

INVITATION TO QUOTE

Growing the Community Business Network UK-wide: Understanding the “cold spot” areas where Plunkett Foundation supports fewer community businesses

Plunkett Foundation is funding an initial piece of research with a maximum budget of **£10,000 including VAT**. We are seeking a fixed price quotation for the requirements set out below. Please show a breakdown of costs as detailed below. No costs other than those shown in the quotation will apply.

There is potential for this commission to be extended to a more in depth Phase 2 but Plunkett Foundation is currently awaiting the response from an external funding body to support this work.

The completed proposal should be submitted to Chris Cowcher, Head of Policy and Communications via chris.cowcher@plunkett.co.uk, please put in the email header “Confidential - Research Tender”.

Introduction to the tender

Plunkett Foundation is preparing for a new strategy covering the period 2022 to 2026. Our ongoing central mission is to support more communities to utilise community-ownership as an effective way to improve, maintain and manage local assets, businesses and services.

To ensure that the advice, support and services offered by Plunkett Foundation are reaching all parts of the UK we are inviting tenders for a piece of research which identifies and reviews the reasons for “cold spots”. These are areas where the Plunkett Foundation has or is currently supporting fewer community businesses than might be expected. The research will help to determine:

- a) The reasons for these apparent “cold spots”, and
- b) The implications for the delivery of the Plunkett Foundation’s services in these areas.

This Invitation to Quote (the "ITQ") covers:

- Background to the Plunkett Foundation
- The background to this commission;
- Specifies the services and outputs to be delivered; and
- Provides the details of the competition being conducted by the Plunkett Foundation to select a supplier to enter into a contract for the provision of the Requirements.

In this ITQ, references to the "Tenderer" are to the company, partnership, individual or other legal entity which, in response to this ITQ, prepares and submits a tender to the Plunkett Foundation in accordance with this ITQ. That tender is referred to in this ITQ as the "Tender".

Introduction to the Plunkett Foundation

Plunkett Foundation is a national charity, working across the UK to provide access to advice and expertise for the benefit of community businesses. We have been helping communities, predominantly in rural areas, for over 100 years to create innovative, impactful and inclusive places, through promoting and supporting community ownership of assets and services.

The businesses we work with are owned and run democratically by members of the community on behalf of the community. They include shops, pubs, farms, woodlands, food and drink producers and other multi-service hubs. Plunkett Foundation has or currently supports over 1,300 community businesses – 800 that are trading¹, and a further 500 that are in the process of setting up. Of the 800 trading community business with whom Plunkett has worked around 700 are in rural areas.

Plunkett Foundation advocates for community ownership as a solution to multiple rural issues; from ongoing closures of local services such as the shop and the pub; the withdrawal of public services including transport and healthcare; through to declining employment and social opportunities for local people. We promote community business as an opportunity that can proactively support communities to create inclusive, impactful spaces.

We do this by providing a comprehensive service including:

- a dedicated staffed advice line;
- a UK-wide network of around 50 self-employed specialist business advisers, community ownership experts and mentors;
- facilitated study visits to inspiring examples of community businesses;
- a comprehensive suite of online tools and resources;
- networking events and training; and
- purchasing benefits through membership.

Plunkett Foundation is known for its specialist advice on legal structures, business planning and raising finance through community shares. We're proud to champion the fact that the businesses we have supported to open have a 96% long term survival rate.

We aim to help all communities who contact us, but as a charity, we specifically seek to support communities that are aiming to use a community business approach to alleviate poverty and address social exclusion and isolation.

Background to the research

One of the objectives of our existing strategy is to “*extend our relevance and reach: ensuring the community business model and the support available are relevant and accessible to communities in all parts of the UK*”. This is likely to remain a key objective of our updated strategy. The Foundation is therefore keen to understand the nature of these cold spots, the reasons for them and what we can do to address these reasons.

There are two types of apparent **cold spots** – areas of the UK where there are fewer community business in rural areas, or at least fewer businesses with whom Plunkett has or does engage:

¹ This is not the whole population of community businesses in the UK, rather the ones with whom we have worked or are working with and that are recorded in our CRM system (Salesforce)

- First, outside England in the **devolved nations**. At present only 16% of the community businesses supported by Plunkett Foundation operate outside of England (and 17% of rural businesses). This compares to the 21% of rural population in the UK outside England (in 2011).
- Second, **within England**, our review to date of Plunkett's reach indicates that there are regions with a lower uptake on our services and where there are fewer community businesses supported by the Foundation relative to the size of the rural population. There is strong clustering of community businesses associated with Plunkett relative to rural population in the South West and South East and the East of England and a weaker presence in the East Midlands and North East.

To support the research Plunkett will provide access to our CRM (Salesforce) data and will support the researcher through interviews and introduction partner organisations. The researcher will also be able to utilise space to work from within the Plunkett offices, in Woodstock, Oxfordshire.

Research objectives:

This research aims to articulate the reasons behind the regional and country variances in the number of community businesses and to help Plunkett Foundation to consider what measures and actions could be included in the organisations 2022-2026 future strategy to create more community businesses UK-wide.

We expect the research to explore a number of possible reasons and the relative importance of these to explain cold spots. At present the Foundation is aware of the following possible explanations (this is not a definitive list and there may be others):

- 1) The **size and nature of rural populations** in different parts of the UK (including the spread of rural population in smaller towns and villages where community businesses appear more likely to be set up and proper)
- 2) The **capabilities, assets and resources of rural communities** in different parts of the UK (including income, wealth levels and local skills and experience)
- 3) The **awareness** of the community business model as a possible solution (including the proximity to other successful community businesses)
- 4) The extent to which there are **other types of local organisations**, that are not community businesses, that may be providing solutions to rural community's needs (eg social clubs etc)
- 5) The extent to which there are other organisations, other than Plunkett, providing **effective support** to local communities (especially in the Devolved Nations, but also some parts of England)

It is intended that this work will be completed over two phases, with the initial phase and primary focus of this commission predominantly covering a comprehensive review of the data already held by Plunkett, investigating in greater depth the already apparent "cold spot" areas and improve our understanding of the opportunities or challenges that exist in these areas. The phase 1 research will contribute significantly to the understanding of Plunkett's relationship in the "cold spot" areas and articulate the role of other organisations and

infrastructure that a providing advice and support in these areas. It will also help to consider how the commission can grow and potentially change in phase 2.

The specific research objectives of Phase 1 of research are:

- 1) To define **different ways of measuring** what are cold spots (that would use different indicators of the potential level of community businesses per head of rural population etc) and advise on the most appropriate measures.
- 2) To identify and map out precisely the **current location** of the “cold spots” (using the different definitions) and how intense these are (this would look at regions, nations and within England county areas)
- 3) A review and synthesise of the evidence on the **reasons** for these cold spots (which we would expect to vary by area and between England and the rest of the UK)
- 4) To map the **alternative support** currently available in the cold spot area (in Devolved Nations and part of England)
- 5) To assess the extent to whether **alternatives to community business** (or community-led action) exist in these “cold spot” areas
- 6) To provide an initial assessment of the needs of communities in cold spot areas
- 7) To provide initial insights into the implications for the design and delivery of Plunkett’s services

The intention of the second phase of the work, which will be commissioned should Plunkett be successful in securing additional extra funding, will help to define the solutions to addressing the “cold spots”. This will including advising on new collaborations, partnership and helping to identify priority areas to be addressed in Plunkett’s future strategy.

Method

Tenderers should suggest the most appropriate method for the commission, but we expect that this might include:

- desk review of the Plunkett-held data relating to the different models and variations of community business that exist and identify the “cold spots”
- interviews with Plunkett staff
- use of comparative data (eg from the 2011 Census on the size and number of rural communities and rural populations and on the incomes, skills and capacities of rural communities)
- review of existing relevant research on capacity, gaps and needs for communities
- consultations with other existing infrastructure providers which support rural communities
- identification of gaps in support provision or potential for duplication
- mapping of community organisations or other forms of social infrastructure that are not recognised as community businesses
- consider current funding programmes available to support community-led projects in the “cold spot” areas

Timescales

The evidence provided by this review will help to inform Plunkett’s new 2022-2026 Strategy which will be launched next year. As such this work will need to be completed by January 2022, with an Interim report or update presented to the Plunkett Foundation in December 2021.

The following timescales are proposed for the work:

ITQ issued	22 September 2021
Closing date for questions regarding the ITQ	2 October 2021
Closing date for tender submissions	20 October 2021
Interviews	w/c 25 October 2021
Contract awarded	w/c 1 November 2021
Inception meeting	8 November 2021
Interim report (to include definition of the “cold spot” areas) & a meeting with Plunkett Foundation	10 December 2021
Final report	28 January 2022

Expected Outputs

Outputs from this review should be appropriate to achieving the objectives and methods set out above.

The final report should contain (as a minimum):

- an Executive Summary;
- overall findings of the review, assessment of need and identification of “cold spot” areas.
- opportunities and potential challenges for community-led action and community-ownership projects seeking to access Plunkett services
- recommendations for appropriate level of Plunkett involvement and service provision in the “cold spot” areas
- recommendations for how Plunkett Foundation should operate in partnership and collaborate with other infrastructure bodies

Tender Submissions

Tenderers should prepare a proposal outlining the following:

- proposed approach to the work including a detailed timetable;
- relevant skills and details or previous experience of similar work;
- members of the consultant team and their relevant skills and experience, if relevant;
- approach to quality management;
- professional fees for completing the work and any relevant expenses, Pricing should be provided as a daily rate with expenses;
- details of GDPR, equality and diversity and sustainability policies.

Selection Criteria

Tenders received by the closing date will be assessed according to the following criteria:

- scope, relevance and originality of the proposed methodology;
- skills and experience of the proposed research team;
- quality and appropriateness of proposed outputs;
- ethical standards and quality assurance processes; and
- cost of proposed research.

Instructions for Tenderers

Informal enquiries regarding this research can be addressed to Chris Cowcher, Head of Policy (chris.cowcher@plunkett.co.uk).

Deadline for responses which should be received by email, 12.00pm, Wednesday 20 October 2021 to Chris Cowcher, Head of Policy (chris.cowcher@plunkett.co.uk).