

Terms of Reference for UKIERI Impact Study

Background

The UK India Education Research Initiative (UKIERI) is a multi-stakeholder partnership programme led by the UK Government to enhance the educational links between India and the UK through developing and delivering projects that meet the priorities and needs of both countries. The programme began with Phase 1 in April 2006, ending in 2011. It was subsequently followed by Phase 2 which is due to end on 31 March 2016. The UKIERI programme is supported by both the UK and Indian Governments and Mutuality of benefit has been the core principle of partnerships supported under the programme. Since its establishment in 2006, UKIERI has supported over 1000 UK/India partnerships in education and research, and 25000 exchanges of academics, researchers, staff and students.

The aim of Phase 1 of the programme was to establish UKIERI as a framework to enable a step-change in the UK-India relationship on education and research. Phase 2 then narrowed the focus by working on thematic areas of national concern to both countries. It reached out to larger numbers and supported partnerships under four strands: leadership, innovation, skills development and mobility, with the aim to drive value through strategic and system driven projects.

Our aim for UKIERI Phase 3 is to build on the achievements of the previous two phases.

Context

The UKIERI Secretariat, acting on behalf of the UKIERI Governance Board wishes to commission a final evaluation and impact assessment of the UKIERI programme through the partnerships supported under UKIERI. This study will build on the mid-term evaluation carried out by Deloitte in 2014 and further elaborate on the outcomes of the projects. Deloitte study focused on primarily gathering evidence towards seeing if the programme is delivering value for money and is maximizing the effectiveness of the government funding for intended beneficiaries. The study aimed to inform policy development and program design, implementation and management. One of the key recommendations emerging from Deloitte study was the extension of UKIERI to Phase 3 which has been agreed by both the UK and Indian governments.

This Impact Study will provide the UKIERI Governance Board, together with key stakeholders in India and the UK, with specific success stories of what the programme has achieved through the partnerships facilitated, and provide a clear set of recommendations for the direction of further work (UKIERI Phase 3) in transforming the bilateral relationship across all parts of the education sector.

These TOR's therefore seek to appoint a specialist education evaluation supplier to assess the impact of the programme by analyzing the quality and impact of partnerships across phases one and two, and design an evaluation framework within which learning outcomes from a longitudinal engagement point of view can be demonstrated

Deliverables

The core deliverable for this study will be an overall programme impact assessment across a logically thematic landscape (geographical/subject and strand wise). The study should also identify case studies of the top 50 success stories across school(leadership), higher, vocational, technical education supported over the two phases. Minimum of one case study should be drawn from each of the four UK Home Nations and across all four strands. 3 unique exemplars should be identified for each aspect of engagement (detailed below) and where this is not possible, explanation as to why should be submitted to Secretariat prior to the submission of the draft report.

It will cover aspects of engagement including but not restricted to:

- Mobility - Number of exchanges including students, PhDs and faculty
- Publications, journals, media articles and other tools used for dissemination
- Leveraged funding, in-kind contributions and revenue generated
- Outputs including development of industry led training, curriculum development, commercial opportunities etc
- Integration with Industry and industrial engagement for commercialization of research, skilled training, Corporate Social Responsibility (CSR) etc
- Benefit accrued through UKIERI vis a vis other bilateral programmes
- Long term sustainability of benefits, partnership or a new endeavor from Phase 1 to 2
- Quantifiable outcomes to reflect return on investment in key aspects like policy intervention, systemic changes, geographical outreach, community engagement etc.

The study should provide clear recommendations with relevant appendices, a detachable executive summary and a set of slides summarizing the main highlights and recommendations.

Scope of work, specification and outputs

The supplier is required to design a benefits realization study to measure the outputs and assess the impact of the UKIERI phase 2 programme. This will include:

1. Working with experts to identify and finalize (after consultation with UKIERI Secretariat) learning, action and legacy outcomes, and to design associated measurable indicators for longitudinal impact studies
2. Developing a theory of change that clearly sets out the chain of outcomes and impact that has resulted from the partnerships and collaborations.
3. Develop a *success matrix* that allows for the benchmarking of success and the tracking of the journey of partnerships it has facilitated. It will allow UKIERI to easily demonstrate the learning journey and progress made by individual/groups of participants over time in terms of knowledge and skills development.
4. Identify successful partnerships using the benchmark developed and document 50 case studies from all the different thematic areas identified.

5. Design a longitudinal study evaluation framework and process, with specific approaches to evidence the longer-term impact of the partnerships. This will help inform communications to funders, policy makers and beneficiaries.

The preferred supplier will have in-depth knowledge and experience of the education sector in both UK and India. They will have a proven track record of monitoring and evaluation in the education sector, including Higher Education, Research and vocational education. Experience and track record should, as a minimum, be in both the UK and Indian markets. Wider international knowledge and experience is highly desirable.

As part of the initial briefing following contract award, the winning supplier will receive all project reports, partnership case studies and stakeholder inputs needed for the impact study only.

All costs incurred in the preparation of the proposal are the supplier's responsibility.

The UKIERI Secretariat reserves the right to request reference information and is not obliged to award a contract for these services. The UKIERI Secretariat reserves the right to withdraw from the procurement process at any stage.

Confidentiality

All information contained within this document is confidential and is provided only to give suppliers an adequate understanding of the British Council's requirements and under no circumstances should be disclosed to a third party without the British Council's consent.

The contents of these TOR's are being made available by UKIERI on condition that:

- Tenderers shall at all times treat the contents of the TOR's and any related documents (together called the 'Information') as confidential, save in so far as they are already in the public domain;
- Tenderers shall not disclose, copy, reproduce, distribute or pass any of the Information to any other person at any time;
- Tenderers shall not use any of the Information for any purpose other than for the purposes of submitting (or deciding whether to submit) a Tender; and
- Tenderers shall not undertake any publicity activity within any section of the media.

In relation to the above the definition of 'person' includes but is not limited to any person, firm, body or association, corporate or incorporate.

The UKIERI Secretariat may disclose detailed information relating to Tenders to its officers, employees, agents or advisers and may make any of the contractual documents available for private inspection by its officers, employees, agents or advisers. The UKIERI Secretariat also reserves the right to disseminate information that is materially relevant to the procurement to all Tenderers, even if the information has only been requested by one Tenderer, subject to the duty to protect each Tenderer's commercial confidentiality in relation to its Tender (unless there is a requirement for disclosure under the Freedom of Information Act).

Tender/Proposal Validity

Your response should remain open for acceptance for a period of 60 days. A response valid for a shorter period may be rejected.

Submission Details

Please submit your proposal on a maximum of 10 pages of A4 (excluding Annexures) under the following headings:

- Knowledge and Experience
- Approach and Methodology
- Costing and Budget Plans

Please include details of your team in an Annexure, including their expertise and contribution to the project. Provide precise details of how you would approach the research and report writing: what subjects you would cover, which sources you aim to quote, what data/information sources you would draw on to underpin your analysis, proposed interviewee list and how you would present the information to make the report clear and engaging for the reader. Include brief details of your previous track record that is of relevance to this task.

Please also provide details of the full cost associated with the provision of the service in pounds. We expect 45 days maximum for completion of this study. Provide a full breakdown of your daily rate(s) and number of days proposed for each of the elements of the tasks to be delivered.

Please provide full contact details.

Evaluation Criterion

Supplier responses will be assessed using the following criteria and weightings.

Criteria	Weightage
Section 1 - Knowledge and Experience <ul style="list-style-type: none">• Has a proven track record both as a company and as individuals in international education and internationally/regionally on similarly large-scale projects• Has existing expertise and understanding of UK/India education and presence in UK and/or India	40%
Section 2 - Approach and Methodology <ul style="list-style-type: none">• Has worked to high quality standards involving working in teams with appropriate roles and IT support (online surveys etc), dealing with contracts and to deadlines• Can assimilate the requirements easily	40%

<ul style="list-style-type: none"> • Provide innovative approach through similar commissions or benchmarking with similar organizations • Detailed work plan and milestones 	
Section 3 – Costing and Budget Plans	20%
<ul style="list-style-type: none"> • Is good value for money 	

Evaluation of submitted responses will be undertaken by an evaluation panel. This will consist of representatives from both the UK and Indian agencies with significant experience and knowledge of the requirements. The qualitative aspects of your response will be evaluated entirely on the response submitted and only consider information presented within the response. Any previous experience must be clearly evidenced within the response.

The responses under each sub category will evaluate the following

- Has a proven track record both as a company and as individuals in international education and internationally/regionally on similarly large-scale projects
- Has existing expertise and understanding of UK/India education and presence in UK and/or India
- Has worked to high quality standards involving working in teams with appropriate roles and IT support (online surveys etc), dealing with contracts and to deadlines
- Can assimilate the requirements easily
- Is good value for money
- Provide innovative approach through similar commissions or benchmarking with similar organizations

The scores will be based on the following matrix:

Points	Interpretation
10	Excellent - A comprehensive and strong answer indicating the provider is fully capable and experienced to deliver the required outcomes. A detailed response that directly responds to all requirements with no ambiguity and relevant examples provided.
7	Good - There are slight concerns that the organisation will not be able to achieve all the outcomes required and response lacked details of relevant experience. A less detailed response that broadly responds to the requirement with some ambiguity and few relevant examples provided.
5	Adequate - There are concerns that the organisation will not be able to achieve the outcomes required and response significantly lacks details of relevant experience. A less detailed response that broadly responds to the requirement with some ambiguity and no/irrelevant examples provided.

3	Poor Response/Limited Evidence - There are serious indications that the organisation will not be able to achieve the outcomes required and has not provided appropriate evidence of experience to successfully deliver the outcomes required. A response that is not entirely relevant to the requirement, with ambiguity and lacking specific detail.
0	Unacceptable - The answer is non-compliant and/or no relevant information has been received to demonstrate the organisation can achieve the required outcomes. No response or a response that is entirely irrelevant.

The panel appointed to evaluate the bids will individually score all responses received. Each score will then have the relevant weighting applied. The mean average of the weighted scores awarded by each member of the evaluation panel will then be calculated.

The mean average scores after the weighting has been applied, will be added together to produce an overall total score.

The successful tender will be the tender with the highest score awarded at the end of the evaluation process outlined in these TOR's.

Timescales

Activity	Date
TOR's Released	16/06/2015
Clarification / Questions from Suppliers	22/06/2015
Clarification Responses from UKIERI	25/06/2015
TOR's Return Date	15/07/2015
Evaluation	16/07/2015 – 26/07/2015
Notification of Preferred Supplier	30/07/2015
Contract Start Date	10/08/2015
Draft Report	05/10/2015
Final Report	30/10/2015

Given the relatively short time scale we expect the contracting process to be completed as soon as possible after the notification to bidders so that work may begin at the earliest opportunity. Interim findings are required to be submitted at a mid-point to be agreed with the eventual contractor and the final version to be delivered to the UKIERI Secretariat no later than Monday, 30 October 2015.

Any questions about the requirements should be mailed to ukieri@britishcouncil.org

Instructions for Responding

Please submit your proposals to ukieri@britishcouncil.org no later than 15/07/2015, 17:00 GMT.

The following key points must be considered when responding to these TOR's:

- Please ensure that you send your submission in good time to prevent issues with technology – late submissions may not be considered.
- Do not submit any additional documentation with your TOR's response except where specifically requested.
- Supporting evidence (PDF, JPG, PPT, Word and Excel formats only - other formats should not be used) can be provided to substantiate your response – please ensure that all attachments/supporting evidence is clearly labelled with the appropriate question number.
- Any supporting marketing materials should be provided separately to the main TOR's response. All the references to such marketing content should be explicitly annotated in the TOR's response.
- It is not acceptable to submit a generic policy in answer to a question. If you submit a generic policy you must indicate the page and paragraph reference to the appropriate content.
- All answers in the TOR's response should be inserted in the space below the requirement / question.
- Where supporting evidence is requested as 'or equivalent' – it is the Tenderer's responsibility to prove the relevant equivalence.
- Any alteration to a question will invalidate your response to that question and a mark of zero will be applied.
- Completion and submission of your response does not guarantee award of any contract.
- Please ensure that your responses are concise, unambiguous, and directly address the requirement stated or question posed.
- All costs incurred in the preparation of the bid are the suppliers' responsibility.
- The contents of these TOR's are confidential and are not to be disclosed to any third party.

Clarification Questions

Any questions should be submitted via email to ukieri@britishcouncil.org no later than 22/06/2015, 17:00.