

REQUEST FOR OFFER AND TERMS OF DELIVERY

Diaconia University of Applied Sciences

Erasmus+ funded project, Alliance Fostering Skills Development for Social Economy - European Social Innovation Campus (ESIC)

External Developmental Evaluator

Evaluation of the project
European Social Innovation Campus (ESIC)

The Erasmus+ funded project Alliance Fostering Skills Development for Social Economy

Diaconia University of Applied Sciences is opening a call of tender for the Erasmus+ funded project

Alliance Fostering Skills Development for Social Economy - European Social Innovation Campus (ESIC) for an

External Developmental Evaluator

Joining the Pact for Skills on Proximity and Social Economy, the European Social Innovation Campus (ESIC) contributes to the challenge of the upskilling and reskilling of 5% of the workforce and entrepreneurs of the sector each year to tackle the green and digital transitions in the social economy by boosting social innovation capacities. The Alliance brings together higher education and vocational education and training, social economy organisations and enterprises from several European countries and European-level actors.

Drawing on evidence regarding the skills needs of occupational profiles, the Alliance boosts the provision of new skills. It addresses skills mismatches by creating a new general Core Curriculum for the social economy and curricula for different EQF levels. The Alliance designs and delivers transnational education and training content and co-produces teaching and training methodologies for quick uptake of the content at regional and local levels and emerging occupational profiles. In addition, the project will establish a strong communication and dissemination network, promoting the social economy sector as a career choice and supporting the development of a sense of initiative and entrepreneurial mindsets in the EU.

The Alliance will establish and maintain the European Social Innovation Campus platform that distributes project results (target number of visitors: 10,000). The dynamic Skills Monitor integrated into the platform will host skills intelligence data in an open format accessible to all stakeholders and researchers. Events, meetings, and co-creation will integrate diverse actors into the process and help to disseminate its results. The target number of organisations in the research and local stakeholder committees is +70, the number of learners in the training programmes pilots is +375, and the number of people attending the dissemination events is +500.

The selected *External Developmental Evaluator* will join Work Package 6 of the project: Developmental Evaluation & Quality Assurance. WP6 is dedicated to the continuous developmental evaluation of the project, evaluating quality and, ultimately, assessing the project, lasting for the entire project and accompanying all project activities (48 months, starting September 2023).

The objectives of the WP6 and, therefore, the required qualifications for the selected External Developmental Evaluator are:

- To ensure that the project is being managed and deployed in a sound, reasonable way;
- To ensure that the project's results are of high quality and relevant to the project target group;
- To ensure the transparency of the whole implementation process;
- Support, facilitate, and participate in the co-designing project process and its outcomes (developmental evaluation).

The selected External Development Evaluator will support, facilitate, and take part in co-designing the project process and its outcomes. The goal of Quality Assurance performed by the External Development Evaluator is to capture the project's status according to the stakeholders' views, including policymakers, and support corrective actions if needed to maximise the impact.

A Quality Manual outlining project implementation principles will be co-written by the External Developmental Evaluator and the Project Coordinator (Diak), with all partners' input. The first version is due in M2 (October 2023), and it will be revised on a bi-annual basis. The manual is crucial to ensure the project moves in the right direction.

The External Developmental Evaluator will carry out bi-annual evaluations. The evaluations will analyse evidence of impact and sustainability, efficiency and effectiveness and suggest improvements to be discussed in the next transnational project meetings. In this way, the External Developmental Evaluator contributes to the ongoing designing of the project process and its results. (Bi-annual online meetings will occur as follows: March 2024, September 2024, March 2025, September 2025, March 2026, September 2026, March 2027 and September 2027.)

The project's final evaluation will be summative and assess impact and sustainability. The External Developmental Evaluator will carry it out. It will be facilitated mainly by Partner Representatives (PR) from each partner and the Project Coordinator (PC). Its results will be published in the project closing meeting in Romania. The results will be part of the final report to the European Commission.

Summary of the deliverables:

- Quality manual (due date M2)
- Bi-annual evaluation reports
- External evaluation reports (two External Evaluation Reports will be elaborated by the External Developmental Evaluator: one in the middle and one at the end of the project through the analysis of the overall project implementation)
- Final Evaluation Report (due date M48)

Required qualifications:

- Professional experience in the developmental evaluation of projects funded by the European Commission;
- Knowledge of social innovations;
- Knowledge of service design;
- Knowledge of higher education and online learning
- Fluent English

The proposal should include the following elements:

1. Approach to the evaluation and description of the methodology;
2. Work plan including an estimation of the working days;
3. A short description of the evaluator's expertise related to this evaluation task (including references, preferably three);
4. Price per working day and the total price of the evaluation.
5. Name and contact details of the evaluator;
6. CV of the evaluator (and the other team members if there is a team).

We would like you to include in your offer the following meeting (including travel and accommodation) costs:

- ~~— Kick-off meeting in Helsinki & Tallinn, M1 – September 2023~~
- Project meeting in Brussels, M9 - May 2024
- Project meeting in Spain, M17 - January 2025
- Project meeting in Dublin, M25 - September 2025
- Project meeting in Trento, M33 - May 2026
- Project meeting in Romania, M41 - January 2027
- Project meeting in Hague, M48 - August 2027

Our project is a so-called lump sum project, so we have not calculated/granted working days for external experts. However, we aim to open up the scope of the work through the necessary outputs and, for example, participation in meetings and travel days. Based on this, we evaluated the maximum sum of around 40k€ for four years.

The maximum length of the proposal is three pages + the CV and references.

The contract will be awarded to the most favourable proposal assessed based on the qualification mentioned above criteria, as well as the content and implementation plan of the proposal. *Diaconia University of Applied Sciences reserves the right to purchase additional services from a service provider of our choice.*

Schedule for the open tender:

- **Publication of the open tender: October 5th.**
- During the open tender period, the deadline for sending additional questions is October 10th.
- **Submission date DL offers October 17th.**
- Eligibility evaluation of offers and investigation of backgrounds: October 19th.
- Possible additional questions for journalists: October 18th and going through them on October 19th.
- Comparison of offers and procurement decision-making and informing suppliers: October 23rd.
- Contract negotiations and conclusion of the contract with the selected supplier: week starting October 23rd.
- **Start of the cooperation on October 26th.**

The proposal and questions should be emailed to kirjaamo@diak.fi within this timeframe.

Publication of the open tender: October 5th.

The deadline for sending additional questions during the open tender period is October 10th.

The submission date DL offers is October 17th.

Further information on the evaluation is available in the Terms of Reference (below).

TERMS OF REFERENCE

1. Background and rationale of the project

The New Industrial Strategy for Europe (2020) identified 14 key industrial ecosystems, naming Proximity and Social Economy as one. Social economy and social innovations are sought to contribute to making societies more inclusive, creative and sustainable while addressing environmental challenges. In the face of recent crises, including the social and economic consequences of COVID-19, social economy organisations have demonstrated a remarkable ability to contribute to the strengthening and building of resilient communities. At this very moment, the war in Ukraine reminds us of the importance of peace and cohesive, democratic societies. Social economy organisations across Europe have quickly mobilised to find innovative ways to provide food, shelter and basic needs to those fleeing the affected areas.

The European social economy represents 2.8 million organisations and over 13.6 million paid jobs, i.e. 6.3% of the working population. Paid employment in the social economy varies between 0.6% and 9.9% of all jobs amongst Member States, meaning there is significant untapped economic potential in job creation. Social economy organisations can play an essential role in creating new social innovations, fostering economic activity and the inclusion of vulnerable groups through good practices in employment, training and education, services and accessibility.

The main limitations of social economy organisations have been identified as:

- a limited degree of visibility and recognition,
- a limited capacity to access resources and public procurement,
- a limited ability to scale up social innovation,
- an inadequate use of the existing skills development opportunities,
- a lack of sufficient research focused on social economy and social enterprises.

To answer these challenges, fostering social entrepreneurship, particularly among young entrepreneurs, and facilitating the creation, scaling up and replicating social innovation will be critical. To unlock the sector's potential, the Commission has prepared a new European Action Plan for Social Economy, adopted in December 2021.

The OECD's recent Recommendation 0472 (published in June 2022) identifies nine building blocks that provide the conditions for the social economy to thrive at international, national and local levels: 1) social economy culture; 2) institutional frameworks; 3) legal and regulatory frameworks; 4) access to finance; 5) access to markets; 6) skills and business development support; 7) managing, measuring and reporting impact; 8) data; and 9) social innovation.

The Alliance contributes to blocks 6 and 9 by strengthening skills and business development support within the social economy and encouraging social innovation by promoting social innovation through training and collaboration with VETs and HEs.

A social enterprise is an operator in the social economy whose main objective is to have a social impact rather than to make a profit for its owners or shareholders. Social enterprises and other social economy organisations have significant potential for social innovations. Social innovation is developing and implementing new ideas—products, services, and models—to meet social needs and create new social relationships or collaborations (European Commission, 2013).

Social innovation cannot merely be seen in light of its innovative outcome. Engagement in social innovation must include a critical concern for the process leading to the creative outcome; social innovation is sociable both in its means and its ends. Social innovation requires multidisciplinary skills and competence: handling,

managing and measuring social processes, producing, piloting, scaling, implementing, controlling and more. In social innovation processes, social entrepreneurship plays a role in commercial markets, civil society, inside existing public services or in hybrid combinations. It is only when this agency is materialised as an autonomous economic organisation that the term social enterprise covers it. These insights will be taken into consideration in this project.

Social innovations will be fostered by identifying vital elements of innovation ecosystems. Particular emphasis will be given to topics of management and organisational solutions that support innovations. Attention will also be paid to multi-sectoral and multi-professional co-creation because innovations often entail crossing disciplinary borders and observing things from new perspectives.

The ability of social economy organisations to identify emerging needs and to develop appropriate answers is due in large part to the multi-stakeholder nature of these organisations, which often involve their workers, clients and volunteers, ensuring that the new services that are developed and delivered are closer to the needs of local communities. Due to their closeness to the users and the local context, social enterprises are ideally positioned to intercept emerging societal needs and develop innovative responses to such conditions. The social mission of these organisations, combined with their entrepreneurial nature, ensures that the innovations they engage in address social issues.

Historically, many mainstream welfare services of today are examples of social innovation initiatives that once started within the realm of the social economy, and the same thing is happening now concerning new sectors of activity, such as education, renewable energy or the integration of migrants. Many social enterprises work to achieve systemic change by introducing new business models, changing value chains, activating unused talents, and exploiting unused resources.

To unlock the potential of social innovation in social economy organisations, skills development for management, collaboration, entrepreneurship, and innovation are required. This project investigates new sets of skills in the social economy and, together with social economy actors and educational actors, develops unique educational contents and methods for skills enhancement. (See The Lisbon Declaration (2018) for learning about social innovation methods and principles, career coaching and support.).

Key activities of the project include:

1. Skills intelligence
 - a. In co-creation with social economy organisations and other relevant stakeholders, including the business community and public sector, identify emerging occupational profiles;
 - b. Mapping skills and educational needs in the social economy sector, including digital and green skills;
 - c. Develop a methodology for continuously anticipating future skills needs, monitoring progress and the evolution of the demand and supply of skills, and establishing an annual Social Economy Skills monitor.
2. Development of a sectoral skills strategy and European sector-wide 'core' curricula and training programmes on social enterprise management and innovations (EFQ levels 3-8)
 - a. Based on the results of the Skills intelligence, developing a skills strategy for the social economy sector, including priorities for actions to support the objectives of re- and upskilling the workforce;
 - b. Creation of core curricula for VETs and HEIs to develop and provide training and qualifications on social economy and occupational profiles;
 - c. Create qualification frameworks that allow the identification and acknowledgement of learning acquired in various ways and environments.
3. Designing and delivering continuing vocational training programmes to address urgent skills needs, including co-creation in quadruple helix solutions
 - a. Upskilling and re-skilling training of trainer programmes (EFQ levels 6-7);

- b. Flexible learning models in different stages of life, as well as work-based learning and apprenticeships (EFQ levels 3-5);
 - c. Incubation and acceleration programme for social enterprises;
 - d. Models for enterprise and employment guidance and support services in social economy;
 - e. PhD Summer School (EQF level 8).
4. Communication and outreach
- a. Establishing an online platform, European Social Innovation Campus, for dissemination and open access to educational resources produced by this project;
 - b. Engage stakeholders and policymakers as supporters and users of the online platform;
 - c. Increase the recognition of the social economy and attractiveness of the sector as a career choice among students.

2. Purpose of the evaluation

The External Developmental Evaluator has a crucial role in the quality assurance of the project, as it will be responsible for the evaluation activities throughout the project based on developmental evaluation methods.

In Developmental Evaluation, the evaluator does not just assess the attainment of final project objectives but also assists in producing project results. The Developmental Evaluator functions as co-designer of the project process, bringing an external perspective and insights into the project process. For instance, while producing the core curriculum in project workshops, the External Evaluator takes part in designing the form of the final version of the curriculum.

Quality control at the project level focuses on ensuring that the goals, activities, and outcomes consistently align with Erasmus+ regulations and wider EU and national development and education policies. The stakeholder groups and final beneficiaries must fully participate in the project's activities. Quality control further focuses on attentive and competent project management, prudence, and an ability to prioritise effectively in times of difficulties or potential conflicts.

A Quality Manual (outcome 6.1) will be co-written by the Quality WP6 lead (Diak) with the External Developmental Evaluator and with input from all partners. The first version is due within M2, and a revised version will be published in M4. The manual is crucial to ensure the project achieves the desired quality level. It includes templates that standardise communication and monitoring. Questions will address, e.g., to what extent the activities and results meet the expectations of stakeholders and beneficiaries.

An evaluation package will be designed by the External Developmental Evaluator in WP6. It is to be applied in all project activities. The mid-term evaluation is carried out by the External Developmental Evaluator in WP6. It analyses evidence of impact and sustainability, efficiency, and effectiveness and suggests improvements to be discussed in the next transnational project meeting.

The final evaluation of the project will summarise and assess impact and sustainability. It is carried out by the External Developmental Evaluator. It will be facilitated mainly by the Project Board in WP6. Its results are published in the project closing meeting. The results will be part of the final report.

Methods and indicators (quantitative and qualitative) to monitor and verify the outreach and coverage of the activities and results

At the beginning of the project, the External Developmental Evaluator will develop an internal evaluation package, including an Evaluation Plan (EP) that will be the reference point for all project partners, who will carry out continuous monitoring and evaluation of the project. The main aim of the evaluation is to assess whether the project achieves its objectives and impacts. The EP will define several key performance indicators (KPIs) to do this. In the evaluation, special attention will be paid to:

- How the target groups have benefited from the project activities;
- Whether the project's expected results and impact on beneficiaries have been achieved;
- What skills the beneficiaries have developed through participation in project activities;
- What are the partners' capacities to multiply project outcomes and achieve sustainable and transferable results?

WP	Indicator / unit of measurement	Baseline	Target values
1	Number of transnational project meetings implemented	N/A	7
3	Number of organizations in the research committees	N/A	30
3	Number of organizations in the local stakeholder committees	N/A	40
4	Number of learners in the training programme pilots	N/A	In total 375(?)learners: 70 trainers to be trained 120 learners in flex. Programs 100 trained guidance and counseling professionals 50 learners in incubation + acceleration programs (25 + 25) 35 learners in PhD Summer School
6	Number of evaluation reports submitted	N/A	4 (3 yearly evaluation reports and 1 final evaluation report)
5	Number of people attending the dissemination events	N/A	500
5	Number of downloads of digital content on the ESIC platform	N/A	2000
5	Number of policy recommendations	N/A	32 (3 per country + 2 EU level)

3. Scope of the evaluation

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Timeframe and deliverables

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4. Evaluation criteria

The evaluation criteria are based on the funders' requirements.

5. Evaluation methodology

The evaluator is expected to propose an appropriate methodology for this evaluation in the proposal. The analysis of project material, such as background documents and monitoring data, should be included in the process. The evaluator should propose other appropriate methods in the proposal. The forms can include, for example, interviews, focus group discussions or questionnaires. Participatory approaches are recommended to be used. Also, a tentative work plan should be incorporated into the proposal.

Initial indicators of different result levels have been identified in the project's result framework, and these should be used as tools in the evaluation. The evaluator can identify and propose additional relevant indicators initially and during the evaluation process.

6. Management of the evaluation process

The contact persons for the evaluator are Project Manager Niina Karvinen and Senior Expert Dr. Harri Kostilainen. These contact persons and the project board can propose adjustments to the draft evaluation reports where relevant, and the project board approves the evaluation reports.

7. Payment modalities

The payment for the evaluator is issued twice during the contract: half of the total sum will be issued after the project board has approved the Quality manual (due date M2) and the first bi-annual evaluation report, and the rest of the total sum will be issued after the project board has approved the final evaluation report.

The contracting parties can specify the payment terms before signing the contract.

ANNEXES

- ESIC timeline
- ESIC Work Packages
- Description of the action (DoA)



