment that provide the evaluation with a sense of authority in the eyes of the stakeholders (e.g. holding an academic post in a university, with a track record of research publications).

Desirable

1. Familiarity with the energy advice services that Citizens Advice offers.
2. A track record of successfully consulting to the Citizens Advice in relation to service evaluations.

The research evaluation provider will design an effective evaluation programme and support the delivery team in performing the evaluation tasks. They will have a proven track record in academic evaluation in the advice sector. They will be able to design and conduct surveys that capture the data on fuel poverty, health outcomes and behaviour change and measure improvements over time. They will have relevant qualifications and appropriate operating policies and procedures.

4. Professional qualifications and experience

The research evaluation provider’s staff should hold relevant professional qualifications or awards in delivering research and evaluations.

5. Responsibilities of a research evaluation provider

Services that will be provided:

The winner of the tender will provide consultation with regard to evaluating changes in the health and wellbeing associated with Citizens Advice 1066’s energy advice services. This will predominantly be in person.

The research evaluation provider will contribute and add value to the project’s objectives of:

- (i) establishing systems to monitor processes for residents from the target neighbourhood to participate in the project;
- (ii) collating reports from the SHINE partners involved in the project as a benchmark of their activities.

Specific project tasks and deliverables for the provider include:

- (i) provide advice regarding the selection and/or development of appropriate measures,
- (ii) provide consultation and advice as questionnaire data is collected (Citizens Advice 1066 will be responsible for data collection and entry),

- (iii) analyse, or support Citizens Advice 1066 in analysing the evaluation data that has been collected,
- (iv) prepare a report detailing the findings of the evaluation,
- (v) aid Citizens Advice 1066 in using information from this report to support further funding applications, and
- (vi) meet stakeholders to discuss the evaluation, where needed.

6. Budget and duration of award

The SHINE project runs from 1st September 2016 to 31st August 2020. The research evaluation service provider will be engaged from September 2018 to the project end date above and the overall budget for this work is €5,900.00 (euros).

7. Location of work

The project will be delivered in the project area of St Leonards-on-Sea, East Sussex, United Kingdom.

8. Scoring

Proposals will be scored on the following criteria:

- Value for money (30%)
- Experience of working with a client's team to develop an evaluation programme in advice or similar sector services (30%)
- Experience of outcome analysis and report writing (20%)
- Proposal for addressing project delivery and risks (10%)
- Experience of EU funded projects (10%)

9. Information to be returned:

- Company details
- Total cost and a detailed pricing schedule
- Project plan for completion of this work
- Relevant experience of your organisation and staff of providing the services identified in this brief (- please provide CVs of the personnel who will be involved in the project)
- Evidence of local knowledge and experience of working with advice or similar sector organisations.
- Summary of key project delivery risks and how you will mitigate them
- The added value of the services that you have identified in your proposal
- Environmental policy.

10. Pricing (*Supplier to complete*)

Total Cost *	<input type="checkbox"/>	€5,900.00 (euros)
Refer to Pricing Schedule	<input type="checkbox"/>	<i>If Appropriate</i>

* tick as appropriate

Company:	
Address:	
Telephone:	
Contact Name:	
Email:	
Signature:	
Date:	

11. Citizens Advice 1066 Contact Details

If you have any queries regarding this quotation please contact:

Name:	Tracy Dighton
Telephone:	07802724259
Email:	tracydighton@citizensadvice1066.co.uk

12. RETURN DETAILS

Please send completed quotations to Tracy Dighton. Contact details as above.

13. DECLARATION

If your company is not an approved supplier you will need to go through the full supplier approval process before any orders are placed

I/We accept that if we are not currently a Citizens Advice 1066 approved supplier we will require full approval prior to any orders being placed or works carried out.

I/We agree that I/we shall commence the Project when instructed to do so.

I/We confirm that the rates and prices set out in the Pricing Schedule shall remain fixed for three (3) months from the date of this Request for Quotation.

Standard Terms & Conditions of Purchase

1.0 Definitions

“Buyer” means Citizens Advice 1066.

“Seller” means the person, firm or company to whom the Purchase Order is addressed

“Goods” means the materials, articles, works & services described in the Contract

“Package” means any kind of packaging

“Authorised Officer” means the Buyer’s employee authorised, either generally or specifically, by the Buyer to sign the Buyer’s Purchase Order.

“Authorised” means signed by one of the Buyer’s Authorised Officers

2.0 The Contract

The Seller agrees to sell and the Buyer agrees to purchase the Goods in accordance with the Contract. The Contract shall comprise any order amendments, the Purchase Order, these General Conditions of Purchase, and any other document referred to on the Purchase Order. The Contract shall not include any of the Sellers conditions of sale, notwithstanding any reference to them in any documents.

3.0 Price

The Seller will sell to the Buyer the Goods for the firm and fixed Price stated in the Contract or Purchase Order. The price shall include storage, packing, insurance, delivery & installation, but shall exclude VAT

4.0 Variations

The Buyer shall have the right before delivery, to send the Seller an order amendment adding to, deleting or modifying the Goods subject to the order. If the order amendment will cause a change to the price or delivery date then the Seller must suspend performance of the Contract and notify the Buyer without delay. The Seller must allow the Buyer at least 10 working days to consider any new price and delivery date, and the Contract shall take effect when the Buyer’s authorised officer accepts in writing the new price and/or delivery date.

5.0 The Buyers Right of Cancellation

The Buyer may cancel the Purchase Order and any order amendment thereto at any time by sending the Seller a notice of termination. If the Seller submits a termination claim then the Buyer will pay to the Seller the cost of any commitments, liabilities or expenditure, which in the Buyer’s reasonable opinion were incurred in performance of the Contract at the time of termination.

6.0 Quality & description

The Goods shall:

- (i) conform in every respect with the provisions to the Contract
- (ii) be capable of all standards of performance specified in the Contract
- (iii) be fit for purpose

- (iv) be delivered in line with the quality standards of the most relevant professional qualification
- (v) correspond with their description or any samples, patterns, drawings, plans & specification referred to in the Contract
- (vi) be of satisfactory quality
- (vii) comply with Citizens Advice 1066's monitoring requirements on the project deliverables and outcomes
- (viii) comply with current legislation
- (ix) comply with Citizens Advice 1066's requirements to meet its policies and procedures, and storage of information.

7.0 Monitoring and invoicing

The Seller will submit invoices monthly to the Buyer and include an outline of the activities undertaken. The Seller will submit quarterly written reports to the Buyer explaining progress in delivering contract deliverables with a follow-up meeting of each partner's project managers. There is an expectation on regular meetings between the Buyer and Seller to clarify deliverables as the project progresses.

8.0 Work on the Buyers Premises

If the Contract involves any work or services which the supplier performs on the Buyers premises then the following conditions apply:

The Seller shall ensure that the Seller's employees, the Seller's sub-Contractors and their employees and any other person associated with the Seller will adhere to the obligations imposed on the Seller by current safety legislation or any regulations that the Buyer may notify to the Seller in writing.

9.0 Safety

The Seller shall observe all legal requirements of the UK, EU and relevant international agreements in relation to health, safety & environment, and in particular to the marking of hazardous Goods, the provision of data sheets for hazardous materials and all provisions relating to food.

10.0 Delivery

The Goods shall be properly packed, secured and despatched at the Sellers expense to arrive in good condition at the time or times and the place or places specified in the Purchase Order or Contract.

11.0 Late Delivery

If the Goods or any part of them are not delivered by the time or times specified in the Contract then the Buyer may be written notice cancel any undelivered balance of Goods. In the case of services, the Buyer may have the work performed by alternative means and any additional costs reasonably so incurred shall be at the Seller's expense.

12.0 Property & Risk

- a) The Seller shall bear all risks of loss or damage to the Goods until they have been delivered and shall insure accordingly
- b) Ownership of the Goods shall pass to the Buyer when the Goods have been delivered but without prejudice to the Buyer's right of rejection under this Contract.

13.0 Acceptance

The Buyer shall have the right to reject the Goods in whole or in part whether or not paid for in full or in part within a reasonable time of delivery if they do not conform with the requirements of this Purchase Order or Contract. The Buyer shall give the Seller a reasonable opportunity to replace the Goods with new Goods that conform to this Contract, after which time the Buyer shall be entitled to cancel the Purchase Order and purchase the nearest equivalent Goods elsewhere.

14.0 Payment

The Buyer shall pay the Seller within 30 days of receipt of a correctly rendered invoice.

15.0 The Sellers Warranty

The Seller shall promptly make good at the Sellers expense any defect in the Goods that the Buyer discovers under proper usage during the first 12 months of actual use. Such defects may arise from the Sellers faulty design, poor workmanship or use of inadequate or faulty materials. Repairs and replacements will be covered by the above warranty for a period of 12 months from acceptance by the