

## IMPACT MANAGEMENT PROGRAMME: GUIDANCE FOR PROVIDERS

The Impact Management Programme aims to build the capacity of charities and social enterprises to manage their impact—helping them increase their social impact and diversify their income. It is a two year programme and will be co-designed by social organisations to ensure it is user-friendly and reflects the sector’s needs.

The Impact for Growth strand of the programme is aimed at organisations who are actively seeking investment or contracts. The programme will offer ventures training and grant funding to help them develop impact management systems that meet the needs of investors and/or commissioner. We expect to fund up to 50 grants, and there is £1.8m of grant funding available.

The aims of Impact for Growth strand of the Impact Management Programme are;

- All participating ventures develop their understanding of effective impact management of investment and contracts, and share experiences and learning with peer organisations
- The majority of participants design a project and secure grant-funding to develop this to improve their impact management systems
- Participants either successfully raise an investment / secure a contract, or understand why they have been unable to

## THE ROLE OF IMPACT MANAGEMENT PROVIDERS

The Impact Management Programme will create a database of expert providers who can help organisations with their impact management. Providers will then work with social ventures who have completed the Impact for Growth Impact Management Training. The venture and their chosen provider(s) will work together to prepare and submit a proposal for funding. This proposal will be what is required to help the venture embed impact management into their organisation, so that they can go on to raise investment or win contracts.

The role of the Impact Management providers will be to help the Impact Management venture to prepare and submit a project proposal and, if the proposal is successful in being awarded grant funding, to deliver the project.

Any work undertaken by the provider in scoping the project and preparing the proposal is undertaken at their own cost. Proposals will be assessed by a panel and will determine



whether or not funding will be awarded. The funding goes directly to the client so the provider must agree payment terms with the client for any work that will be undertaken during the project.

### **WHAT IS NEEDED TO BE AN IMPACT MANAGEMENT PROVIDER?**

As part of the application process, potential providers for the Impact Management Programme must be able to demonstrate that they have relevant experience and impact management expertise, that they have the correct insurances in place (including adequate Professional Indemnity Insurance) and that their business is financially stable. Providers are also asked to provide three case studies, all of whom should be previous clients and at least two of whom should be from the VCSE sector. Case Studies must be for services provided in an external consultancy capacity; we cannot accept references where the consultant was or has become part of the organisation (as an employee or board member). Please note that we may contact the people named in your case study as part of the application process.

Providers are expected to offer their services at a competitive rate to Impact Management clients and will be assessed during the programme for value for money. Wherever possible, clients will be offered a choice of providers to encourage the provision of competitive services. The Impact Management Programme expects fair pricing from approved providers and recognises that rates may vary for different kinds of expertise. However providers must give a day-rate which is indicative of their typical pricing and clients will be advised to compare rates for providers along with other factors when making their choice. We expect day rates to be competitive and may come back to you to negotiate to negotiate on charges if your rates are significantly higher than the average for comparable services. The maximum day-rate will in any case be £1,000 per day inclusive of VAT and all expenses and rates above the norms for the expertise involved will require written justification.

### **ACCESSING THE PROVIDER APPLICATION FORM**

Please be aware that you may see an error message when you open the form. This is because the form will not work if it opens in your internet browser.

To view it you need to download the form and save a copy on your computer. You will then be able to open the saved version of the form and complete it.



## PROVIDER APPLICATION QUESTION GUIDANCE

### Section 1 - Key Details

Please answer all questions on this section fully and accurately.

We will use the legal name provided, legal status, and company number and years in operation to perform due diligence checks. Please make sure that this information is entered accurately.

Please provide the contact details for the person who will be the lead contact for the application.

### Section 2 - Services & Expertise

**13. Please provide an overview of your organisation, its mission and main areas of business.**

Please tell us what your organisation is set up to do, what services it provides in doing this and what sectors you do this in.

**14. Please indicate which of the services listed below you would describe your organisation as having expertise in.**

We understand that you may have skills in many of these areas. However what we want to understand is which areas you consider yourself to be an expert in. We are not expecting providers to be experts in everything, and if you are an expert in only one area we will still consider your application. We are actively encouraging provider applicants to be honest and frank about where their expertise lies and selecting multiple areas that you are not expert in will not make it any more likely for your application to be approved. Some further information to explain the scope of each area is listed below;

a) Programme design/theory of change facilitation

Supporting organisations to focus, refine and codify their activities in terms of those served and intended outcomes.

b) Developing impact plans

Experience of helping organisations in developing impact plans and measurement approaches.



c) Performance management

Helping organisations to build and embed performance management and feedback loops.

d) Data management and analysis

Identifying and communicating insights from data collected.

e) Developing new products and services

Helping organisations to use their impact data to adapt service delivery, at frontline or strategic level.

f) Leadership development

Helping organisations embed impact management or measurement at all levels – frontline, executive and board.

g) IT systems support

Helping organisations to specify requirements, choose the right supplier and implement the solution.

h) Building impact measurement tools

Helping organisations to identify or create the appropriate impact measurement tool for them and their work.

i) Reviewing external evidence

Experience of using external evidence to help shape the work of charities and social enterprises organisations.

g) Culture change

Developing organisational practices and culture on how to use impact measurement tools, particularly in adapting service delivery.

**15. Please provide details of the members of your staff team who are key to your delivery of impact management services.**

Please complete the table for up to 5 key members of your team. In highlighting their skills please refer to the areas of expertise listed in question 14.



### Section 3 - Your approach

**16. Please tell us how you approach working with ventures to help them with their impact management. In particular how does your work help organisations to identify their target population, outcomes and programme design?**

What we want to understand here, is how you go about understanding an organisation and its needs. What do you do and who do you speak to within the organisation? How do you ensure that all appropriate levels of the organisations are supportive of the project and will work to make it succeed? Target population, outcomes and programme design are the building blocks of impact management. We want to ensure that our impact management providers can help ventures to understand these elements and how they fit together. Please give us an overview of how you do this, and refer to a specific example if helpful.

**17. Please tell us how you monitor and adapt projects to be responsive to changing circumstances.**

We understand that ventures are operating in a constantly changing environment. As such, the organisations that work with and support them need to be able adapt and change in line with this. We need to be sure that our providers will be able to understand the landscape that ventures are operating in and help them adapt where appropriate.

**18. Please tell us how you keep in touch with people you have worked with once projects have ended to monitor ongoing success.**

We understand that the outcomes of a project will often occur long after your work with a venture has formally finished. We want to understand how you keep in touch with ventures you have worked with to understand what long-term difference your work has had on an organisation; how your work has added value and been embedded in the organisation—as well as what may have prevented your work from being taken forward.

**19. Please tell us about your approach to learning and how you apply this in your work.**

The Impact Management Programme is designed to support Ventures to adapt and learn from their impact data. We want to understand that our providers are able to do this within their own organisations. Please tell us how you ensure that learning is applied throughout your work and how your working practices are adapted based on the feedback you receive.



## **20. Please tell us how you work in an open, transparent and accountable way.**

Impact Management consultancy is a field in which it is crucial that the value of your work is quantifiable, and communicated clearly both to the ventures with whom you work, and in the case of grant-funded projects, to the funders who are paying for it. Hence it is important for us that providers are willing to be open, share learning, and hold themselves accountable for the quality and effectiveness of their work.

Please describe examples of efforts you have made to openly share what you and the organisations you've worked with have learned. Please also highlight any examples of working in partnership/collaboration with others to achieve the aims of a project.

## **21. Please tell us how you ensure economies of scale and value for money.**

We want to ensure that approved providers for the Impact Management Programme are helping the fund to provide value for money. For this reason, we would like to understand your approach to this in your work.

### **Section 4 - Examples of previous work**

#### **Case study 1/Case study 2/Case study 3**

Please provide 3 case studies which you think best highlight the work you have done in relation to impact management and demonstrate the approach you take, as outlined in your answers to the questions in Sections 2 & 3. These case studies should provide clear examples of where more value or impact has been created, and should be case studies that the key members of staff highlighted in section 2 have worked on.

Please provide a contact for each case study and please be aware that we may contact them as part of the Provider approval process.

### **Section 5 - Financial History**

We need to ensure that our approved providers are financially viable. As such, please complete the financial summary below. We may either ask you for further information, or verify the information against public records.

