

Request for Quotation

Contract Title: Evaluation of the *CWTCH Cymru* Project

Contract Ref: 20_21-0074T

CYMRU
VERSUS
ARTHRITIS



Ariennir gan
Lywodraeth Cymru
Funded by
Welsh Government

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Introduction

Versus Arthritis is looking to engage with a professional organisation to develop and implement an **evaluation of the CWTCH Cymru project**. We invite you to submit a response to this tender document in accordance with this brief.

Versus Arthritis

Versus Arthritis has offices in all four nations of the United Kingdom, including our **Cymru Versus Arthritis** team. It is estimated that over 29% of the population in Wales (approximately 887,000 people) live with an MSK condition.¹ Our vision is a world that no longer tolerates the impact of arthritis.

We refuse to accept arthritis insidiously stealing life from people. Together we demand and deliver better.

At Versus Arthritis, we believe that all of our activities must work together to build recognition of the impact of arthritis. In this way we will create a platform for large-scale change and generate income that matches the ongoing levels of investment required to meet the needs of people with arthritis today and the breakthroughs of tomorrow.

We must be ready to provide the support and solutions that people will look for as our activities catalyse and galvanise communities who push back against arthritis, demand more and drive big change.

Our unwavering focus is on action that leads to change, at scale, to improve the lives of those living with arthritis, now and in the future. We want to fundamentally change the perception of arthritis – pushing back against apathy, raising visibility of the impact of arthritis and empowering people with arthritis to demand more.

We are working hard to answer the challenges that people with arthritis face and are supporting people with arthritis through our website, virtual assistant, social media channels, helpline, online forum and publications. We also support people locally through our branches, groups and local involvement and touchpoints. We work with organisations and professionals shaping and delivering care so that information, services, support and products are available and people can live well with arthritis.

Discovering interventions and treatments for the future is just as important and we continue to invest in ground breaking research that will deliver these, influencing others to do the same.

Background to the Requirement

The CWTCH Cymru project ('Communities with Touchpoints Can Help') is being led by Cymru Versus Arthritis. It will run for a period of three years from 1st April 2020 to 31st March 2023. The project aims to empower people with arthritis to be agents of their own health and wellbeing, and to enable healthcare professionals (HCPs) and people with arthritis to work together to develop and sustain community-powered services.

¹ Versus Arthritis (2019) State of MSK Health 2019

The project will support a range of activities that will be bespoke to each local area where CWTCH Cymru operates, dependent on the needs of local communities, including:

- Information sessions
- Improved access to established services
- Peer support networks
- Activity classes
- One-to-one support
- Tailored workshops
- Signposting to local services

CWTCH Cymru will serve as a pilot for a new model of innovative, community-developed, and holistic support – ‘Touchpoints’ – delivered at scale and involving people with arthritis at the heart of the development process. The pilot aligns closely with one of Versus Arthritis’ six ambitions: ‘Wherever you are in the UK there is a local touchpoint with us.’

People with arthritis will be proactively engaged in each location to co-develop a range of preventative and early intervention support options. This includes promoting and providing volunteering opportunities – training people to be advocates for health in their local communities.

CWTCH Cymru project delivery will cover three broad areas of activity:

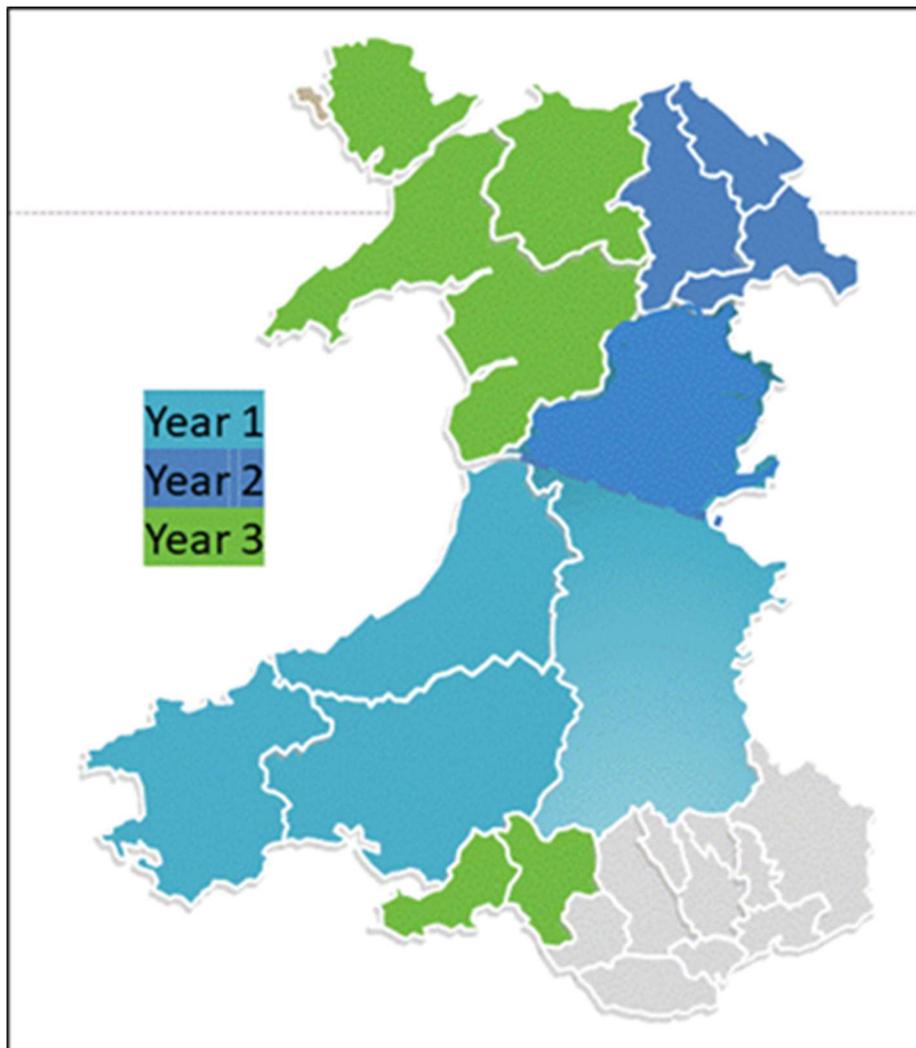
- **Collecting and sharing information and insight – local information hub**
 - Providing general insight about the needs of local stakeholders in each area
 - Providing information to people with arthritis and other stakeholders about living with an MSK condition and the availability of local services
- **Helping to improve locally available support – catalyst and enabler**
 - Participating in the design and co-production of new services, delivered by Versus Arthritis or by others (e.g. Health Boards, Local Authority, Third Sector and other partners / stakeholders, etc.), including involving volunteers
 - Working with partners, influencing decision-making to improve existing local services and access to services
 - Launching and supporting new local groups and activities
- **Directly supporting people with arthritis – provider of services**
 - Offering support to help people navigate through their personal health pathway, including signposting and providing information about self-management, shared decision-making, physical activity, etc.
 - Facilitating peer support groups and delivering individual support, e.g. emotional support, goal setting, sharing experiences, etc.
 - Training healthcare professionals, social care staff, carers and other third sector organisations about what it means to live with arthritis and how to engage with people with arthritis

Some of the CWTCH Cymru delivery activity exists already. For example, Versus Arthritis’ *Core Skills in MSK Care* programme is designed to improve the skills and confidence of GPs to improve the

consultation process and care pathway for people with arthritis, with over 15,000 UK GPs across the UK having participated already.

The CWTCH Cymru project aims for just over 10,000 beneficiaries (interactions with people with arthritis) across the course of three years (1,700 in year one, 3,200 in year two and 5,300 in year three). The first year will concentrate on areas in West Wales and South Powys; year two will move the project into North Powys and North East Wales; and year three will see extension into West Glamorgan, North West Wales and Anglesey. The decision over where to deliver CWTCH Cymru (and when) was made based on evidence of where the need is greatest and where Versus Arthritis can make the biggest impact. The charity expects the service could be expanded across South East Wales in the longer-term if the three-year pilot is successful.

Understandably, delivery in year one has been affected by the COVID-19 pandemic and social distancing restrictions, so the priority has been on set-up of project systems, recruitment, refining delivery plans to account for COVID-19, and testing. Full launch of the project for participants is not expected until later in 2020.



The project has been designed so that it is scalable across large geographic areas and supported by Versus Arthritis' remote-access resources, including the charity's helpline, virtual assistant and online community.

Recognising the multifaceted impact of arthritis on people's lives, the primary beneficiaries of the project will be individuals with a range of disabilities and long-term health conditions, proactively aiming to support adults and young people with physical and mental health. The project is designed to be fully inclusive and accessible, with materials available in a range of formats and in English and Welsh languages.

While people from the BAME or LGBTQI communities are not being specifically targeted through this project, data will be collected on participants' ethnicity and gender identity to ensure the project is reaching a representative cross-section of the population at large. The project will be promoted through commercial and third-sector organisations that work specifically with a range of groups so as many people as possible are aware of how to get involved.

Three-year targets for the project include:

- 200+ volunteers recruited
- 100+ community events, workshops and information days
- 100+ third sector groups engaged
- 70+ new support / activity groups set up

Impact will be measured using the seven Wellbeing Goals and Principles of the Wellbeing of Future Generations (Wales) Act 2015,² contributing to a healthier Wales that is more equal, prosperous, resilient, and globally responsible. Delivery will be promoted in Welsh and will help to activate and sustain cohesive communities. The project's intended outcomes are:

- To reduce the number of people with arthritis who are confronted with extreme pain daily
- To improve the health and wellbeing of people with arthritis, with greater confidence to manage their condition
- To empower people with arthritis to live more independently, with adequate support
- To reduce the isolation and loneliness experienced by people with arthritis
- To enable people with arthritis to use their voice for change

Contract Overview

Versus Arthritis is looking to engage with a specialist organisation to develop and implement an evaluation of the CWTCH Cymru project and to report on the findings. The contract is expected to commence in October 2020 and run until the end of the project in March 2023. The contract will run for a max of three years period, subject to operational performance.

² <https://futuregenerations.wales/about-us/future-generations-act/>

The contract consists of three phases:

Phase 1: Inception and impact baselining (October 2020 – March 2021)

We wish to have an evaluator in place to lead on impact baselining as soon as possible.

Although we have an M&E framework that is already in place for the project, we are seeking assistance from the evaluator to build an accurate impact baseline: advising on which key areas to prioritise measuring progress against; setting out how an impact baseline could be achieved in practice; and undertaking any research necessary to produce the baseline. At a minimum, we anticipate this phase will involve a review of background documentation and other relevant literature, plus scoping interviews with key contacts.

Output: impact baseline written report / presentation.

A second element of this first phase is to refine the proposed approach (bid document), inception and learnings from phase 1 into a more detailed workplan for the interim and final evaluation (phases 2 and 3).

Output: refined workplan for interim and final evaluation.

Phase 2: Interim reporting (April 2021 – March 2022)

At an agreed interim point in the project (e.g. March 2022), we would like to understand how the project is delivering against its aims and how the delivery mechanisms are working, as well as identifying the barriers and enablers to reaching as many people as possible, and how this differs between sites / delivery formats. We also wish to understand more about the value of the service to participants and other stakeholders. The evaluation should provide some commentary on the scale of wider effects, e.g. economic, social and health / wellbeing returns. The primary purpose of the interim evaluation will be to inform any possible changes to the project for continuous improvement.

Output: interim evaluation written report / presentation.

We also wish for a small number of short case studies to be produced to accompany the interim report, focusing on individuals or groups, and providing a person-centred perspective on their participation and outcomes experienced. These should be written so that they can be read as standalone documents.

Output: small number of case studies highlighting personal stories from the project so far.

Phase 3: Final reporting (April 2022 – April 2023)

The final report will focus on assessing and evaluating the impact of the project over its three-year course. This will include assessing progress against impact baseline and intended outcomes (to date and expected), testing key project hypotheses and factors affecting contribution / attribution, exploring unexpected outcomes, and highlighting project achievements. There will be an emphasis on demonstrating impact and what works (where, why and for whom), although the evaluation will also be expected to provide evidenced recommendations surrounding the rationale and strategic support for future continuation of the project.

Output: final evaluation written report / presentation.

We would also like a similar number of short case studies produced to accompany the final report to provide a personal perspective on the project, using the same format as the interim report case studies.

Output: small number of case studies highlighting personal stories from the project.

Evaluation Questions

The evaluation questions for phases 2 and 3 are expected to cover the following:

Operational review

- **Delivery:** What have been the key factors affecting the project and user journey (referral mechanisms, role of healthcare professionals, effectiveness of promotion and recruitment, planning and management)? How does this differ between project locations / formats?
- **Reach:** Are people with arthritis aware of the project? Who are we reaching through the project? What are their motivations? How can we develop the project to reach new audiences?
- **Satisfaction:** Are people finding it useful? Does it meet their needs? What changes can we make to our processes to deliver a higher quality service? What has worked particularly well?
- **Self-management:** Do participants understand where this project fits into personal self-management? Do participants recognise the benefits of self-management?

Impact Review

- **Outcomes:** Is the project achieving its intended outcomes? To what extent are outcomes attributable to the project? What are the wider economic, social and health / wellness effects?
- **Overall value:** What is the added value of the project to participants and stakeholders? What is the counterfactual? Does the project represent value for money?

Strategic review

- **Purpose:** To what extent is the project's focus and scope clearly defined and understood internally and externally? Are the aims and objectives of the project still relevant?
- **Context:** What have been the key internal / external factors affecting the project since it started? How does it align with other activities delivered through Versus Arthritis? How is it affected by any changes to the Welsh Government priorities / context?

Evaluation Audiences

The evaluation findings are expected to be of interest to several groups:

Versus Arthritis

- Informing relevant Heads and Directors on the success of this pilot model and to help shape the Charity's wider Local Touchpoints offer

- Supporting the CWTCH Cymru Project Manager and Cymru Versus Arthritis Director with an independent assessment of the project's strengths and opportunities for improvement and future development
- Offering rigorous evidence to be used in broader charity communications to highlight how we are making a difference for people with arthritis.

Welsh Government (funders)

CWTCH Cymru is being funded by the Welsh Government's *Sustainable Social Services Third Sector Grant (Phase 2)*. The purpose of the grant is to support Welsh Ministers' priorities:

- A new and equal relationship between people and practitioners
- Early intervention and prevention
- Transforming the way needs for care and support are met

This was first set out in *Sustainable Social Services – a Framework for Action*³, and has been placed on a statutory footing by the *Social Services and Wellbeing (Wales) Act 2014* that was brought into force in April 2016. The grant provides funding for projects delivered by third sector organisations with a proven track record in delivering projects and knowledge and / or experience of the social care sector.

British Red Cross (referral partners)

The CWTCH Cymru project is being supported by the British Red Cross, who have agreed to work collaboratively with Versus Arthritis to ensure co-production of self-management activities and community events, allowing beneficiaries to receive the support they need. British Red Cross have agreed to refer over 300 beneficiaries with MSK conditions during the three-year period to March 2023 to access the range of project activities available through CWTCH Cymru, as well as encouraging staff and other partners to attend relevant available training.

Project participants

We intend to share the headline evaluation findings with project beneficiaries and volunteers, including setting up mechanisms that allow participants to track their own progress and impact on a rolling basis, not only at formal reporting milestones.

Out of Scope

Versus Arthritis is developing a UK-wide 'Local Touchpoints' pilot programme that has a broader remit than CWTCH Cymru – the Local Touchpoints pilot is based around testing new models of charitable presence and full delivery offer across the UK, and is currently preparing to pilot in six locations. One of these six provisional locations is Haverfordwest, so the CWTCH Cymru project team is taking steps to ensure data collection and monitoring processes will be consistent between the CWTCH Cymru project and the Local Touchpoints programme while also allowing for differentiation of data between

³ <http://www.wales.nhs.uk/sitesplus/documents/829/WAG%20-%20Sustainable%20Social%20Services%20for%20Wales%202011.pdf>

the two. Evaluation activities relating to the broader Local Touchpoints programme are not within scope of this contract.

Key Deliverables

We expect the evaluation to produce the following key deliverables:

Phase 1

- Impact baseline research findings (March 2021)
- Refined evaluation workplan – preparing for phases 2 and 3 (March 2021)

Phase 2

- Interim report – process evaluation with commentary on emerging impact and strategic context updates (by March 2022)
- Case studies – first wave of case studies (by March 2022)

Phase 3

- Final report – highlighting project achievements and impacts / value for money, along with headline operational findings, plus strategic recommendations (by March 2023)
- Case studies – second wave of case studies (by March 2023)

Assumptions and Constraints

Welsh Language

Cymru Versus Arthritis is committed to the advancement and use of the Welsh language and the project is actively producing publicity, promotional materials and other project resources bilingually. We are aware that Welsh is the first language of many people in our project locations, particularly in mid-Wales and parts of North Wales.

We expect the successful bidder to be able to engage and represent Welsh language speakers on the same level playing field as English speakers, and this extends to evaluation-related communications with participants, research tools and interview guides, and being able to conduct any of the evaluation research with Welsh and English language speakers as a matter of course. The contractor is responsible for this and, if necessary, the budget should include provision for interpretation and translation services (e.g. if the proposed team does not include one or more members who can speak Welsh).

For the key deliverables, the contractor will be responsible for making these available to Versus Arthritis in English. Versus Arthritis will take responsibility for translating final versions into Welsh (i.e. outside the budget for this contract).

Impact of COVID-19

The effects of COVID-19 will clearly have a significant impact on how the evaluation is conducted, and we expect bidders' proposals to take account of this, particularly implications around engaging people with physical disabilities who may still be shielding. Regarding liaison with Versus Arthritis, the charity has a well-developed IT infrastructure for hosting teleconferences (Microsoft Teams) and sharing documentation (SharePoint) to allow remote-working, both of which are available to support the evaluation.

Engaging participants in the evaluation process

The CWTCH Cymru project is planning to collect and store contact information for all participants taking part in activities, plus others who may wish to be kept informed about the project. While we will not share contact details directly with the successful bidder, Versus Arthritis can contact beneficiaries for evaluation research purposes on behalf of the evaluator.

The CWTCH Cymru project is an innovative new model of delivery for Versus Arthritis and we expect this test-and-learn approach to extend to the evaluation. We invite bidders to propose research approaches that are inventive and adaptable to different local areas, and methods that draw out the journey of change for participants (including volunteers), e.g. making clear the starting points for individuals, their motivations and how they develop, diaries and sharing how the project is having an impact on them, and collecting evidence of impact from a range of sources.

Budget

Bids should not exceed £30,000 (excluding VAT), although this budget does not include expenses such as travel (please see our supplier expenses policy - appendix 6).

Supplier Requirements

We expect the successful supplier to be able to demonstrate the following:

- A strong track record in delivering high quality evaluations
- A strong understanding of the processes involved in delivering a service such as the CWTCH Cymru project and an ability to base recommendations on this understanding
- Experience evaluating health and wellness services similar to the CWTCH Cymru project
- A professional and respectful ethos in communicating with project participants and staff
- Robust quality assurance and data management protocols

We invite responses from organisations that can demonstrate the ability to provide the services outlined in this document. Bidders are required to return their written statement and any supporting documents electronically no later than **Friday 25th September 2020**.

Terms and Conditions

The successful Bidder will be expected to comply with the following:

- Versus Arthritis Terms and Conditions (Appendix 4)
- Versus Arthritis expenses policy (Appendix 5)
- To comply with the General Data Protection Regulation (GDPR) in the delivery of the services and when collecting, storing, and processing Personal Data, and to indemnify Versus Arthritis against any losses suffered as a result of any breach.

Instructions to Bidders

These instructions are issued for guidance and will not form part of the Contract.

The Nominated Contact for all queries relating to this Contract Opportunity is:

Sabrina Knjazev – Senior Procurement Officer

Bidders are advised that this procurement will be conducted entirely through the In-Tend e-procurement system and the Charity will not take any responsibility for non-receipt of documents and/or communications submitted outside of this route

NB. The max file upload into the portal is 20MB. We normally recommend a working individual file size limit of 15-20MB

Any supporting information should be indexed with reference to each question or section of the bid it relates to. Failure to do so may affect the evaluation score.

Tenders shall remain valid for a period of at least **one hundred and twenty (120) days** following the stated closing date.

Tender prices shall be exclusive of VAT.

Any questions or issues relating to the portal should be sent for the attention of the nominated contact at procurement@versusarthritis.org

Bidders to inform themselves

The Charity has taken all reasonable care to ensure that the information in this documentation is accurate; however, the Charity gives no representation or warranty as to the accuracy or sufficiency of the contained information.

Questions and Queries

Bidders are strongly advised to familiarise themselves with the content of the Request for Proposal documentation and all supporting information. It shall be the Bidder's responsibility to request

clarification from the Nominated Contact where necessary to ensure they fully understand the requirement of the Contract.

Bidders are advised that for this process to remain fair and transparent, all queries or questions in relation to this contract opportunity are to be requested in writing through the In-Tend portal to the nominated contact no later **than 11th September 2020**.

Any questions received after this date will not normally be accepted and response will be at the discretion of Versus Arthritis.

Our Charity reserve the right to share ALL questions and their responses with ALL Bidders, we therefore suggest that Bidders identify questions that are commercially sensitive. All commercially sensitive questions and responses will receive a direct response and will not be shared

All questions (except for those deemed commercially sensitive) will be anonymised and circulated and a full response will be provided to ALL Bidders by the **16th September 2020**.

Costs of preparing responses

It is the responsibility of Bidders to obtain for themselves, at their own expense, any additional information necessary for the preparation of their Tender and the cost in preparing their Tender submission shall not be reimbursed.

Confidentiality

All information supplied by our Charity in connection with the Contract Opportunity shall be treated as confidential by Bidders, except that such information may be disclosed so far as is necessary for the purpose of obtaining guarantees and quotations necessary for the preparation and submission of Bids.

Acceptance of these Conditions

By submitting a response, Bidders are deemed to have acknowledged and agreed to the conditions outlined in this document.

Response Requirements and Submission of Documents

To respond to this brief, Bidders are required to complete and return the following documentation by the dates indicated in the table below

Form/Document	Date/Time
Form A - Notification of Intent (NOI)	Friday 18 th September, by 4:00 pm

In addition to the above, Bidders are required to submit a written response outlining how they aim to fulfil this contract.

Responses should include the following information:

Submission Details

Please submit a written statement of no more than six pages to address the following:

1. Professional summary: introduction to your organisation and why you feel you can provide the required services
2. Evaluation-specific requirements: briefly outline your understanding of the key issues or challenges that you anticipate as part of the assignment and how these will be managed
3. Proposed approach: please detail how you would achieve the evaluation deliverables, including how your approach meets the requirements of the brief and demonstrates added value; plus a visual overview of the timetable (main phases / stages / milestones) for your proposed approach
4. Proposed team and project management: a brief overview of the key personnel, individuals' relevant experience, division of responsibilities, and summary project management protocols (optional: individual CVs can be included in your submission outside of the six-page limit)
5. Experience statement: a summary of relevant projects you have worked on in the past five years, plus a more detailed summary for one example with appropriate referee contact details

In addition to your written proposal, bidders are asked to also provide the following information.

- Commercial questionnaire – to be completed through In-Tend
- **Form B** – Detailed costings as outlined in the price schedule (incl. standard rate card against allocated resources, resources/materials, development costs, and any other outlined expenses .

The deadline for your written response is **4:00pm Friday 25th September 2020**, late submissions will only be accepted at the discretion of Versus Arthritis

Evaluation and Shortlisting Process

All responses to this opportunity will be evaluated and scored independently by a panel of stakeholders consisting of the following members:

- Mary Cowern – Wales Director
- Wayne Morgan – Living Well Manager – CWTCH Cymru
- Samantha James – Monitoring and Evaluation Officer
- Sabrina Knjazev – Senior Procurement Officer

70% - Quality, Technical Capacity and Experience

- Understanding of project requirements
- Proposed research approach
- Proposed project team skills, capacity and quality assurance
- Relevant experience

10% Commercial Capability

- Will be measured against an assessment of the responses to the commercial questionnaire and we reserve the right to conduct a commercial financial check on all shortlisted organisations.

The commercial element will be undertaken by accessing the response to the tenderer's commercial capability and financial stability. We reserve the right to undertake a third-party credit check on all organisations participating in this tender. It will also be a requirement to take up references with other clients and we expect the tenderer to provide at least one reference who can provide a commercial reference.

20% Cost and Value for Money

- Submitted price and rate cards
- Added value – non-cashable and cashable benefits, e.g. discounts

Shortlisting Process

It is anticipated that the Charity will shortlist to a maximum of three Bidders who will be invited to discuss their proposals in more detail at a presentation/interview.

The date of the presentation is **9th October 2020**. It is recommended that Bidders ensure the availability of their key representatives on this date as once the date is confirmed, it cannot be changed.

The presentation will contribute to 50% of the technical and capability scoring.

On completion of the presentation, scores from all stages will then be combined and the highest scoring Bidder will be taken forward to contract award stage.

Timetable*

Activity	Date	Time
Issue of Brief	Tuesday 8 th September 2020	By 16:00 hrs
Submission of Questions Deadline	Friday 11 th September 2020	By 16:00 hrs
Responses to Questions	Wednesday 16 th September 2020	By 16:00 hrs
Submission of Notification of Intent (NOI) – Form A	Friday 18 th September 2020	By 16:00 hrs
Submission of Proposal including commercial questionnaire via the In-Tend portal. Form B Price Schedule	Friday 25 th September 2020	By 16:00 hrs
Evaluation of Returned Proposals	Not later than 1 st October 2020	By 16:00 hrs
Notification of Shortlist and issue of Presentation Brief	Thursday 1 st October 2020	By 16:00 hrs
Presentations**	Friday 9 th October 2020	
Final decision and notification of results	Friday 16 th October 2020	By 16:00 hrs
Contract Negotiation and Award	Not later than 23 rd October 2020	By 16:00 hrs
Contract Start Date	Tuesday 27 th October 2020	By 16:00 hrs

*The Charity reserves the right to amend this timetable as required throughout the procurement process.

**The date of the presentation is fixed and cannot be changed due to the availability of the evaluation team and resources required. Bidders are strongly advised to ensure the availability of their key stakeholders on this date as an alternative date cannot be accommodated.

Please note this will be via Teams of which you will receive an invite. Please advise in the proposal who is likely to be involved in this and their email address.

Appendices and Forms

Form A	Notification of Intent
Form B	Price Schedule
Appendix 1	Versus Arthritis Values & Behaviours Framework
Appendix 2	Terms and Conditions
Appendix 3	Supplier Expense Policy

