Specification for Mapping of the Co-operative Economy in [LOCAL AUTHORITY] and production of a Strategic Action Plan

# introduction

This brief responds to the Council’s [POLICY] which states:-

‘XXXXXXXXXXXXX.’

The Council wish to commission consultants to undertake a report (explained below) that follows the principles of the Co-operative Councils Innovation Network Direct Purchasing System where a Direct Award may be placed if under £50,000.

**CURRENT DIFFICULTIES**

The Co-operative sector whilst measurably larger in terms of turnover in 2018 than it was in 2010, since around 2014 growth has stalled.

Currently, including John Lewis Partnership and the Co-operative Group, the broad range of entities that make up the UK co-operative sector accounts for less than 1% of UK business sector.

As a consequence the UK is lagging behind and has disproportionately fewer co-operatives and mutuals than most OECD countries.

**THE PARTNERS**

[LOCAL AUTHORITY] is the lead organisation, however we are keen to design our delivery in partnership, we see the following national organisations as being key and we are interested to understand how their activity can add value to local delivery. In responding to this brief it is key you weave national delivery and support into the response.

* ***COOPERATIVES UK***
* [LOCAL CO-OPERATIVE DEVELOPMENT AGENCY]
* CO-OPERATIVE COUNCILS INNOVATION NETWORK

**PROJECT VISION**

To be a lead authority in providing a comprehensive report on its local co-operative sector mirroring the Coops UK national report on the co-operative economy tailoring the preparation of an Action Plan around initially five key themes, but able to respond too other themes that may present themselves. Working collaboratively with existing coops and introducing new sources of data.

# Project Aims and Outcomes

The project will:-

**Mapping Research**

* Produce a comprehensive mapping of all cooperatives and mutuals which have a headquarters within the Council’s boundaries.
* In responding to this brief, please provide a list of characteristics you would seek to map showing which areas are comparators to the national survey work undertaken to date ( Coop Economy Report 2020) with additional questions raised. We are keen that the mapping report should include local case studies. The mapping should also link to future national mapping for consistency of KPI measurement.

**Strategic Action Plan**

* Provide a ‘Strategic Action Plan’ that has defined short, medium and long term actions and that may be monitored over the time period to deliver the pledge of doubling the size of the cooperative sector by 2025. This needs to be focused on activities which can be delivered at a local level.

# Project governance

The project is governed in the following manner :-

* Approval for selection of consultants after receiving their written proposal.
* Executive responsibility for the delivery of the project lies with [NAME]

# requirements of brief

**The brief** involves undertaking the mapping exercise of coops and involves drafting a strategic action plan.

[LOCAL AUTHORITY] is seeking consultants to work with the project team and other stakeholders and partners to :-

1. **Map the current co-operative economy within the boundaries of the Council** using the same mapping methodology that Coops UK have used nationally.

Collate all relevant data / metrics into a report that can easily be updated on an annual basis against set criteria (assuming year on year data and trends are accurate). In addition to the national mapping, we are also interested in gathering additional research to inform our delivery at a local level. This may include, but not limited to

* + Awareness and image of coops,
  + Barriers to growth – e.g. bespoke business support / access to finance,
  + Access to focus groups and workshops, are there any informal or formal peer to peer networks, locally or access to national support.

1. **Prepare a Strategic Action Plan that can be used to identify specific target objectives around the following five strands**. It is important that proposed actions are costed and broken down between short term (1-2 years) medium term (3-5 years) and long term (5-7 years)
2. **Strategic Growth Areas**, these are sectors within the council area where we believe there are growth opportunities. Our initial thinking is this would include, Creative industries / Digital, the development of ethical finance (e.g. Mutual Banks and Credit Unions) and the care sector. We are keen to understand if these are the most appropriate sectors and what actions we should do to facilitate growth. Reference should be made to strategic sectors identified by us or our Local Economic Partnership.
3. **Access to Finance** to help co-operatives and mutuals to grow. We are interested to understand how this may be structured and how it could be linked to digital platforms such as crowdfunding.
4. **Business Support** to help existing coops to grow, we are keen to understand what specific areas of business support we should focus on.
5. The Council has an ambitious **housing agenda**, we are interested in how the Council could facilitate co-operative housing delivery models.
6. **Procurement / Commissioning**/ Market shaping, what activity could the council do to facilitate growth through our procurement and supply chain work.

**STAKEHOLDERS**

In developing your thinking it is important you liaise with key stakeholders. This will be facilitated by the council at the inception meeting. These include:-

* Councillor [NAME]
* Officers [NAMES]
* Senior Managers at our leading Co-operative [NAMES]
* [NAME] at our local Co-operative Development Agency
* [NAMES] at our local social enterprise support agency

A list of all the existing co-ops and mutuals that we are aware of will also be provided at the inception meeting.

**TIMELINES AND BUDGET**

* Written Proposal from consultants - **[DATE]**
* Appointment meeting with key council personnel - [**DATE+1 week]**
* Completion of Mapping – [**DATE+ 6 weeks]**
* Draft presentation of thinking on Action Plan – [**DATE + 8 weeks]**
* Completion of Strategic Action Plan **– [DATE + 10 weeks]**
* Presentation of findings to key stakeholders in the City **- [DATE + 3 months]**

Budget limit – Upper limit of £XXXX (total to include expenses and travel)

**PROPOSAL**

The following information should be submitted with the proposal:-

* A statement of how you expect to meet the brief including proposed timetable and any milestones, methodology and approach and your fixed fee.
* A breakdown of time between the two elements of the proposal (Mapping and Action Plan)
* CVs of key personnel that will be working on the project including relevant experience and achievements.
* The time input of key personnel.
* Details of insurance cover.
* Details of 2 referees.

# Timetable

The Consultant will be responsible for keeping the Client Working Group informed of the progress of the work. There will be a start-up meeting to clarify the objectives, working approach and timetable of meetings and presentations. However, we expect the following to be indicative of the minimum meeting requirements:

|  |  |
| --- | --- |
| Meeting | Frequency |
| Project Team / Client Meetings | Minimum 2 |
| Client Working Group / presentations | Minimum 2 |
| Stakeholder / Partner / Councillor consultation meetings | Minimum 4 days |

# DEADLINE

The quotation should clearly state the cost of completing each part of the work.

The quotation should be returned by midday on **[DATE]** to:

[CONTACT DETAILS]

# further information and PCC project lead

For further information regarding the Cooperatives Mapping exercise and Strategic Action Plan project please contact:

**[CONTACT DETAILS]**