



**Call for Proposals**  
**Grant administration services**  
**April 2018**

**Introduction:**

As part of piloting its new approach to delivering capacity building programmes Access is seeking an organisation to manage c. £2m of grants to charities and social enterprises, predominately working in the homelessness and youth sectors, to support the development of enterprise activity and therefore increase the likelihood that those organisations will be able to utilise social investment.

This call for proposals should be read in conjunction with Access's strategy for 2018-23 which has recently been published on the Access website. The strategy contains essential information regarding Access's role, the context for the programme, the products which we seek to test, the way the different elements of our enterprise support offer will fit together, and how we hope the programme will evolve. In responding to this call for proposals you should pay particular attention to the section under the heading Theme One: Enterprise Development which is on pages 16-21: <https://access-socialinvestment.org.uk/wp-content/uploads/2018/03/Strategic-Plan-2018-23-final.pdf>

Additional information is also available elsewhere on the Access website: <https://access-socialinvestment.org.uk/enterprise-development/>

In developing the model of support outlined in the strategy, we wish to pilot our approach over the next year. This call for proposals therefore is for an initial period of one year. Subject to relevant procurement arrangements this work may be extended beyond that period.

**Grant products:**

This call for proposals is to deliver the feasibility grants and enterprise development grants, first mentioned on page 18 of the strategy.

We are seeking to spend up to £2m over the next year on these grant programmes.

Feasibility grants are small grants of around £5,000-£10,000, principally for internal capacity, will be provided for organisations to investigate and develop an enterprise proposition from the very earliest stage into a proposed delivery plan. The objective of the grant is for charities and social enterprises to be better informed about their options in developing enterprising activities and earned income, test the viability of

specific propositions and to develop clear implementable actions plans for establishing such activity.

Enterprise Development grants are more substantial grants of c. £50k (but flexible responding to need), available for organisations which have an enterprise proposition which requires further development or scaling and where there is a potential requirement for investment. These grants will be spent on a mixture of internal capacity and external expertise, to develop, test and refine a proposition. They may also directly fund the starting or growing of trading activities. The objective of the grant is to support charities and social enterprises to significantly increase their potential to generate earned income through trading or other enterprising activity, and to better understand the role that repayable finance might play as a catalyst to further stimulate the growth of earned income.

We envisage around 30% of the budget being spent on feasibility grants and around 70% of the budget on enterprise development grants, but this proportion should be flexible and respond to demand.

As defined in the strategy, the focus on grant making should be in the homelessness and youth sectors, with an envisaged 50/50 split between the two. However, where relevant to further developing learning and feedback about the enterprise development approach, grants may be made to other charities and social enterprises outside those sectors.

### **An ecosystem of support:**

These grant products are one part of the broader ecosystem of support, as outlined in the strategy. Navigation for charities and social enterprises throughout that ecosystem will be essential. In your response you should set out, based on your knowledge of the market, how you would plan to support that navigation and joining up of support across the different elements of Access's work and beyond too to other sources of support for charities and social enterprises. In particular your response should outline how you would feed into work being undertaken to:

- Develop shared diagnostics for the sector;
- Build a clearer knowledge base about the enterprise models which are working in each of the two chosen sub-sectors; and
- Support peer learning opportunities to broaden experience and knowledge of enterprise models and activity.

Access will work closely with lead representative bodies in each of the Homelessness and Youth sectors. These partners will support the design of various elements of the broader programme, including the grant products, will provide peer learning opportunities, and will help market support and grants through their networks. You will be expected to work closely with these sector specialist networks in the design and delivery of the programme.

## **The specification:**

Access is seeking a grant administrator to undertake the following roles:

- Refine the design of the grant products, based on existing knowledge of the market and of what works. This should be done in close partnership with the sector specialist networks with whom Access will be working.
- Design and deliver appropriate marketing strategies, again in partnership with sector specialist networks, and which are consistent with the messaging around enterprise development for resilience which is at the heart of Access's new strategy.
- Manage the end to end customer journey for applicants, setting clear expectations about timescales and the work involved.
- Design and provide a simple and proportionate online application process for each grant product, integrated with work funded by Access to develop common diagnostics, and with support from Access's learning partner, which allows for simple integrated data collection and processing.
- Develop and operate a proportionate and robust decision making process for each grant product, minimising turnaround times for decisions and setting clear expectations for applicants.
- For unsuccessful applicants, provide feedback on how their application can be improved.
- For successful applicants, undertake appropriate due diligence checks to ensure appropriate use of public money, and provide relevant grant documentation for the charity to sign, establishing necessary milestones and with clear reporting requirements.
- Manage payment processes of grants in tranches as appropriate to grantees. Draw downs from Access would be made against a quarterly forecast of expected grants to be made to grantees.
- Gather monitoring information and data from grantees to ensure compliance with grant terms and conditions and to facilitate learning about the programme, and make this information and data available to Access and our learning partner.
- Make data and information about the performance of the grant programme available to be published.
- Ensure adherence to all relevant laws, regulations (including State Aid), requirements upon Access (as per our grant agreement with DCMS) and best practice for grant making.
- Ensure high levels of customer service and respond to feedback from charities and social enterprises, as well as other stakeholders, about the programme.

## **Your response:**

To respond to this call for proposals, please provide a proposal of how you would deliver the required specification against the broader aims of Access and the new enterprise development programme. This should be no more than 20 pages long. In your response you should specifically address:

- How you will best achieve the aims of the wider programme, including expanding the reach of support and social investment to organisations who have not benefitted from it before, and how you will bring your track record, knowledge and experience to bear on the design and delivery of the grant programme.
- Your initial thoughts on the design of the grant products themselves; how charities and social enterprises should best be supported to use the grant products to achieve the best outcomes, and the role of advisory providers.
- Your proposed approach for making data and learning useful and available to Access, our learning partners, and the wider sector.
- How you will embed the grant programme in the wider ecosystem of support, and how you best see the enterprise support programme evolving over time, given the reference to the future role of a “enterprise support function” as outlined in the diagram on page 21 of the Access strategy.

**Price:**

Please provide a price for the maximum £2m budget to be delivered within a year. The administration costs of the programme should be dedicated from the total available for making grants. While grant should be made within a 12 month period, the necessary grant monitoring and data gathering may continue beyond that 12 month period and should be costed.

Please outline any VAT which may be payable clearly and separately.

Given potential flexibility in the budget please also provide details of how the administration costs would reduce in line with a reduction in the grant budget, and implications of an increase in the grant budget.

**Assessment criteria:**

Your proposal will be scored against the following weighting

Criteria	Scoring
Demonstrating understanding of Access's role, and aims of the enterprise development programme and the role of the grant programme within that	10
Track record of running similar programmes and evidence of robust systems and processes for managing grant programmes and associated risks	30
Added value, and creative ideas about how the programme can best operate	10
Knowledge and experience of key staff	20
Price	30

To respond please email a proposal of no more than 20 pages to [applications@access-si.org.uk](mailto:applications@access-si.org.uk) by noon on 8 May 2018.