INVITATION TO TENDER

Terms of Reference for *Evaluating the Community Impact of* Shared Reading

Project title	Evaluating the Community Impact of *Shared Reading*
Duration	Maximum of 18 months
Expected start date	April 2019
To be completed by	October 2020

1. Introduction and Background

The Reader is a dynamic national charity and social enterprise, head quartered in Liverpool. The Reader builds stronger and more supportive communities through the unique model of *Shared Reading*. *Shared Reading* improves psychological wellbeing, social connectivity and builds a sense of purpose for thousands of people across the UK- people like David….

> "The reading groups have helped me more than anything else - they are a different kind of medicine and it's through them that I've found a way back into life."
> - David, Shared Reading group member, Birkenhead Library

Since 2002, we've been developing our pioneering *Shared Reading* model in old people's homes, community centres, hospitals, addiction rehab units, prisons, public libraries, schools and many other places across the UK. During the sessions, a piece of great literature is read aloud and explored, with the group of 6-12 participants stopping spontaneously to discuss their immediate responses in a live, shared way. There is never any pressure to read or contribute, and participation is always self-directed. *Shared Reading* group members often describe the experience as helping them to have insight, to build confidence, to share things they often could not easily say. The groups create a safe and calm space in which people feel a sense of community and a connection to themselves and others.

Currently, over 500 weekly Shared Reading activities take place across the UK, with the largest concentrations of *Shared Reading* in the North West, South West, North Wales and London. We mobilise 1000s of individuals across the country through social action, with particular concentrations of our volunteers in London, Bristol, Liverpool City Region and in North Wales.

The Reader has a collected a substantial range of evidence over the past eight years to understand and demonstrate the impact of *Shared Reading*. We gather both quantitative and qualitative data to measure our impact and have worked with both Social Investment Business and Nesta to develop our Theory(s) of Change (See Appendix).

Our current evaluation model for group members focuses on simple anonymous snapshot feedback surveys conducted every 6-12 months. The nature of our groups, as a 'no pressure' ongoing weekly activity that people can drop in to as and when they feel able, presents challenges around conducting longitudinal evaluation. In addition to this, as the majority of our groups are delivered by volunteers we are currently unable to make contact with our group members directly. This is something we hope to address through our current digital transformation programme; however at present our standard evaluation activities continue to be, for practical reasons, anonymous and paper-based, targeting large respondent population sizes to strengthen the reliability of our findings.

Results from our in-house evaluation, conducted through annual paper surveys, show that the reported benefits of *Shared Reading* span across all sectors, from young to older people, including Public Health-focused community groups.

Highlights from community *Shared Reading* groups (i.e. not criminal justice, dementia or in-patient settings):

- 94% look forward to the group as an important event in their week[1]
- 91% say the group makes them feel better[2]
- 83% made new friends in their group[3]

Alongside the internal evaluation processes outlined above, externally-conducted evaluation projects have a vital role to play in enabling the in-depth insights that snapshot evaluations alone just can't give. Such projects, built around more rigorous research methodologies, help us to learn more about causality and attribution. Together with our snapshot data, they help us to build a picture of our impact that has both breadth and depth, showing both our general overall indicative impact and the detail that helps with finer-grained learning and the generation of a more compelling evidence base.

Focused evaluation and research projects with external researchers have given us strong evidence bases for work with people affected by Dementia and Chronic Pain patients, and we are awaiting results from two independently commissioned and conducted reports into impact for our Criminal Justice groups. We have recently completed a process evaluation conducted by Renaisi, looking at how we can support our volunteer Reader Leaders to continue to deliver high quality Shared Reading groups sustainably into the future. We now feel that we are in the right place to evaluate the output of these groups, specifically within a community, Public Health context.

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[1] Out of 682 respondents, April 2017 – March 2018
[2] Out of 682 respondents, April 2017 – March 2018
[3] Out of 680 respondents, April 2017 – March 2018

2. About this Project

The Reader is at a pivotal moment in our development, where we're taking an organisational leap forward to increase impact and extend our reach. Last year we secured investment from The National Lottery Community Fund to help us transition from a staff-led delivery model to a new, sustainable model for growth and strengthen our evidence base through external evaluation.

Over the next three years (and therefore during the course of this piece of work) we aim to grow by a further 122% increasing the number of UK wide groups from around 500 to over 1000 and our average group size from 6 to 8 participants. We anticipate this growth will mostly take place in the North West, London and the South West. A key element of our growth plan is to build robust referral relationships to ensure our groups are reaching the people who need them the most. Currently group member recruitment relies on signposting from mental health services and other voluntary organisations, and good communication activities. In addition we often host groups where the people we are trying to reach already are, i.e. YMCA centres, care homes. When new Shared Reading groups are established membership tends to increase month by month, with a core group of around 6 people establishing itself and over 12 months a further 6-10 likely to pass through.

Our plan is to put *Shared Reading* into the hands of committed, trained volunteers who have the local networks, relationships and passion to set up and lead their own reading communities. We want to draw on the time and talents of many, to create The Reader Movement.

We are now in a position build the evidence base that will convince funders, commissioners and policy-makers that volunteer-led Shared Reading delivery in community settings makes a real difference to group members' lives, at the same time improving our own knowledge about the impact that our Shared Reading groups have. In consultation with Rhiannon Corcoran, Professor of Psychology at the University of Liverpool, we have developed a set of tools and methodology for retrospective feedback surveys that consistently show high self-reported impact on a large population of group members, but we need more robust longitudinal data demonstrating clear attribution to our work to complement this. Where many of our previous research projects have focused on closed populations experiencing *Shared Reading* delivered by our own staff facilitators (for example in prisons, care homes or hospital settings), **we're now keen to focus on the effectiveness of community-delivered provision.** Gathering this longitudinal data is particularly challenging in our new volunteer-led model.

3. Evaluation Specification

We wish to work with an evaluator who can plan and conduct a longitudinal evaluation/research project to take us to Level 3 in the NESTA Standards of Evidence[4] - that is we want to use a methodology that enables us to have a higher degree of confidence about causality on the outcomes. We foresee this project being a focused, specially recruited project involving a control group comparison, although would be open to other suggestions from an evaluator as to the best approach to have greater confidence in the impact data, and a stronger understanding of causality. It is important to us that the findings give us genuine insights into the effectiveness of our work rather than simply tell us the answers we want to hear. The project should therefore have a rigorous methodology and a large enough population to provide strong and reliable findings.

The evaluation may have a mix of quantitative and qualitative methods but there should be a focus on quantitative data that could demonstrate a measurable difference between *Shared Reading* and control/comparison participants.

The evaluation should be based from our Theory of Change, placing particular importance on evidencing:

- reductions in social isolation
- improvements in well-being
- increased sense of purpose in life

Where possible we would like to use leading standardised tools that are well respected and translatable to the commissioning audience. The evaluation may use bespoke quantitative measures to reflect the particular impacts of *Shared Reading* but should also contain standardized items to ensure translatability to a broad commissioning audience.

We foresee that candidates may include early career researchers, academic teams or independent evaluation bodies.

4. Budget

The maximum budget for this Evaluation is £50,000 (inclusive of VAT and any travel costs).

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[4] Details of NESTA's Standards of Evidence can be found at https://www.nesta.org.uk/feature/centre-social-action-our-evidence-base/nestas-standards-of-evidence/

5. Proposed Approach and Methodology

Our Evaluation Team has prior experience of working with academic researchers on the design and implementation of evaluation projects. We value learning from research expertise and – as such – appreciate that tenders may put forward an alternative methodology from that outlined below. We also understand that the successful candidate may wish to co-design elements of the evaluation or adapt their evaluation plan following discussions with The Reader, informed by our current evidence and operational learning.

On appointment, we will expect the successful candidate to work closely with our Monitoring and Evaluation Manager and Director of Programmes to confirm the most appropriate project shape, questions and methodology within the first month of the project. Once the evaluation approach has been agreed with this team, The Reader's Director's Group and National Lottery Community Fund, it will be the consultant's responsibility to recruit participants, design evaluation tools and collect and analyze the data. Findings should be condensed into a clear, high-quality report with executive summary that outlines the methodology, rationale and results and places these within the context of The Reader's standard evaluation findings and wider Public Health evidence.

We anticipate the evaluation methodology will involve:

- Recruitment of well-matched and representative participant and control populations (with clear rationale for sampling and selection) to join new Shared Reading groups run by established and more recently trained volunteer Reader Leaders
- A clear articulation of the rationale determining a sample size that should yield statistically significant and reliable findings
- Demographic analysis of participants with consideration of how typical they are of The Reader's current/target participant populations
- Design of questionnaires including standardized quantitative measures
- Consideration of Data Protection law and research ethics, with appropriate communication and consent procedures for participants
- Baseline and end of intervention longitudinal data collection (with the possibility of additional mid-point or post-intervention follow-up)
- Data inputting and analysis through appropriate software (e.g. SPSS)
- Consideration of group facilitator and participant variables (e.g. length of time volunteering, demographics of group members) within analysis of the final data

The Reader will be able to assist in the recruitment of volunteer Reader Leaders to the project, and promote the groups through our social media channels. However, we will expect the successful candidate to lead on the advertising and recruitment of participants for the study.

This project will need to be located in an area where we have an established hub of volunteers. Our two regions of greatest concentration are the North West (Liverpool, Sefton, Wirral, Halton, Knowsley, St Helens, Cheshire, Warrington) and London; however geographical alternatives (especially Wales and the South West) may be negotiable.

We appreciate that there is always a risk that projects of this kind may not return statistically significant findings. We are looking for candidates who can offer us challenge and rigour, helping us to arrive at a robust and representative study, the design of which will nevertheless give us a strong chance of evidencing meaningful impact. We welcome your ideas for how to best achieve this, given the constraints of the project.

This project will be overseen by Jennifer Jarman, Monitoring and Evaluation Manager at The Reader, who will report on progress to the Director of Programmes, The Reader's Directors Group, the Board of Trustees and National Lottery Community Fund.

6. Conditions of Participation

1. We ask that tenders are no longer that 20 pages. Participants must be able to provide within the application evidence of appropriate experience and expertise in the field of evaluation including but not limited to:
   - Previous demonstrable experience on a project of a similar type and budget delivered to a high standard
   - Experience of evaluating or working with an organisation outside of an academic setting
   - Evidence of the use of appropriate techniques for collecting and analyzing relevant data
   - Creative thinking, problem solving and flexibility skills
   - Strong knowledge of work in this sector

2. Participants must able to provide evidence that they are a responsible and ethical practice with values in alignment to that of The Reader.

3. Participants must be able to set out how their organisation's data protection policies comply with current legislation.

4. Participants must be able to provide full contact details of two references, at least one of these evidencing evaluation that has taken place in community settings.

Failure to fully satisfy any of the conditions described above may result in the disqualification of the tender. All matters of disqualification on these grounds will be communicated to the individual bidder without reasonable delay.

7. Tendering Process

The deadline for the submission of tenders is **Monday 11 March 2019 at 9am.** A full electronic copy of the tender including any annexes and supplementary material as part of one document in MS Word or PDF format should be emailed to Jennifer Jarman at jenniferjarman@thereader.org.uk

If, on checking the Tender documents, errors of extension or addition are discovered, the Tenderer will be given the opportunity of confirming their offer and amending the Tender to correct such errors.

Tenderers are required to return the following information;

i. Suitable evidence to demonstrate that all items for "Conditions of Participation" have been fully satisfied

ii. Your understanding of the challenges of this project

iii. Introduce a capable and experienced team that can provide all of the skills identified in Section 3

iv. Include a proposed methodology including indications of population sizes, recruitment and sampling strategy, measures and evaluation design (we appreciate that this may subject to change)

v. Include a project timetable for how the work will be undertaken and completed within the proposed timeframe of the project

vi. Include a table showing exactly who will deliver each set of tasks

vii. CVs of relevant staff members as appendices.

viii. In accordance with the budgeted figure of £50,000, submit a breakdown of costs for works required along with a fixed total fee. Your fee should be itemized and inclusive of all day rates, travel and subsistence expenses, consultation costs and any other administrative costs. Costs should be inclusive of VAT and state whether the VAT is chargeable.

ix. Evidence of PI cover (minimum of £1 Million for each and every claim). If this is not available you should confirm that you would be eligible to obtain this level of cover if appointed.

x. Evidence of Public and Employer Liability Insurance (minimum of £1 Million). If this is not available you should confirm that you would be eligible to obtain this level of cover if appointed.

xi. Any additional services that can be offered separately to the tendered roles and prices for those services where applicable.

xii. Any omissions, exclusions or qualification items that the Client needs to be made aware of.

Once the deadline for tender submissions has passed the tenders will be scored according to a set criteria as follows:

Price – The price of the tender will be scored and considered at a maximum weighting of 10%.

Quality – The quality of the tender will be scored and considered at a maximum weighting of 90%.

The quality weighting will be broken down accordingly as per the tables below.

Quality	Knowledge (Understanding a Project Brief)
20%	Does this bid demonstrate the candidate's ability to review and absorb knowledge from a Client brief and how their capability addresses the project needs listed therein? What knowledge does the candidate demonstrate of wider Public Health impact evidence requirements?
Quality	Technical (Skills & Resources)
35%	Does this bid demonstrate the required capability to deliver the project successfully? Have suitable resources, skills and personnel been identified and matched against the project deliverables? Is a well-considered level of robustness and rigour evident in the proposed methodology?
Quality	Capability (Problems & Innovation)
35%	Does this bid demonstrate the ability to respond to problems encountered on the project? Has the candidate put measures in place to mitigate risk and maximize a successful outcome for the project?

Quality scoring for each criteria item

Excellent	Exceeds the required standard. Provides relevant information accurately and demonstrates added value.	9 to 10
Good	Meets the standard required. Comprehensive response to information requested.	7 to 8
Acceptable	Meets the standard in most aspects but fails in some areas. Acceptable level of detail, accuracy and relevance.	5 to 6
Limited	Fails the standard in most aspects but meets some. Limited information and partially answered questions.	3 to 4
Inadequate	Significantly fails to meet the standard. Inadequate detail provided and fails to answer questions.	1 to 2
Cannot be Considered	Completely fails to meet the standard. Responses deficient or items missed completed and unanswered.	0

Once scores have been confirmed, the highest scoring tenders will be shortlisted and invited to attend an interview. Once we are satisfied with all of the information presented the final appointment will be made and contracts prepared and exchanged thereafter. If at any stage the highest tender chooses to withdraw their offer, The Reader may opt to make an offer to the next highest scoring tender or repeat the tender process in full.

If you have any queries about the project or the application process, please contact Jennifer Jarman at jenniferjarman@thereader.org.uk 0151 729 2200 before 5pm Monday 18 February 2019.

8. Timetable for Appointments

Date	Stage
4 February 2019	Issue of the ITT documents to Candidates
11 March 2019	Receipt of tenders from Candidates
18 March 2019	Review, clarification, shortlisting of tenders
11 March 2019	Interviews with Candidates (subject to change)
25 March 2019	Final evaluation of tenders; notification of appointment of successful Candidate
1 April 2019	Appointment of successful Candidate; project begins

The Reader reserves the right to amend this timetable as required.