

Invitation to Tender (ITT)

Impact+ Exercise User Research 2019

Introduction

Erasmus+ is the EU programme for education, training, youth and sport. The Erasmus+ programme will run from 2014-2020 and supports activities in education, training, youth and sport across all sectors of lifelong learning including higher education, further education, adult education, schools and youth activities.

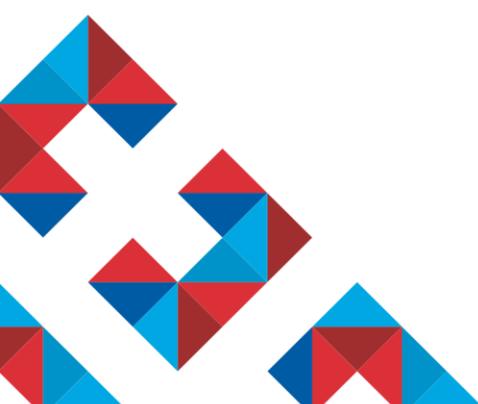
Erasmus+ is managed in the UK by the UK [National Agency](#). The UK National Agency is a partnership between the British Council and Ecorys UK.

Part of the role of NAs is to support programme applicants and beneficiaries. A major aim of the programme is to achieve maximum impact of the activities and NAs have a role in helping programme applicants and beneficiaries to achieve impact.

The UK NA, in partnership with the Slovenian NA and with input from several other NAs, designed a set of support materials collectively called the [Impact+ Exercise](#). The Exercise aims to help the user explore, identify and evidence the impact of their activities.

The Exercise materials were tested with 25 beneficiaries during a workshop in May 2016. A small qualitative research project involving these participants was undertaken in May-June 2017. The report of that research is available [here](#). Two further workshops were run in autumn 2017 and the follow-up research report is available [here](#).

In September-October 2018, two further workshops ran involving a total of 39 participants, of which 16 were from UK funded projects or a UK partner. Twenty-two participants were running vocational education & training (VET) projects, 16 were running adult education (AE) projects and one was an observer from the Luxembourg Erasmus+ National Agency. The workshops included sessions on the Impact Exercise and identifying stakeholders for impact. Workshops were conducted in English.



Scope

This project will contact all participants to investigate the impact of the workshops.

All workshop participants were advised that they would be contacted to participate in optional follow-up research at the workshop. We have email addresses, telephone numbers and postal addresses for all participants.

The following materials will be available to the research team:

- Copies of all the workshop materials (slide packs, practical exercises).
- Participant application forms which include statements of hoped-for benefits of the workshops, the intended application of learning, a project summary, personal statement and details of other Erasmus+ projects the participant or their organisation is involved in.
- Simple feedback forms from all 39 participants rating various elements of the seminar and including some qualitative comments reflecting on the workshop.
- All participants were offered a short follow-up advice session. Eleven of these have been scheduled and notes and materials will be provided.

We are interested in a research design that includes some follow-up with the project partners of workshop participants and that examines and assesses some of the materials produced as a result of implementing the Impact+ Exercise within a project partnership.

This will be the third round of research with workshop participants. We are happy with the previous research designs but would also be interested in hearing proposals for something different or innovative. Submitted tenders could provide a more than one research design and / or optional activities. If so, it must be clear what the preferred option is and costs for each design / approach must be provided.

The contractor will be asked to contribute to communication and dissemination of the research findings. Activities could include writing articles or blogs for the UK Erasmus+ NA website, other relevant websites or print publications, submitting academic journal articles or presenting findings at conferences or seminars. All activities would need to be discussed with and approved by the UK Erasmus+ NA in advance and copy approval would be required.

Key Questions

The main focus of the research should be to understand how the workshop has helped participants to explore and understand the impact of their Erasmus+ project and what changes they have made to the way they approach impact assessment at personal and organisational level. In particular, we want to know whether they have used the Impact+ Exercise or not.

The two specific research questions we wish to answer are:

- 1) Did the Impact+ workshop help individuals to identify and understand the impact of their Erasmus+ project?
- 2) Has their learning from the Impact+ workshop produced changes in the way the individual and / or their organisation approaches impact assessment?

To answer the research questions we anticipate that the researcher will need to explore the following:

- Did workshop participants use the Impact+ Exercise? If yes, was this on their Erasmus+ project, other projects or both? If no, why not?
- If the Impact+ Exercise was used, how was it used? With partners or without, at the start / end of the activities, as a one-off or a live exercise?
- What changes in project management or impact assessment have they made as a result of using the Impact+ Exercise? Are these limited to their Erasmus+ project? Have they applied these changes to other activities?
- What data collection methods, data sources and analysis techniques did they use?
- Is the Impact+ Exercise being used elsewhere in their institution? To what extent?
- What changes to organisational practice have been implemented as a result of using the Impact+ Exercise?
- If the workshop participant has implemented the Impact+ Exercise with their partners, what do their partners think about the exercise and its benefits?
- If the workshop participant has implemented the Impact+ exercise with their partners, what impact assessment materials have they produced as a result? (e.g., a project Impact+ Exercise, an impact/evaluation plan). What are the strengths and weaknesses of these materials? What lessons can we learn to improve the Impact+ Exercise guidance?

Outputs required

- A polished draft report for comments.
- A final report of around 20-30 pages for publication on the Erasmus+ website, including
 - Summary (1-2 pages)
 - Overview of the research questions, design, methods used & analysis approach
- Separate annexes to the report, including
 - Research tools (e.g., topic guides, questionnaires)
 - Detailed overview of the research design and analysis approach
- At least four (4) one page case examples for dissemination purposes (subject to suitable projects being identified)

Timescale

12 November 2018	Invitation to Tender issued
07 January 2019	Deadline for tenders
11 January 2019	Decision communicated to bidders
w/c 14 January 2019	Start-up meeting with successful bidder, Birmingham, UK
31 May 2019	Draft report deadline
w/c 3 June 2019	Presentation of research, Birmingham, UK (if required)
14 June 2019	Delivery of final report & case studies (x4)

Contract value

A maximum of £12,000 including all fees and expenses but net of VAT.

Tender Requirements

Tenders should be submitted for the attention of Steven Murray by email to eplusimpact@ecorys.com. The deadline is **Monday 07 January 2019 at 10am**.

Questions may be submitted in writing to the eplusimpact@ecorys.com before 17:00 on Wednesday 19 December 2018. Questions received and the answers given will be posted on the Erasmus+ website alongside the ITT notice.

Tenders should be a maximum of 14 pages of A4, excluding the title and contents pages. If a tender exceeds 14 pages, only the first 14 pages will be considered. Proposals should include the following information:

- An outline of the proposed research design, research techniques, analysis approach.
- Communication and dissemination activity.
- Pen portraits of the project team.
- Examples of at up to three similar or otherwise relevant projects conducted by the team.
- An outline timescale, including key points / dates.
- Project risks and proposed actions to minimise them.
- Project and quality management in delivery and analysis.
- An outline budget showing no. of days per team member, day rates, expenses, other costs.
- Contact details of two references who can be contacted if required.
- Detailed CVs of team members can be included as an annex outside of the 14 page limit.

Tender Assessment

Tenders will be assessed against the following criteria. Each criterion will be ranked 0-5 and weighted. Verbal feedback will be offered to all tenderers.

Criteria	Relevant proposal sections	Weighting
Understanding of the project requirements	Research design, communication & dissemination, risks, timescale	35%
Project team and experience	Pen portraits, CVs, previous projects	20%
Project management	Risk management, quality management	10%
Value for money	Budget, research design	35%