

# Invitation to Tender

*[24 July 2020]*

**Prepared by**

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**Deadline date: 13 August 2020**

**Attached documents include**

- Sample Tender response form
- Sample budget template
- Sample contract

## **1.0 About the Health Foundation**

**1.1** The Health Foundation is an independent charity committed to bringing about better health and health care for people in the UK.

**1.2** Our aim is a healthier population, supported by high quality health care that can be equitably accessed. We learn what works to make people's lives healthier and improve the health care system. From giving grants to those working at the frontline to carrying out research and policy analysis, we shine a light on how to make successful change happen.

**1.3** We make links between the knowledge we gain from working with those delivering health and health care and our research and analysis. Our aspiration is to create a virtuous circle, using what we know works on the ground to inform effective policymaking and vice versa.

**1.4** We believe good health and health care are key to a flourishing society. Through sharing what we learn, collaborating with others and building people's skills and knowledge, we aim to make a difference and contribute to a healthier population.

## **2.0 Background to project**

**2.1** COVID-19 is a novel infectious disease, first identified in December 2019, resulting in a global pandemic, substantial and sustained negative health outcomes, and an economic slow-down.

**2.2** Alongside individual countries' domestic policy and public health interventions, there has been a significant response across the international research community to understand the mechanisms for the disease and develop treatments, vaccinations and clinical interventions, spearheaded by the WHO, in collaboration with the Global Research Collaboration for Infectious Disease Preparedness and Response (GLOPID-R).

**2.3** In the UK, funders and researchers have responded to the immediate crisis by reprioritising work programmes, extending existing schemes and developing new partnerships to address the outbreak. The joint GLOPID-R and UKCDR COVID-19 research project tracker reports that at the beginning of June nearly £30m had been committed by funders to support research projects on COVID-19 in the UK. This figure is likely to be substantially higher when taking account of investment from private industry and the contribution made by national research centres and independent research organisations, facilities and collaborations.

**2.4** Despite this enormous investment, the impact of COVID-19 will stretch far beyond our usual measures for health, with current social, political and economic interventions having – as yet – unknown and far reaching consequences for long-term health outcomes and the global recovery. In recognition of the challenge, funders are now beginning to shift the focus of their funding programmes beyond the immediate term (12 – 18 months from the start of the outbreak) towards the recovery period (18 months to 3 years post-outbreak) and to look at the broader impacts of the outbreak on inequalities, health service and social care delivery and population health.

**2.5** Examples of this include: The Nuffield Foundation which committed £1.6 million to fund research on the social, cultural and economic impacts of the pandemic. The latest tranche of funding from UKRI to support projects addressing and mitigating not only the health impacts of COVID-19, but also the social, economic, cultural and environmental impacts of the pandemic. The NIHR call for research to better understand and manage the health and social care consequences of the global COVID-19 pandemic beyond the acute phase and up to three years post-outbreak. And most recently, the Health Foundation rapid open call in June 2020, to support applied research on the impact of COVID-19 on service change in the health and social care system and health inequalities.

### ***The Next Phase***

**2.6** The Health Foundation believes good health and health care are key to a flourishing society. Through sharing what we learn, collaborating with others and building people's skills and knowledge, we aim to make a difference. As an independent Foundation, we are able to have a long-term focus on health, health care and social care across the UK.

**2.7** As part of this work, we began discussions with key stakeholders (including representatives from funding organisations and leading academics in public health, health care and social care) in April 2020 and have been working closely with colleagues across NIHR, UKRI, The Wellcome Trust, Nuffield Foundation and beyond to understand the issues and identify areas where further action could be taken.

**2.8** These discussions highlighted a number of challenges facing funders in both having the time and space to think longer-term, and in co-ordinating and prioritising research agendas. Specific concerns across funders included:

- **The focus of research funding:** Most funders noted that current funding programmes are primarily focused on addressing the immediate crisis and on the biomedical and clinical research needed to understand the disease. Funders recognised that while this was hugely important, many of the existing interventions aimed at preventing the spread and impact of the disease have been based on social and economic measures including reductions in movement and trade, fiscal support for businesses and individuals, public health interventions based on behavioural science, and tracking and analysing the numbers of deaths in specific populations etc. Potential gaps in the current agenda include research at the meso- and macro-level to explore the long-term impact of the pandemic and associated policy decisions on inequalities; the preparedness and resilience of the system to further major health shocks; the role and contribution of national, devolved and local policy and system responses to public health; the interfaces between health and other sectors such as the role of manufacturing, food production and pharmaceuticals in strengthening the UK response; the impact of large scale policy interventions (such as school closures) on wellbeing, employment and long-term health outcomes; what the UK might learn from other countries' approaches to the pandemic; and what a co-ordinated international response may look like in the future.

- **Concerns around long-term co-ordination:** While research funding programmes have been largely collaborative across funders in the short to medium term, there is concern that the opportunity for joint working will reduce over time, resulting in lost opportunities to explore the interfaces between sectors and disciplines to understand the implications for policy and practice in the longer -term. For example, epidemiological modelling which doesn't integrate its evidence with ethnographic studies on how communities have responded; or public health research which doesn't draw on the evidence of disease transmission across multiple settings such as public transport and working environments; or the implications of an international workforce in health and social care and decisions around status and immigration policy in terms of mobilising expertise quickly, risks underestimating the complexity of the pandemic's spread, its impact on our future resilience and our ability to develop suitable policy responses in the future.
- **Broader engagement in developing the agenda:** Finally, there is recognition across funders that the current research agenda is being constructed by expert panels comprising policy leads, researchers and funding organisations without giving equal voice to the people involved in the health and care system, the third sector, local government or the public or communities who have been most significantly impacted by the pandemic. This is largely down to the necessary speed of the response, but also reflects broader challenges across funders in bringing together a mix of expertise and experience, and in capturing the needs of marginalised communities, to ensure we develop research programmes which address multiple needs. Consequently, there is a real and significant risk that without proper engagement of a wider variety of stakeholders, the inequalities which have been highlighted through COVID-19 become further entrenched.

**2.9** Within this context there is clearly a greater role for increased social, economic, public health and policy research to understand both the UK's current response to the COVID-19 pandemic, and the implications of the outbreak on long-term health outcomes. Research is also needed to support the development of policy to improve the UK's resilience to the pandemic and future health shocks, as well as improving the preparedness of the health care and social care system across the UK.

**2.10** These challenges are not insurmountable but require a co-ordinated approach, and the ability to bring together voices from across the UK (and beyond), to develop a shared vision for the long-term research agenda which can inform both funding decisions and policy development in relation to lasting health impacts of the COVID-19 outbreak.

### **3.0 Details of the work**

**3.1** Working with partners, funders, academics, policymakers, and NHS and social care leaders, the Health Foundation is seeking to develop a shared vision for the long-term social, political, economic and public health research agenda in relation to:

- health outcomes and their distribution across society – this includes the direct impact on morbidity and mortality through this period and beyond, as well as the indirect impact caused by socio-economic changes in response to the pandemic and the influence on the wider determinants of health;

- the structure and delivery of health and social care services, including the future provision and demand for services, potential for service innovation, access to services, quality and efficiency;
  - public health systems; and
  - policymaking to plan, prepare and manage key threats to health in the future and the co-ordination of policies across sectors.
- 3.2** The programme is designed to be highly inclusive and participatory, based around a series of deliberative events. It will bring together a range of stakeholders from across research disciplines and sectors, policy expertise and research funders, third sector organisations academic research and independent research organisations, and with the public, to identify, refine and develop the key areas and associated research questions on which to base future funding programmes and research activity across the UK.
- 3.3** We are particularly interested in taking a complex systems perspective, looking at the meso- and macro- level research questions which the current crisis has highlighted, and designing a process which captures and explores the research questions which sit at the interfaces between research disciplines, and across different sectors and communities.
- 3.4** We are looking to engage the public in the debate, including representatives from communities who have been adversely impacted by the pandemic and have experienced significant health inequalities. We also want to learn from the international research community and responses to COVID-19, particularly drawing on the experience of low- to middle- income countries who managed their early responses to the pandemic very effectively, and who will be impacted by how the UK, and its partners in the US and Europe, respond to the global outbreak.
- 3.5** Outputs will include a report detailing the findings from the work with the aim of informing key agendas across funders, policymakers and the wider research community to help shape research activity in response to the COVID-19 pandemic, ready for peer reviewed publication.
- 3.6** In parallel with the work of the supplier the Health Foundation and its partners will be developing a communications and influencing strategy to engage and inform policy makers and funders from across the UK by sharing emerging themes and findings from the provider's work as it progresses. It is important that the supplier is able to work with the Foundation in developing the strategy.

#### **4.0 Aim and scope of the programme**

- 4.1** The aim of the programme is to develop a shared vision for a long-term research agenda following COVID-19, across funders and other stakeholders to support the development of future funding programmes, and ensure the UK has the research evidence needed on which to develop health policy and practice in response to the challenges posed by the current pandemic, and in ensuring the UK's resilience to future pandemics.
- 4.2** In developing the agenda, priority should be given to:

- involving a wide range of stakeholders from across the UK landscape in shaping the outputs
- building in multi-disciplinary methods and perspectives to the agenda-setting process
- developing processes and approaches to design of the programme which draw in perspectives from those communities most adversely impacted by COVID-19, and whose voices are often left out of the agenda setting process
- identifying key themes and challenges posed by the pandemic, and the research priorities which sit under these
- exploring how the research system may respond to the findings of the work and co-ordinate to take forward the priority areas.

**4.3** Importantly the work will look at the wider and social determinants of health – taking a long-term view of what questions need to be researched in order to address systemic inequalities in the way policy is developed and/or in the way services are delivered.

**4.4** At this stage, we anticipate the programme of work will include (but not be limited to):

- Working with the programme steering group and delivery team to develop and refine an overarching theory of change for the programme; clarifying outcomes and ensuring there is consensus on the focus of effort across members
- A stakeholder mapping exercise in response to the Theory of Change, including key audiences and stakeholders for interview
- A funding landscape review based on interviews with funders and reviewing existing trackers and websites to identify what is being funded and what is planned<sup>1</sup>
- Based on these, conducting multiple stakeholder interviews to identify cross-cutting themes for research
- An in-depth prioritisation exercise with thought-leaders, academics, and wider system stakeholders (eg Delphi) to identify key themes
- Followed by a series of virtual deliberative events with stakeholders, and the public, to develop the key research questions and agenda under each theme
- A final report/paper suitable for peer reviewed publication, plus 2 -3 presentations to key stakeholder groups

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<sup>1</sup> This may also require updating the initial funding review as time progresses in recognition of the speed the research funding landscape is moving.

- An event to share findings with key thought- and systems leaders, policy makers and funders from across the UK.

**4.5** The breadth and depth of the programme is significant and potential suppliers should describe in their proposal how they intend to scope and deliver the work. This should include details of the proposed stakeholder groups and planned engagement approaches for each phase of the work, including an overarching sampling framework, and any permissions or approvals expected to be required to complete the work.

**4.6** In developing a response to this tender, potential suppliers should give due consideration to three areas:

- How the process in itself can be used to engage stakeholders in thinking about the long-term research agenda, and influence both funding and research programmes as it develops
- How the process will deliver a highly participatory approach to public involvement that is representative of the communities that have been most impacted by the COVID-19 pandemic, both through active participation in the deliberative events, but also other opportunities the steering group may not have yet considered. Due consideration should also be given to accessibility of materials, facilitation approaches and the technical limitations and barriers to participation through running online events
- How the successful team will work and engage with the Health Foundation communications team to ensure that the programme is joined up effectively with our own communications activities and contributes to delivery of our corporate communications aims, so that opportunities to influence the funding response and policy landscape through our work are maximised.

**4.7** Finally, the Health Foundation is seeking to support a wider engagement piece for the UN, in partnership with other social science funders. More details can be provided at interview, but potential suppliers should allow for flexibility in their approach to bring forward elements of the stakeholder interviews within the first two weeks of the contract, if required.

## **5.0 Audiences for the work**

**5.1** A significant impact of the work will be to bring together experts from across disciplines and sectors to discuss how we configure a research agenda that addresses the complexity of the COVID-19 outbreak, in terms of both understanding its impact and in supporting our response to similar events in the future. Therefore, it is critical that the design of the process, underpinning the outputs, factors in and maximises these opportunities to both seek input but also to engage and influence these stakeholders in support of the ultimate goal of the programme. This applies to both the way that sessions are framed and facilitated and in the quality of the outputs from the programme. Ensuring clarity on the Health Foundation's ownership of the programme will also be key.

**5.2** Key audiences for the work include:

- National funding bodies, charitable research funders, policy leads for research in each of the devolved nations and international funders
- Health and social care policymakers and systems leaders, as well as national representative bodies
- Third sector, voluntary and community organisations and leaders from those communities most adversely impacted by the outbreak
- Thought leaders, systems stewards and academics working in public health, health care and social care
- Thought leaders in those academic communities and in policy and practice areas which have a direct impact on short- and long-term health outcomes (eg education, work and pensions etc).

**5.3** This programme of work is led by the research team, reporting into the Director of Research and working with senior leaders across other funders. However, it will sit alongside and inform the Health Foundation's Shaping Health Futures programme and be overseen by the Chief Executive's office. Suppliers should, therefore, be looking to bring together a highly credible and experienced team, capable of producing high quality and robust outputs to support the aims of programme.

## **6.0 Programme Management and Governance**

**6.1** The Health Foundation takes a collaborative approach to its work. The successful team will demonstrate a strong track record of delivery, with clear programme management approaches including risk management. They will also be able to demonstrate they can mobilise resource quickly in order to meet the brief.

**6.2** Due to the rapid nature of this work, the successful provider will also be expected to work closely with the Health Foundation Research team to oversee the delivery of the day-to-day work. The delivery team will meet once a month and will be led by a Research Manager and supported by a Research Officer. Additional attendees will include the Assistant Director of Research and a Communications team lead as necessary. This meeting will cover regular updates on progress, be used to iron out any difficulties, update the risk register and work through any changes in approach or methods as the programme develops. The provider will also be expected to work collaboratively with the Health Foundation's communications team as part of the work of this group, so that its activities are effectively aligned with our wider engagement and influencing work, opportunities to influence funding agendas are maximised as they emerge, and the Health Foundation's reputation and brand are protected and enhanced. The programme lead will also be expected to keep the Research Manager up to date, as necessary, via the telephone/email etc.

**6.3** The Health Foundation will also establish an internal steering group who will provide the necessary oversight and monitoring for the programme. This will meet virtually on a monthly basis (alternating fortnightly with the delivery team meeting above). It will be chaired by the Director of Research and REAL, Anita Charlesworth. The steering group will bring together the delivery team, plus strategic leads across the Foundation, partner organisations/strategic advisors and members of the advisory group where needed.

- 6.4** In addition to this, a programme advisory group will be established, meeting at the start of the programme and again towards the end. This will be chaired by our Chief Executive, Dr Jennifer Dixon, and bring together senior representatives from across the funding landscape, policy leads and sector and community stakeholders. The group will provide strategic and academic/sector direction, as well as constructive challenge and rigour, to all elements of the design and delivery of the programme; ensuring it meets its overarching aims and objectives. (See Appendix 1 for further information).
- 6.5** The successful team will need to present their approaches and findings at all meetings and respond to the feedback given in response to the advisory group discussions.
- 6.6** We will work closely with the provider to develop key messages and to draw out the implications of the findings, as well as overseeing, guiding and collaborating on any agreed communications activities related to the programme and its findings. Outputs will need to be suitable for a wide range of audiences. Please ensure that your proposal makes reasonable allowance for the time required to fulfil these obligations and with regards to dissemination throughout the duration of the programme.
- 6.7** Finally, the Health Foundation is currently setting up and developing an inclusion panel to support the design and development of all our research programmes. In the early stages, the panel is likely to draw on experts from a range of different areas of policy, research and lived experience of health inequalities. Potential providers are asked to note this, and to consider how they might engage with the panel if required.

## **7.0 Deliverables and Timelines**

- 7.1** The primary goal of the work is to develop a shared vision on the key research priorities facing the UK considering COVID-19. It is designed to influence funding strategy across the research eco-system and support the generation of evidence to inform long-term policy making in relation to the UK's pandemic response.
- 7.2** It will do this by both the processes it uses to engage funders and key stakeholders throughout the programme, and in the development of robust outputs which can be widely disseminated and implemented.
- 7.3** It will produce at least one peer-reviewed paper, to be published in a high impact journal, setting out the research themes and questions emerging from the deliberative process; combined with a roundtable event bringing together systems leaders and funders from across the public and charitable sectors, to discuss the implications of our findings and support priority setting across funders and national and local research networks such as UKRI, AHSNs, central government etc. Potential suppliers should build this into their tender responses and cost these activities appropriately.
- 7.4** The Foundation may also decide to run additional events based on the work from the programme. These will be negotiated on a case by case basis, but potential providers should provide an indicative cost for a single event within their bid.
- 7.5** Specific deliverables will include:

- An inception meeting with finalised protocol and plan
- A theory of change and stakeholder map
- A first-stage interim report on the initial funding landscape review and funder interviews, complete with protocol update and list of proposed stakeholder interviews, interview guide etc.
- A second-stage interim report, outlining the findings from the Delphi exercise and final plan for the deliberative process
- A final technical report and plain English report and 2-3 presentations to key stakeholder groups (including the steering group and advisory group)
- A paper of sufficient quality to be put forward for peer review (in partnership with the Health Foundation)
- Delivery of an event to share findings with key thought- and systems leaders, policy makers and funders from across the UK.

## 8.0 Timelines

8.1 We understand the timelines and speed of this project are challenging. This reflects the rapidly changing nature of the funding landscape in response to COVID-19 and providers will need to work flexibly with us as the programme progresses. Therefore, providers should indicate (a) how they will resource the project within the timeline indicated (b) the risks and challenges associated with this timeline and potential strategies to mitigate these and (c) what steps they can build in to respond to external changes in the landscape as they emerge.

8.2 The substantive work will commence in early September 2020 with the scoping and mapping exercise, stakeholder interviews, prioritisation and deliberative work completed by the end of the year. Should we reach agreement on the rapid turnaround public participation piece, this will need to be completed by late August and providers should make a note of this in their proposals.

Item	Date
Invitation to tender released	Friday 24 July 2020
Information call	Thursday 30 July 2020
Closing date for applications	Thursday 13 August 2020
Internal review, external peer review and assessment meetings	w/c 17 August 2020
Interviews	2 & 3 September 2020
Successful provider notified	4 September 2020
Inception meeting	w/c 7 September 2020
Theory of Change (overall programme) completed	14 September 2020
First interim report	30 October 2020
Second interim report	27 November 2020
Final reports & presentations	8 January 2021
Delivery of round table event	End of January 2021
Submission ready peer review paper	End of February 2021

## **9.0 Costs**

**9.1** We anticipate bids up to a maximum of £300,000 (inclusive of VAT and expenses).

**9.2** Responses to this invitation should include accurate pricing, inclusive of expenses and VAT. It is emphasised that assessment of responses to this tender invitation will be on perceived quality of service and demonstrable ability to meet the brief, rather than lowest cost, but value for money is a selection criterion and is assessed by independent peer review.

## **10.0 Tender response requirements**

**10.1** Providers are requested to complete a tender response form on the AIMS system in presenting their response.

**10.2** Detailed provider information should include:

- organisation name, address, registered address (if different) and website address
- description of the organisation's activities or services,
- history and ownership
- organisational governance and management structure
- most recent company accounts.

**10.3** Information in response to the tender should include:

- details of your proposed approach, including (but not limited to):
  - stakeholder groups for the work
  - engagement strategies for each phase of the work
  - methods and approaches to achieving the aims of the programme
  - proposed timelines and phasing of the work
  - permissions and approvals required to complete the work
  - dissemination strategy and plans for the work
- proposed approach to working with the Health Foundation on the project
- summary of the experience of the key personnel who will be involved in the project
- costs, including a summary of the day rates and required days of those employed on the project, inclusive of VAT and expenses
- project and risk management, including information on information governance and data protection
- primary contact name and contact details
- details of the team carrying out the work – names, roles and expertise relevant to the tender

- client references, including information on comparable organisations to which you have supplied a similar service and a brief project description for each.

**10.4** Please provide a statement of your willingness to reach a contractual agreement that is fair and reasonable to both parties. Please find attached a copy of our standard contract and outline any disagreements you may have with these.

#### **11.0 Instructions for tender responses**

**11.1** The Foundation reserves the right to adjust or change the selection criteria at its discretion. The Foundation also reserves the right to accept or reject any and all responses at its discretion, and to negotiate the terms of any subsequent agreement.

**11.2** This work specification/invitation to tender (ITT) is not an offer to enter into an agreement with the Foundation, it is a request to receive proposals from third parties interested in providing the deliverables outlined. Such proposals will be considered and treated by the Foundation as offers to enter into an agreement. The Foundation may reject all proposals, in whole or in part, and/or enter into negotiations with any other party to provide such services whether it responds to this ITT or not.

**11.3** The Foundation will not be responsible for any costs incurred by you in responding to this ITT and will not be under any obligation to you with regard to the subject matter of this ITT.

**11.4** The Foundation is not obliged to disclose anything about the successful bidders, but will endeavour to provide feedback, if possible, to unsuccessful bidders.

**11.5** Your bid is to remain open for a minimum of 180 days from the proposal response date.

**11.6** You may, without prejudice to yourself, modify your proposal by written request, provided the request is received by the Foundation prior to the proposal response date. Following withdrawal of your proposal, you may submit a new proposal, provided delivery is effected prior to the established proposal response date.

**11.7** Please note that any proposals received which fail to meet the specified criteria contained in it will not be considered for this project.

**11.8** It is important to the Foundation that the chosen provider is able to demonstrate that the right calibre of staff will be assigned to the project; therefore, the project leader who will be responsible for the project should be present during the panel interviews if you are selected.

**11.9** It is important to the Foundation that the chosen provider is able to demonstrate that the right calibre of staff will be assigned to the project; therefore, the project leader who will be responsible for the project should be present during the panel interviews if you are selected.

## 12.0 Selection process

### How to apply

- 12.1** The **deadline to submit a tender response is 17:00 on Thursday 13 August 2020**. We will not accept proposals submitted after this time.
- 12.2** Please complete the online tender response form on the AIMS system by **[Please read the AIMS user guide before starting to complete the form. This is available on our website and via the online form on the AIMS system.**

### Information call

- 12.3** We will hold an **information call via Zoom at 16:00 on Thursday 30 July 2020**. The call will last an hour. If you would like to attend, please email [Research.Mailbox@health.org.uk](mailto:Research.Mailbox@health.org.uk) by 16:00 on Wednesday 29 July. Joining instructions will be sent to you in advance of the call.
- 12.4** Information calls offer applicants the opportunity to hear more about the programme and ask questions to clarify understanding. Please note that we will not be able to answer specific technical questions about individual tender responses.
- 12.5** You are strongly encouraged to participate in the information call.

### Assessment and selection criteria

- 12.6** We intend to **interview shortlisted bidders on the 2 and 3 September 2020** to explore proposals in more depth. Interviews will be held via Zoom. Please ensure you are available for interview on this date. An invite to interview will be made by 5pm on Monday 24 August 2020.
- 12.7** Assessment of applications will take place during w/c 17 August. Applications will be assessed in accordance with instructions given to providers by the Health Foundation and the assessment and selection criteria set out in this invitation to tender.
- 12.8** A final decision regarding appointment of a supplier will be communicated on 4 September 2020.

### Proposed start date

- 12.9** The proposed start date for the work is 7 September. When applying, applicants should confirm they have appropriate resource and governance structures in place to begin the work on the proposed start date.

## 13.0 Selection criteria

- 13.1** We recognise the scale and ambition of this work is significant and we welcome bids from consortia as a result.
- 13.2** Responses will be evaluated by the Foundation using the following criteria in no particular order:
- Appropriateness of the proposed approach to address the aims and scope of the programme, including:
    - the inclusion of suitable stakeholder groups for the work

- an appropriate participation strategy for the work
- realistic and achievable timelines for the work
- demonstrable understanding of the permissions and approvals required to complete the work
- a suitable dissemination strategy and plan for the work including how we maximise the impact of the programme
- Suitable experience, expertise and connection of the provider to relevant stakeholders and communities of practice
- Evidence of proven success of similar projects / evidence of adaptability of any existing products to be used
- Ability to use inclusive approaches to engaging marginalised communities
- Appropriate project management, risk management and quality assurance
- Capacity to begin the work on the proposed start date and deliver the work on time, on budget and to the required standard
- Appropriate risk assessment
- Value for money

#### **14.0 Confidentiality**

**14.1** By reading/responding to this document you accept that your organisation and staff will treat information as confidential and will not disclose to any third party without prior written permission being obtained from the Foundation.

**14.2** Providers may be requested to complete a non-disclosure agreement

#### **15.0 Conflicts of interest**

**15.1** The Foundation's conflicts of interest policy describes how it will deal with any conflicts which arise as a result of the work which the charity undertakes. All external applicants intending to submit tenders to the Foundation should familiarise themselves with the contents of the conflicts of interest policy as part of the tendering process and declare any interests that are relevant to the nature of the work they are bidding for. The policy can be found and downloaded from the Foundation's website at the following location: <https://www.health.org.uk/COI>

## Appendix 1: Programme Governance Structure<sup>2</sup>

Delivery Team	Programme Steering Group	Programme Advisory Group
<ul style="list-style-type: none"> <li>• Purpose: Day to day operational management of the programme</li> <li>• Chair: Research Manager</li> <li>• Attendees: Research Manager, AD of Research, Research Officer, Comms lead and Supplier</li> <li>• Frequency: Two weekly (alternating with Steering Group meetings)</li> </ul>	<ul style="list-style-type: none"> <li>• Purpose: Oversight and strategic direction of the programme in line with HF priorities</li> <li>• Chair: Director of Research and REAL</li> <li>• Attendees: Research Manager, AD of Research, Strategic leads across Foundation, Partners/Strategic Advisors and Deputy Director of Comms</li> <li>• Frequency: Monthly (alternating with Delivery Team meetings)</li> </ul>	<ul style="list-style-type: none"> <li>• Purpose: Strategic, academic and policy direction, as well as constructive challenge and rigour, to all elements of the design and delivery of the programme, ensuring it meets its overarching aims and objectives</li> <li>• Chair: Chief Executive of Health Foundation</li> <li>• Attendees: Research Manager, Programme Manager, Assistant Director of Research, expert academic stakeholders and representatives from the audience groups highlighted in section 6.2</li> <li>• Frequency: Two to three times during the programme</li> </ul>

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<sup>2</sup> Please note in the current context we are assuming all meetings will take place virtually

## Appendix 2: AIMS quick start

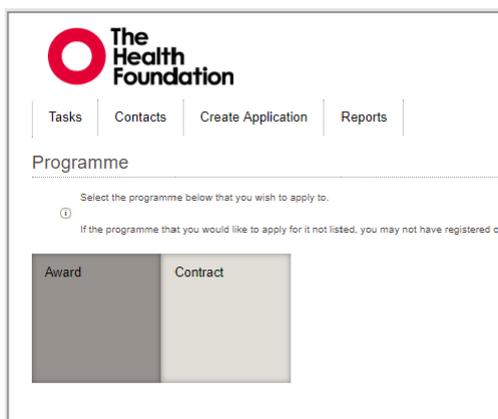
Once you have registered with AIMS and activated your profile via the verification email, you can start a tender response. If you are applying on behalf of a team or organisation, register with the organisation via the 'Contacts' tab before doing so.

Then click on '*Create Application*' and select to apply on behalf of the organisation you have just registered with.

The following options depend on if the call will be open or closed. Delete as applicable. Note that if the call is closed, the applicant will need to be registered to apply for a closed call prior to them starting an application. Please ask your BM for information on this process.

### Option one: Open tender instructions

Select the '*Contract*' programme, as shown below.



The screenshot shows the AIMS application interface for The Health Foundation. At the top left is the logo. Below it is a navigation bar with tabs for 'Tasks', 'Contacts', 'Create Application', and 'Reports'. The 'Create Application' tab is active. Below the navigation bar is a section titled 'Programme'. Under 'Programme', there is a dropdown menu with the text 'Select the programme below that you wish to apply to.' and a small icon. Below the dropdown menu, there is a note: 'If the programme that you would like to apply for it not listed, you may not have registered co'. At the bottom of the 'Programme' section, there are two buttons: 'Award' and 'Contract'. The 'Contract' button is highlighted in a light grey color, indicating it is the selected option.

On the next screen, click into the drop down menu and select the *[insert name here]* in the drop down for 'Programme call', as shown below.

The Health Foundation

Tasks - Test | Contacts | Create Application | Reports

Programme Call

Programme Call: \*

\* required

OK

### Option Two: Closed tender instructions

Select the 'Contract – By Invitation Only' programme as shown below.

The Health Foundation

Tasks - Test | Contacts | Create Application | Reports

Programme

Select the programme below that you wish to apply to.

① If the programme that you would like to apply for it not listed, you may not have registered correctly.

Award	Award - By Invitation Only	Contract	Contract - By Invitation Only
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On the next screen, click into the drop-down menu and select the *Long term research agenda: COVID-19* in the drop down for 'Programme call', as shown below.

## Programme Call

Programme Call: \*

\*Select the relevant call\* ▼

OK

\* required