

AGE UK NORTH, SOUTH & WEST DORSET (AGE UK DORCHESTER LTD)

Invitation to Quote

INDEPENDENT EVALUATION OF ENERGY CONFIDENCE DORSET

Energy Industry Voluntary Redress Scheme · Phase 3 Round 1 (Impact Fund)

Reference	AGEUK-ECD-EVAL-001
Status	v1.1, 9 October 2026. For issue on 13 October 2026
Budget	£9,750 available allocation; VAT position to be confirmed
Contract period	November 2026 to March 2028 (phased inputs)
Contact	Cheryl Wright, Head of Finance, cwright@ageuknswd.org.uk , 01305 269 444

1. Background

Energy Confidence Dorset is an 18-month project funded by the Energy Industry Voluntary Redress Scheme (Impact Fund), delivered by Age UK North, South & West Dorset. Around 300 older households in vulnerable situations in rural Dorset will receive tailored energy advice, and the impact of that advice will be measured at household level using consented half-hourly smart meter data on the Levant platform, operated by our monitoring partner LDS Consulting Limited. Each home's use is measured against a weather-adjusted previous-year baseline (NMEC / IPMVP Option C) and against a comparison group of around 30 households not yet supported. The main impact measure is energy saved in kWh, with money and carbon saved, warmth, comfort and confidence as further outcomes; where a previously cold home is brought up to a safe temperature and uses more energy, that is recorded as a positive warmth outcome. The monitoring method, survey instruments and findings will be published as a reusable toolkit for the wider sector.

The charity is procuring an independent evaluator through this fair and open process. The evaluator is appointed by and accountable to the charity alone; the monitoring partner sits outside the appointment decision and has no role in the evaluation of quotes.

2. Scope of services

The evaluation spans the full 18 months, with inputs phased as follows.

- Design input (November to December 2026, completed before the second cohort is onboarded): develop the theory of change with the project team; advise on the survey instruments, the comparison design and the estimation strategy.
- Methodology assurance (by December 2026): an independent assessment of the monitoring methodology, including the weather-correction approach, baseline construction and data-quality safeguards.
- Independent re-analysis (November 2027 to February 2028): an independent re-run of the weather-corrected savings across the full anonymised dataset, with deeper validation on a sample of households.
- Process and theory evaluation: targeting accuracy, adviser workflow, resident experience through the start and exit surveys, and the replicability of the method for other organisations.
- Final evaluation report by March 2028 (month 18), with a presentation of findings to the charity and funder audience.

Optional extras, priced separately and not counted in the core budget assessment: value-for-money analysis, resident and process interviews, an interim report, and dissemination support.

3. Requirements

- The evaluation must be aligned to the HM Treasury Magenta Book; theory-led approaches, including contribution analysis, are welcome.
- The evaluator must have a demonstrable track record in fuel poverty, energy advice or closely related programme evaluation.
- The evaluator contracts directly with the charity, has direct access to the charity and to the anonymised dataset, and has the right to publish its findings, including critical findings. Independence will be stated explicitly in the engagement letter.
- Household data is accessed in anonymised form only, under the project's data-protection arrangements; all data access is audit-logged.
- The evaluator must declare any conflicts of interest, including any relationship with the charity, LDS Consulting Limited or their officers.

4. Budget and pricing

The available allocation for the core scope is £9,750, which we have scoped at around fifteen days. Quotes must set out day rates, days by task, the fee excluding VAT, any applicable VAT rate and amount, and the total payable including VAT. We are confirming our VAT recovery position, and any appointment will be subject to confirmation that the total cost fits within the available funding. If you think the work needs a different shape within that envelope, please say so. Optional extras should be priced separately.

5. Timetable

Stage	Date
Invitation issued	Tuesday 13 October 2026
Clarification questions	By 5pm, Monday 19 October 2026 (answers shared with all bidders by Wednesday 21 October)
Quotes due	By 12 noon, Monday 26 October 2026
Evaluation of quotes and award	By Friday 6 November 2026
Design work begins	November 2026, fixed before the second cohort is onboarded
Independent re-analysis	November 2027 to February 2028
Final report and presentation	By March 2028

6. Submission and assessment

Submissions (maximum 6 pages plus CVs) should include: the proposed approach and methodology; relevant track record with two references; the team and CVs; pricing as set out above; and a conflicts declaration.

Quotes will be assessed by the charity against the following weighted criteria:

Criterion	Weight
Methodology and approach, including fit with the Magenta Book and the front-loaded design phase	40%
Relevant track record in fuel poverty and energy programme evaluation	30%
Value for money within the fixed budget	20%
Independence, publication rights and conflicts position	10%

The invitation will be issued to at least three suitable suppliers and published on the charity's website. The charity is not bound to accept any quote and will notify all bidders of the outcome. Records of the process will be retained for grant audit purposes.