

Sheffield City Region Mayoral Combined Authority

Local Growth Fund: Ex Post Evaluation

Work Programme and Specification

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1. Introduction

This document sets out the proposed work programme and specification for the ex post evaluation of the Sheffield City Region Local Growth Fund Programme. It builds on the findings/ information collated by Focus Consultants during the Mid-Term Review which was undertaken from July to November 2020.

This specification is Focus' suggested approach to delivering this commission. Each element of the proposed study has been listed, along with the details of the work suggested and an indication of the fee/ resource allocation that would be expected. The proposed evaluation methodology has been designed not just to capture the detail of what has happened as a result of the project, but also to understand the lessons learnt and how future programmes could be shaped by these findings.

Focus suggest an indicative budget of circa £40,000 + VAT for this commission. This is based on a composite consultancy day rate of £450 + VAT. (note: within the resource allocation we would expect to see a range of personnel, including partners, associates, consultants and researchers as appropriate). A contingency of up to £4,000 should also be budgeted for any additional requirements.

A suggested breakdown of this budget against the different elements of the commission can be seen in the table below:

Indication of Fee and Resource: LGF Ex Post Evaluation			
	Days	Cost	Total
Meetings and progress reports	5	£450	£2,250
Documentation and data review	5	£450	£2,250
Financial and outputs analysis	6	£450	£2,700
Loan funding analysis	2	£450	£900
Case studies	20	£450	£9,000
Project consultation - unsuccessful and withdrawn schemes	2	£450	£900
Project consultation - funded projects	8	£450	£3,600
Staff and stakeholder consultation	4	£450	£1,800
Board member consultation	2	£450	£900
Consultation with education providers	2	£450	£900
Economic impact assessment	10	£450	£4,500
Social impact assessment	3	£450	£1,350
Energy and sustainability assessment	4	£450	£1,800
Emerging priorities/ external influences since mid-term evaluation	3	£450	£1,350
Value for money assessment	3	£450	£1,350
Recommendations, summary and next steps	3	£450	£1,350
Reporting	5	£450	£2,250
Total Days	87	£450	£39,150
Travel and subsistence - case study visits etc			£500
Overall Total Cost			£39,650

By presenting the proposed elements of the specification individually the project team can add to, remove, or increase/ decrease the importance (and associated consultancy days) of each element as they see fit. The detailed specification and work programme for the delivery of the ex post evaluation is shown over the page.

2. Ex Post Evaluation: Specification

A midterm evaluation of the SCR LGF programme was undertaken between July and November 2020. This included a review of outputs achieved to date, case studies with projects, consultation with partners and stakeholders and an initial review of the economic benefits of the programme for the local economy. As the LGF programme draws to a close an ex post evaluation of this scheme will be needed.

The audience for the report will include: Mayoral Combined Authority, LEP Board, Local Authorities and relevant Government Departments. It will be made publicly available on the SCR website. The evaluation needs to follow HM Treasury Green Book Guidance.

It is expected that the ex post LGF evaluation will build on the mid-term review by undertaking additional quantitative and qualitative analysis and research. We expect that the ex post LGF evaluation would include (but is not limited to) the following elements as shown in the table below.

Sheffield City Region – Local Growth Fund Ex Post Evaluation Specification	
Work Strand	Requirements
Meetings with the SCR client team	<ul style="list-style-type: none"> • Inception meeting to set out working practices and to agree timeframes. Face-to-face if possible. • Catch-up-meetings every two weeks with the SCR team – virtual.
Documentation and data review	<ul style="list-style-type: none"> • Documentation and data review examining any changes in policy/ strategy that have occurred since the mid-term evaluation and analysis of how this has impacted/ shaped the delivery of the overall programme and individual projects. • Analysis of any emerging policy/ strategy that will shape the direction of any future SCR grant programmes.
Financial and outputs analysis	<ul style="list-style-type: none"> • Interrogation of SCR LGF financial and output data setting out the final position. As a minimum this will need to include an analysis of outputs, spend and match-funding/ intervention rates by: geography, theme, urban/ rural and private sector/ public sector led schemes. Analysis will be required at both the project and programme level and will build on the work undertaken at the mid-term evaluation. • Analysis of the contribution of the LGF programme as a whole towards meeting the SCR targets as set out in the Strategic Economic Plan.
Loan funding analysis	<ul style="list-style-type: none"> • Update the mid-term evaluation analysis of loan funded projects to provide a more detailed examination of the success of the loan funding programme, to include, but not limited to: <ul style="list-style-type: none"> – The repayments process and clawback mechanisms – The repayment progress – value repaid etc – Recycling of any investments/ reinvestment of loan funds – Outcomes achieved by loan funded schemes versus grant funded schemes – Consultation with loan funded schemes to understand the impacts that the money has delivered

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Case Studies	<ul style="list-style-type: none"> • Follow up of the seven case studies undertaken at the mid-term evaluation to track progress, variations, long-term impact etc. • In addition to the above, a further detailed analysis of a selection of ten projects (projects to be agreed with the client team). • Case studies to include: <ul style="list-style-type: none"> – Detailed review of all project documentation, including progress towards achieving outputs and outcomes – Consultation with delivery teams – Beneficiary impact (this is dependent on the nature of the project, but could include: users of business accommodation, tourists at facility visitors, opinions on public realm, cycle path users, learners etc) – Individual economic impact assessments for the case study projects – An understanding of any wider social benefits delivered by the projects <p><i>Note: Case Studies are key element of the Ex Post Evaluation study – it is assumed that circa 20% of the project budget will be allocated to this area of work.</i></p>
Project consultation - unsuccessful and withdrawn schemes	<ul style="list-style-type: none"> • Consultation with projects that were unsuccessful in securing LGF funding, including: <ul style="list-style-type: none"> – Whether the project still took place, or took place to a lesser extent – Whether the project team understood why the project was unsuccessful in terms of the grant funding application and whether this message was communicated clearly
Project consultation - funded projects	<ul style="list-style-type: none"> • Consultation with funded projects, including an assessment of: <ul style="list-style-type: none"> – The impact of the funding and the lessons learnt – The success of the SCR management and governance arrangements
Staff & stakeholder consultation	<ul style="list-style-type: none"> • Consultation with stakeholders, including Local Authority representatives, to understand the successes, lessons learnt and future priorities for SCR.
Board member consultation	<ul style="list-style-type: none"> • Consultation with LEP Board Members, including an assessment of: <ul style="list-style-type: none"> – The level to which they feel involved – The transparency of any decision making – Any suggestions for the future
Consultation with education providers	<ul style="list-style-type: none"> • To assess the impact of the skills funded projects on the SCR skills base and highlight and future priority areas for investment.
Economic Impact Assessment	<ul style="list-style-type: none"> • An updated economic impact analysis to reflect changes since the mid-term evaluation in terms of GVA benefits - including GVA from housing, jobs and broadband investment. • This should be supplemented by calculations to capture any additional economic impacts of the programme, such as: increased visitor numbers in the local economy and impact of additional qualifications for local residents.
Social Impact Assessment	<ul style="list-style-type: none"> • Whilst a key driver for the LGF was the creation of jobs and GVA, going forward it is likely that social impact will become increasing important. The ex post evaluation will therefore need to consider: <ul style="list-style-type: none"> – The social impacts associated with the funded projects, what are they, can they be quantified?

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	<ul style="list-style-type: none"> – What lessons were learnt from the projects/ programme in terms of social impact to shape future investments.
Energy and sustainability assessment	<ul style="list-style-type: none"> • Whilst a key driver for the LGF was the creation of jobs and GVA, going forward it is likely that Energy, Sustainability and the Environment will be a key cross cutting theme for any future investment decisions. This element of the study should include, but is not limited to investigating: <ul style="list-style-type: none"> – What was the energy/ carbon impact of the LGF spend, how can this be improved – Audit/ review of what the energy standards were applied for any funded projects, were any exemplar sustainability schemes funded, what are the low carbon/ sustainability lessons learnt and suggestions for the future.
Emerging priorities/ external influences since the mid-term evaluation	<ul style="list-style-type: none"> • This element of the study should consider any external factors that have occurred since the mid-term evaluation, to include, but not limited to: the Covid 19 Pandemic and BREXIT. Areas for consideration should include the SCR response, the impact of project delivery, and ability of the programme to hit spend and output targets.
Value for money assessment	<ul style="list-style-type: none"> • Benchmarking of the programme against other similar schemes and provide a cost: benefit analysis. • Review the outputs /match funding/ intervention rates by project and theme to set benchmarks for future application and appraisal criteria.
Recommendations, summary and next steps	<ul style="list-style-type: none"> • To summarise the key impacts of the LGF programme • To provide recommendations for future SCR programmes