Project specification and response form

Evaluation of the Health Foundation’s Inclusion Panel

A process evaluation of the recently established Inclusion Panel

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The Health Foundation

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1. About the Health Foundation

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

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 front line to carrying out research and policy analysis, we shine a light on how to make successful change happen.

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.

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.

1. Background to project

In line with our mission to improve health and health care for all in the UK and one of our priorities to address health inequalities, the Health Foundation has committed to developing an organisational approach to mainstreaming and embedding diversity and inclusion (D&I) across the organisation. As part of this commitment, the research team at the Foundation established an **Inclusion Panel**.

We created the Inclusion Panel to advise us on the research that we plan, fund and commission, with the aim of enhancing our ability to improve health for all – especially those most marginalised – while strengthening the D&I work taking place across the Foundation. We now have a real opportunity to ensure the work we do is more inclusive.

The Inclusion Panel is acting as a reference group for teams across the Foundation as they developed their research and analytical questions around health inequalities in response to COVID-19. The Inclusion Panel does not have decision-making powers, but is expected to provide advice and guidance to teams to help:

* Test and refine research and analysis questions
* Generate ideas for further research and analysis or for new programmes of research
* Improve the interpretation of results of research (sense-making)
* Shed light on the mechanisms influencing the results of research.

The Inclusion Panel was set up in summer 2020 at speed as a proof-of-concept prototype with a clear and specific remit to meet an immediate short-term need to help shape research questions around the Health Foundation’s COVID-19 research open call in 2020. The panel is currently managed by a consultant (Furner Communications) with relevant experience and led by the research team – working with teams across the Foundation to make sure it meets their needs and is accessible to all. With ongoing input from colleagues across the Foundation and advice from external stakeholders, we hope that the panel will evolve into a longer-term corporate resource, subject to the results of this evaluation.

With guidance from the Health Foundation, Furner Communications recruited about 25 individuals on to the panel from groups that are traditionally marginalised and underrepresented in research (eg researchers or research participants from ethnic minorities, people with learning disabilities, people with experience of homelessness, and people from LGBT+ communities) who have a better understanding of the health, health care or social care needs of those underrepresented groups and can guide our research accordingly.

The aim of enlisting people with lived experience on to the panel was to give us much-needed insights into what it is like to access health and care services, for example, or to live with a particular health condition during the COVID-19 pandemic. We expect that these insights will help make our analysis more sensitive to the needs of patients, carers and service users.

The Project Team (see Appendix I) and Furner Communications also engaged with external stakeholders for independent advice on the development and delivery of the inclusion panel.

The Inclusion Panel is due to run until the end of 2021. This will be in parallel with the duration of the COVID-19 research programme awards – by which time we hope to have a more fully-formed model for the Inclusion Panel, with a better understanding of its scope, operation and long-term value. Furner Communications will report to us at the end of this period, when we will seek approval from Directors to continue to run the Inclusion Panel. Details of the Governance Structure are provided at Appendix I.

1. Details of the work

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| Aims and Objectives | To provide a robust and credible process evaluation of the Inclusion Panel to identify:   * Lessons learnt from the process of developing and running the Inclusion Panel * Enablers and barriers to the success of the Inclusion Panel in improving diversity and inclusion in the work of the Health Foundation * Impact of the Inclusion Panel on the work of the Health Foundation research team and work funded by the Health Foundation * Recommendations for how to proceed in developing and improving diversity and inclusion in the work of the Health Foundation, specifically in relation to the Inclusion Panel. |
| Overview of the work required | The successful supplier will be expected to conduct a number of interviews and/or focus groups with:   * Inclusion Panel members (sample from 25 members) * Project team (staff from the research team) and Furner Communications * Teams that have engaged with the panel to date * Foundation staff that have not engaged with the panel (to understand their perceptions of the Inclusion Panel) * Steering group members (first meeting will be in May) * External stakeholders (sample from five)   In addition, we would expect the successful contractor to carry out a desktop review of relevant documents; and to attend and observe one of the panel meetings and to review relevant documentary material relating to the establishment and running of the panel.  Completion of a draft and final report and slide pack setting out the findings of the evaluation to be presented to the steering group. |
| Accountability | The successful contractor will be expected to provide monthly updates on the progress of the evaluation to the Health Foundation project manager, and to identify and communicate any risks at the earliest possible opportunity. |

1. Deliverables

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| Delivery requirements | A draft report and executive summary will need to be completed by 17 September 2021  A final report, executive summary, and slide pack will need to be completed by 19 October 2021. The executive summary will be shared with the Inclusion Panel, it should be written appropriately. |
| Outcomes | The work will be for the internal requirements of the Health Foundation and to inform decisions about the future of the Inclusion Panel. In addition, we will want to share the findings more widely as part of our influencing work. |

1. Budget
   1. The budget for this evaluation is up to £25,000 including VAT.
   2. The Health Foundation will provide support for any accessibility requirements.
2. Instructions for tender responses
   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.
   2. This work specification 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 specification and request for response or not.
   3. The Foundation will not be responsible for any costs incurred by you in responding to this specification and will not be under any obligation to you with regard to the subject matter of this specification.
   4. The Foundation is not obliged to disclose anything about the successful bidders, but will endeavour to provide feedback, if possible, to unsuccessful bidders.
   5. Your bid is to remain open for a minimum of 180 days from the proposal response date.
   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.
   7. Please note that any proposals received which fail to meet the specified criteria contained in it will not be considered for this project.
3. Selection criteria
   1. Responses will be evaluated by the Foundation using the following criteria in no particular order:

* Ability to deliver on all required services or outputs
* The quality and clarity of the proposal, products or services
* Understanding of the role of diversity and inclusion in research
* Evidence of proven success of similar projects/evidence of adaptability of any existing products to be used
* Responsiveness and flexibility
* Value for money
* Ability to work with others.
  1. It is important to the Foundation that the chosen provider can 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.

1. Selection process
   1. Please email electronic copies of your full proposal plus any accompanying documents to inclusion.panel@health.org.uk by 1pm on 7 May 2021.
   2. Short-listed applicants will be notified on Thursday 20 May.
   3. Interviews will be held on Tuesday 25 May.
   4. Final decision will be communicated by 11 June 2021.
   5. Start date to be agreed following the final decision and would be as soon as practicable.
2. Confidentiality
   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.
   2. Providers may be requested to complete a non-disclosure agreement.
3. Conflicts of interest
   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 I

Governance structure

Project Team

* The Project team currently consists of Hardeep Aiden (Project Manager) and Sarah Singfield (Project Support) with Anita Charlesworth/Usha Boolaky acting as Project Sponsor.
* Its activities include day-to-day management of the inclusion panel design and delivery; coordination across all areas of the panel; delegation to other members of the Project Team (including consultants if applicable); and risk management.

Consultant

* The Project Team will commission one or more consultants who will be responsible for the day-to-day management of the inclusion panel, providing expert insight into panel development and documentation, and facilitating the transition from inclusion panel to full inclusion panel, with ownership of delegated risk items.

Steering Group

* The Project Team and the Consultant will be guided by a Steering Group whose membership comprises of senior management representation from key teams, eg research, improvement.
* The Steering Group will provide high-level recommendations on the planning and delivery of the inclusion panel to ensure that the resulting output meets the user needs of teams across the organisation.

Specification Response

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| Response to: | [Insert name of project in specification] |
| Name of applicant: |  |

**Contents:**

1. About your organisation
2. Proposal
3. Management and communications
4. Details of team members
5. Resources
6. Contract
7. About your organisation
   1. Organisation details

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| Organisation Name |  |
| Type of organisation |  |
| Company or Charity Number |  |
| VAT Number (if applicable) |  |
| What was your organisation’s income in the most recent financial year? *(Not applicable for public bodies/universities)* |  |
| Address |  |
| Registered Address (if different) |  |
| Website Address |  |
| Primary contact name including position and title (to whom all correspondence will be addressed) |  |
| Phone numbers (office and mobile) |  |
| Address |  |
| Email address |  |

* 1. Organisational description

Please provide a brief description of the organisation in terms of its activities/services and the organisational governance and management structure

1. Proposal
   1. Please use this section to provide an overview of your proposal

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Please give us the details of your proposed approach remembering to refer back to the Project Specification. Your proposal must include detailed plans ensuring the following issues are addressed:

* 1. How will your proposal meet the needs of the Health Foundation?
  2. Your approach and methodology
  3. Your relevant experience and expertise
  4. Capacity to deliver and value for money
  5. Any other relevant information

1. Management and communications
   1. Please use this section to describe how you envisage working with the Health Foundation and the other stakeholders in this work. Additionally, please give details of how you will ensure we are kept informed of the project's progress

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* 1. Please provide a project management plan.
  2. Please consider any risks in relation to the proposal and how you will mitigate against these.

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1. Details of team members
   1. Please provide details of the key members of your team who will be working on the programme of work. Please copy the table below to include additional team members.

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| --- | --- | --- | --- |
| Name | **Title** | **First Name** | **Last Name** |
| Relevant experience for this project |  | | |
| Roles and responsibilities on this project |  | | |

|  |  |  |  |
| --- | --- | --- | --- |
| Name | **Title** | **First Name** | **Last Name** |
| Relevant experience for this project |  | | |
| Roles and responsibilities on this project |  | | |

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| Name | **Title** | **First Name** | **Last Name** |
| Relevant experience for this project |  | | |
| Roles and responsibilities on this project |  | | |

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| --- | --- | --- | --- |
| Name | **Title** | **First Name** | **Last Name** |
| Relevant experience for this project |  | | |
| Roles and responsibilities on this project |  | | |

1. Resources

We require full costing of your proposal. Please fill in the budget template and submit it alongside this application.

The Health Foundation wishes to maximise the return it provides to beneficiaries and obtain best value from external suppliers.

* 1. What is the total cost of your proposal? Please include VAT in your costing.

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* 1. Please provide full justification for your costs, including the time spent on the project by each member of your team and all other relevant costs.

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1. Supplier references

Please note that if you/your organisation has not worked with THF before we will be contacting your references if you are shortlisted for interview or if you are the only supplier.

Name, address, phone number and email address of first referee:

Name, address, phone number and email address of second referee:

1. Contract
   1. Do you agree to all the terms and conditions in our Sample contract (attached alongside this document)? If not, please give details.

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Signed on behalf of the organisation:

Name:

Position:

Date: