

Invitation to Tender

Evaluation of the Economies for Healthier Lives programme

July 2021

Prepared by

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Deadline date: 12pm GMT, 13 August 2021

Attached documents include:

- [Budget template](#)
- [Sample commission contract](#)
- [Sample tender response form](#)
- [AIMS user guide](#)

Summary

This invitation to tender (ITT) is seeking an evaluation partner to undertake a formative and process evaluation of the Health Foundation's Economies for Healthier Lives (EHL) programme. The programme will be delivered over a three-year period from September 2021 to late 2024. This innovative programme will support up to four local and regional partnership projects across the UK for up to 3 years, including the set-up phase.

Through the EHL programme, we will support local and regional partnerships to implement some of the ideas in our recent report *Using economic development to improve health and reduce health inequalities* by integrating economic development activity with work to improve health and/or reduce health inequalities.

The evaluation partner will lead on the delivery of a formative and process evaluation at programme level. We are interested in gaining a better understanding of how to embed economic development strategies to improve health and reduce health inequalities, rather than assessing the effects of specific interventions. The evaluation will provide a better understanding of which system levers can be changed to build or influence economic interventions which aim to reduce health inequality; and explore what support is helpful to enable this change, and what the barriers are. The evaluation provider will work with the local and regional partnerships, funder and learning support provider to collect and synthesise learning on the effectiveness of the programme to support the Health Foundation regarding future work in influencing how economic development can better contribute to public health.

Through a separate process, the Health Foundation is also commissioning a learning support provider to work with the projects.

The evaluation partner will be expected to develop good relationships with the local and regional partnership projects, and the learning support provider, to synthesise the findings from the local partnership projects, and share emerging findings, best practice, and emerging evidence. The evaluation partner will assess the overall effectiveness of the programme in developing mechanisms to embed economic development strategies to improve health and reduce health inequalities.

Proposals will be assessed using several criteria: skills and expertise in programme evaluations; knowledge of health and economic development; appropriateness of proposed methods; demonstrable capacity to deliver the evaluation(s) on time, on budget and to the required standard, with proven ability to flex resource capabilities and adapt to changing environments where required; ability to work collaboratively with a range of stakeholders; appropriate project management, risk management and quality assurance expertise; and value for money.

A pre-recorded webinar will offer prospective applicants the opportunity to hear more about the programme. This video will be available to watch on the application page of our website from 22 July, offering applicants the opportunity to hear more about the programme and ask questions to clarify understanding.

The evaluation partner will be selected in September 2021, to commence work the same month. We expect the programme to end in late 2024. The final evaluation report will be due three months after the end of the last project.

We anticipate bids of up to a maximum of £200,000 (inclusive of VAT and expenses).

Your tender should be completed using a tender response form on our online portal, AIMS (aims.health.org.uk). A PDF form is included as an example, but do not use this to submit your application – this can only be done online via AIMS. The form should be completed by 12:00 (midday) on 13 August 2021.

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.

2. Background to the Economies for Healthier Lives (EHL) Programme

The Health Foundation's Healthy Lives strategy aims to bring about improvement in the health of people in the UK through a focus on the wider determinants of health and mobilising action across sectors. People's economic circumstances including their income level, job quality, wealth and pay have a strong influence on their opportunity to live a healthy life. As a result, economic development strategies can be powerful mechanisms to improve health and reduce health inequalities.

Local authorities have a critical role to play in both improving health and leading local economic development activities. However, many opportunities to use economic development to improve people's health are missed because economic development and public health strategies tend to be designed separately.

The COVID-19 pandemic has highlighted the strong links between the economy and health. As the country rebuilds the economy post-pandemic and 'levels up' UK regions, there is an opportunity to create more inclusive economies and sustainable economic development, geared towards reducing inequalities and improving health, as set out in our recent report, [Using economic development to improve health and reduce health inequalities](#). The EHL programme offers a unique opportunity for local and regional partnerships to put some of the ideas from our report into action.

3. Objectives of the Economies for Healthier Lives Programme

The objectives of the EHL programme are to:

- a) improve the capacity and capability of economic development and public health professionals (in local or regional authorities) to take joint action to use economic development to improve health
- b) develop a better understanding of the mechanisms through which economic development interventions affect health outcomes
- c) support the development of metrics to monitor the health impacts of economic development interventions
- d) build understanding of how to translate the existing evidence base of how economic development strategies that promote inclusive economies can improve people's health and reduce health inequalities into practical action
- e) capture learning from the programme to be used to inform and change practice across the UK through wider dissemination by the Health Foundation.

4. About the Economies for Healthier Lives Programme

The EHL programme will support up to four partnerships across the UK to work towards the programme aim: to strengthen relationships between economic development and public health.

In November 2020, we invited local and regional partnerships to submit an expression of interest for the programme and we received more than 80 applications from across the UK. We invited nine partnerships from the expression of interest phase to submit a full application for the programme by Friday 4 June 2021.

Following final selection in July 2021, the successful partnerships will each receive:

- grants of up to £500k in total, across three years, to support economic development projects that seek to improve health and reduce health inequalities
- access to a tailored support package provided by the learning support provider commissioned by the Health Foundation; this support could include technical expertise and coaching
- a programme of activities, including regular events, to help build a supportive community and share learning between partnerships.

We plan to award the funding to the successful partnerships in July/August 2021 and will expect the partnerships to start their six-month set-up phase between September 2021 and February 2022.

Each award will run for up to three years, including the set-up phase. Therefore, we expect the programme to end in late 2024. The programme end date will be confirmed once the start and end dates for each award have been agreed.

As well as financial support, the Health Foundation will work with a learning support provider to provide the project teams with a bespoke package of support.

The learning support provider will:

- collaborate with each partnership between September 2021 and February 2022 to understand their needs for support in their set-up phase and in implementing their projects
- co-produce a support model with each partnership in collaboration with the Health Foundation, with models to be reviewed and agreed in March 2022
- coordinate the delivery of the support models, working with additional suppliers where their expertise is necessary
- design and lead mechanisms for peer support and learning across the partnerships
- collaborate with the partnerships and the Health Foundation to review and adjust the support delivered to the partnerships throughout the programme
- contribute to programme-level activity, including designing and delivering events, capturing learning and developing an Economies for Healthier Lives community.

The learning support provider will also work collaboratively with the evaluation partner for the EHL programme and the core team at the Health Foundation.

It will be important to understand what data the learning support provider is collecting, and whether further analysis would be helpful, avoiding duplication of effort. Our evaluation partner will want to understand what data is already being collected by the partnerships and/or collated centrally by the learning support provider and how this can feed into the evaluation. The evaluation will try to minimise the burden of data collection on all partners; and share data and learning as appropriate.

5. Economies for Healthier Lives partnerships

The partnerships will be led by a local authority or a statutory regional body and will bring together a range of organisations, including an academic partner and specialist partner, to implement the chosen intervention in their locality. The specialist partner will bring additional topic experience or experience in the specific area targeted by the project and could, for example, be a voluntary and community sector organisation, a business or national stakeholder organisation. The partnerships may also include a number of other partners. There are no restrictions on the number or types of organisations that can be involved; each partnership will be set up in a way that supports the most appropriate and efficient delivery of their project.

The fundamental requirement of the partnerships is that they take a collaborative approach to improving health and/or reducing health inequalities through collective approaches to economic development. Partnership plans will include joint working across public health and economic development functions. Where public health teams sit outside the local authority, the relevant national and/or local public health organisations will be involved in the partnership.

The involvement of an academic partner is intended to bridge the gap between research and implementation in this field. The primary focus of the academic partner is to contribute expert knowledge in supporting the partnership with implementation, metric development and evidence gathering. The academic partner will also play a critical role in supporting real-time learning and building longer-lasting relationships with the other partners. The role of the

academic partner is to support the partnership to strengthen the use of evidence within projects rather than to evaluate their effectiveness.

We expect a portion of the funding to be used to support meaningful public involvement. This engagement should go beyond existing consultation mechanisms. Partnerships will focus on implementation of their plans in the local context, using co-production principles to ensure that the process has meaningful public involvement.

Each partnership is expected to have a six-month set-up phase, which may include activities such as recruiting core staff, setting up governance structures, agreeing ways of working with partners, and developing the approach for how their partnership will work to implement the project and achieve the programme aims. The partnerships will also need to be formalising their milestones and timelines for the whole funding period during their set-up phase; with the learning support provider helping support the partnerships with their planning. We would expect partnerships to be ready to launch locally at the end of the six-month set-up phase.

6. Details of the work

6.1 Aim of the programme evaluation

The purpose of this formative and process evaluation is to:

- Identify mechanisms that facilitate or obstruct the development and sustainability of partnerships between health and economic development to improve health and reduce health inequalities at local authority or regional level.
- Provide a better understanding of which system levers can be changed to build or influence economic interventions which aim to reduce health inequality and explore what support is helpful to enable this change (for example, introducing impact assessments into decision-making), and what the barriers are.
- Understand how the programme is meeting its objectives and what the lessons are for the Health Foundation regarding future work in influencing how economic development can better contribute to public health. The evaluation partner will feed findings from the ongoing formative evaluation into the programme team regarding any potential live improvements to the running of programme. The evaluation partner will identify the effective mechanisms developed through the programme, how practice has changed as a result of the programme and understand how these insights should shape future Health Foundation work in this area to extend its impact.
- Draw out lessons from both the design and delivery of the programme, especially how the partners each contribute to the projects, as well as broad insights on core principles and elements which could be applied in other contexts.

We are looking for programme-level insights, rather than at the individual project level, as we expect those to be covered by the partnerships' academic partners. The design of the evaluation will need to take into consideration how it draws programme-level learning from across each of the sites and works with the academic partners to ensure project-level learning feeds into the programme evaluation.

6.2 Evaluation questions

The evaluation of the EHL programme will answer the following questions:

Indicative project-level questions

The evaluation partner will work with academic partners to ensure that these project-level questions are answered and to feed the lessons into the programme evaluation. There will be scope to adapt project-level questions around specific projects, recognising the range of projects. It will be important that project-level questions generate insights to address programme-level questions.

1. How effectively are the local projects managing to develop partnerships and collaboration between economic development and public health professionals; and academics and specialists; and how effectively are they involving the public and local communities (particularly in terms of diversity and inclusion of underserved communities)?
More specifically:
 - What are the mechanisms of effective collaboration between the partners?
 - What are the barriers and enablers of effective collaboration between the economic development and public health partners?
 - Are the partnerships likely to continue after the three-year funding period, and why/why not?
2. How are the projects delivering change on the ground?
 - Are the right partners involved to achieve system change?
 - What metrics are being used and how are they informing decision making?
 - How are systems adapting?
3. How is the programme helping teams on the ground think – beyond the project teams themselves – differently about economic development and how they are working differently. What are the project teams doing differently as a result of the programme? More specifically:
 - How are they adapting the programme and their approach over time?
 - Why have they adapted their approach?

Indicative programme-level questions

4. What new insights about how to build capacity and closer working between public health and economic development at a local and/or regional level is the EHL programme generating?
More specifically:
 - What skills and capabilities are required of economic development and public health professionals to collaborate effectively?
 - What mechanisms help to embed economic development strategies to improve health and reduce health inequalities?
 - What processes or outcome metrics are developing to monitor the impacts of economic development interventions on health and health inequalities?
 - To what extent are the partnerships helping to build an understanding of how to translate the existing evidence base of how economic development strategies that promote inclusive economies improve people's health and reduce health inequalities into practical action, and what mechanisms are being used?
5. What resources and conditions are supporting the projects to meet their objectives, and conversely, what is missing?

6. How are wider stakeholders external to the programme (eg regional departments of public health) engaging with the programme and how do they perceive the strengths and weaknesses of the programme?
7. What are the lessons, including unintended consequences, of the programme for funders and wider stakeholders?

The evaluation will focus on understanding the mechanisms for successful partnerships, contributing to the evidence base for how health and economic development professionals can work together to improve health and reduce health inequalities.

A summary of the shortlisted projects will be provided at the webinar on 22 July, and the successful bidder will be provided with full details of the successful projects on award of contract.

6.3 Approach and methods

The evaluation partner will need to maintain a flexible approach to the delivery of this evaluation for the duration of the programme. This will be particularly important in the early stages of the evaluation, as some projects will be starting from different points and are likely to develop at different paces. The selected projects are expected to vary in terms of partners, focus, scale and coverage.

The evaluation should explore how the EHL programme is being delivered on the ground, and what works in the set-up and implementation of this partnership approach between health and economic development. This will be done through capturing evidence of the experience and learning of those involved in the EHL programme about what is contributing to bring about change locally. It should also identify the core elements of the approach which could be applied in other contexts.

It is anticipated that the successful evaluation partner will work collaboratively with the core team at the Health Foundation and the learning support provider during the initial phase of the evaluation to develop appropriate evaluation tools. During the first six months of the programme, the evaluation partner will be expected to:

- update the programme theory of change and develop an evaluation framework which outlines the scope, feasibility and appropriate data to be collected
- develop a firm understanding of each partnership project's plans and working theories of change
- form a good working relationship with each of the partnership projects, and the learning support provider
- formally agree ways of working with each of the partnerships through a concordat or similar; these will be informed by the set of principles agreed at the outset between the Health Foundation, the evaluation partner and the local partnership projects.

To do this, the evaluation partner will be expected to join a workshop with each of the partnership project teams (ie four workshops).

The scope of the evaluation will be finalised in spring 2022. In the set-up period, for both the evaluation partner and the learning support provider, the Health Foundation will agree and

clarify ways of working across the programme. The learning support provider and the evaluation partner will need to coordinate any site visits and interviews to ensure efficient use of time. The learning support provider will contribute to the programme evaluation by sharing insights and learning from across the partnerships. They will be expected to develop a close relationship with the evaluation partner for the programme.

The data collection and analysis for the evaluation should be structured around the theory of change, which represents the programme theory and illustrates the pathways thought to be operating in the intervention. A working version is in the Appendix, which will need to be updated by the evaluation partner.

A stage gate review of the evaluation will take place at the end of the set-up phase. Continuation of funding will be dependent on satisfactory progress and delivery against the agreed deliverables as assessed by the Evaluation, Learning and Knowledge Mobilisation working group, in consultation with the Programme Advisory Group.

We envisage that the evaluation will incorporate the following design principles:

- A robust methodology and framework which addresses the primary goals of the evaluation.
- A feasibility assessment during the scoping phase.
- Ability to work with the Health Foundation, the learning support provider and the project sites and any stakeholders.
- An evaluation team who can work closely with the Health Foundation and maintain a flexible approach to delivery as the project sites develop, particularly in the early stages of the evaluation, as some partnerships will be starting from different points and are likely to develop at different paces.
- Regular communication and liaison with local partnership projects and the learning support provider, which will include agreeing and ensuring linkages with any local-level evaluation frameworks and data collection plans.
- Stakeholder engagement – joining the Health Foundation team for (up to six) meetings with key stakeholders that may be necessary, to add to the debate about the findings, and/or to test and validate the findings.

7. Working with the Health Foundation

The work will be managed by a Research Manager at the Health Foundation (the 'Client'), with strategic and content input provided by the Programme Manager.

The Research Partner will be the main point of contact for the evaluation partner and will monitor progress on the contract through regular phone calls or emails. The Research Manager will ensure the evaluation partner is kept up to date about programme developments. Where at all possible, the Health Foundation takes a partnership approach to its work.

- We will work with the chosen evaluation partner to confirm the design of the work before the work begins.

- At the inception meeting, we will work with the successful provider to refine the proposed approach, establish a suitable governance structure and evaluation questions and design, and agree on the ways that we will work in partnership.
- We will work with the evaluation partner to ensure the evaluation framework is appropriate.
- We will work with the evaluation partner to agree the structure of the interim reports and provide feedback on drafts.
- We will work with the evaluation partner to identify and address challenges that emerge for the duration of the programme.

The programme evaluation partner will be an integral part of the programme governance structure (see Appendix B).

- An Evaluation, Learning and Knowledge Mobilisation (KM) Working Group will meet every month for six months and then every two months. This will be composed of key members of our in-house Research and Programme teams, who will work alongside the successful evaluation partner to design the evaluation framework. This will be followed by a review and discussion at the first Evaluation, Learning and KM Working Group meeting during the set-up phase.
- The evaluation partner will also contribute to the Programme Advisory Group (for example, to provide evaluation updates or to flag issues raised by the evaluation partner).
- We will want to meet or speak with the evaluation partner regularly, but we will agree the nature of updates with the provider at the inception meeting. In the first six months, we anticipate holding monthly evaluation meetings either in person or virtually, before moving to meeting every two months.

Time and capacity for these activities should be factored into the budget.

8. Deliverables

- Draft framework for the evaluation which identifies data sources, data permissions, research tools, feasibility and frequency of data collection. The framework should also take into consideration any piloting required for the research tools.
- Final framework for the evaluation.
- Updated programme theory of change.
- Concordats on ways of working with each partnership.
- Year 1 and Year 2 learning reports. These should contain updates on progress, challenges and emerging themes of the programme.
- Update and attendance at Programme Advisory Group meeting every six months.
- Attendance at up to six events over the course of the evaluation.

- Attendance at the launch event in September 2021 and a presentation at the programme close event in early 2024.
- A final report that synthesises key findings. This report will provide an overarching narrative of the programme to understand the nature of establishing partnerships between health and economic development to improve health. The final report should connect to the programme aims as outlined above and be written to a high standard.
- We will also expect the evaluation partner to join us for any stakeholder engagement events, such as roundtable meetings with key system leaders and decision makers, that may be necessary, to add to the debate about the findings, and/or to test and validate the findings.

9. Audiences for this work

The primary audience for this evaluation is the Health Foundation, the Economies for Healthier Lives Programme Management Team, and the four funded partnerships (see Appendix B). The Programme Management Team provides operational oversight of the EHL programme. The Terms of Reference for the Programme Management Team are being reviewed.

The Health Foundation will work closely with the evaluation partner to develop key messages and to draw out the implications of the findings, and any communications and public affairs (including media) related to the evaluation and its findings.

We will work with the evaluation partner to consider different presentational options for the different audiences. We are keen to ensure that the development process of this work supports our wider stakeholder engagement work. At programme level, the evaluation partner alongside the learning support provider will work with the Health Foundation to capture learning in the development of an Economies for Healthier Lives community. Wider stakeholders interested in this evaluation and its findings may include:

- Similar organisations/teams as those who make up the partnerships and might look to do similar work in the future (including local authorities, directors of public health, regional public health teams, economic development professionals, voluntary and community sector organisations, and academia).
- Policymakers and funders.

Our aim in terms of dissemination is to provide outputs that are useable by those in policy and practice who are research literate but time poor. We may, therefore, commission an independent writer or our in-house team to produce a Health Foundation learning report based on the evaluation partner's evaluation report. In such an instance, we expect our evaluation partner to work with the writer to provide insight into the key findings, and feedback on early drafts of the learning report.

Alongside the learning support provider, the evaluation provider will attend and contribute learning to the programme steering group as and when required. We will also expect the evaluation partner to join us for any stakeholder engagement events, such as roundtable meetings with key system leaders and decision-makers, that may be necessary, to add to the debate about the findings, and/or to test and validate the findings.

Please ensure that your proposal makes reasonable allowance for the time required to fulfil these obligations regarding dissemination throughout the duration of the evaluation.

10. Key dates

For the tendering process

Milestone / activity	Date(s)
Release of ITT	5 July
Webinar	22 July
Deadline for submissions	13 August
Interviews and selection	15 September
Project inception meeting	w/c 20 September

For the EHL programme evaluation

Milestone / activity	Date(s)
Partnership awards made: successful partnerships notified and award agreements prepared and signed	July/August 2021
Partnership projects start: partnerships start their six-month set-up phase	September 2021
Programme evaluation planning: programme evaluation partner to plan ways of working and the programme evaluation framework and refine the working theory of change	Sept 2021–February 2022
Workshops with partnerships: series of meetings between each team, learning support provider, programme evaluation partner and the Health Foundation	Sept 2021–February 2022
Programme launch event: hosted virtually or at the Health Foundation	March 2022
Final evaluation framework and updated theory of change	March 2022
Concordats on ways of working with each partnership	March 2022
Year 1 learning report	September 2022
Year 2 learning report	September 2023
Programme celebration event: end-of-programme event hosted at the Health Foundation	September 2024
Final evaluation report	October 2024

11. Intellectual property

In commissioning this evaluation, the Health Foundation will own the intellectual property generated (please see the intellectual property clause in Schedule 6 of the sample contract).

12. Costs

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.

Based on previous similar work commissioned by the Health Foundation, we anticipate bids of up to £200,000 (inclusive of VAT and expenses).

We will commission this evaluation by issuing a contract for services and, as such, we expect VAT is likely to be payable on all aspects of the work. Please consult your contracting team and/or finance team to ensure that VAT has been included appropriately before submitting your proposal and budget.

We are currently planning on the basis of funding up to four partnerships. Please budget for four partnerships for the purposes of the tender but explain how you might re-distribute resources if there were only three. In addition, there may be options to increase the number of partnerships we fund. It would be helpful to give an indication within your tender as to how you might scale up proposals and/or likely cost increases for an additional partnership.

13. Webinar

A pre-recorded webinar will offer prospective applicants the opportunity to hear more about the programme. This video will be available to watch on the application page of our website from 22 July.

If you would like to ask any questions that might be covered as part of the pre-recorded webinar, please email us at EconomiesHLeval@health.org.uk by midday on 16 July. Please note that we will not be able to answer specific technical questions about individual tender responses.

We will also produce a FAQ document, which we will regularly update until the ITT closes.

The webinar will offer applicants the opportunity to hear more about the programme and ask questions to clarify understanding. You are strongly encouraged to watch the webinar.

14. Tender response requirements

Providers are requested to complete the Health Foundations tender response form on the AIMS system in presenting their response. A PDF form is included as an example – do not use this to submit your application, this must be done online.

Detailed provider information must be provided, such as:

- 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.

The tender response must include confirmation of how you will meet the requirements of the tender, including:

- Summary of your proposed approach.
- 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 a Gantt chart outlining the key dates, milestone and deliverables against each phase/workstream.
- Any other relevant information the Health Foundation should take into account.
- 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.
- 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.

15. Instructions for tender responses

The Health Foundation reserves the right to adjust or change the selection criteria at its discretion. The Health 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.

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 Health Foundation as offers to enter into an agreement. The Health 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.

The Health 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.

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

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

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

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

16. Selection criteria

The successful provider will need to maintain a flexible approach throughout the evaluation and will be responsible for delivering all aspects of the evaluation, including developing the evaluation framework, and obtaining relevant authorisations and approvals where applicable. The provider will work with the Health Foundation to collect all relevant data, design and carry out the evaluation and analyses, and complete interim and final reporting.

This is likely to require an evaluation team with demonstratable experience in:

- conducting formative and process evaluations, as well as the ability to develop and disseminate knowledge, learning and evidence in a clear and compelling way
- developing effective working relationships with a wide range of stakeholders, as well as a strong understanding and experience of evaluating complex interventions
- interest in, and knowledge of, health and economic development.

The successful provider must ensure that they have both adequate capacity and resources in place in order to deliver a robust, timely evaluation that will be complex in nature.

We are looking for appropriate methodological approaches for research and evaluation being designed and delivered in the context of the ongoing situation regarding COVID-19. We welcome bids which draw on a range of methods, backgrounds and expertise, and from a single team or a consortium of evaluators. In the latter case, we would anticipate there being a lead evaluation partner who would take overall responsibility for the delivery of the contract. Proposals should describe in detail how these arrangements would be managed.

The successful evaluation partner should be able to describe how they would address key evaluation questions through a diverse range of methods, particularly where data are likely to be accessible at different times. The successful provider will also be able to clearly demonstrate how they will maintain a flexible approach regarding timescales and to working with partners, and how they will manage risks.

Please specify how the proposed approach this will ensure data protection by design and comply with relevant data protection legislation. Please also include your assumptions on the data processing relationship (ie data processor and data controller) between the provider and the Health Foundation.

As part of the contracting process, a Privacy Impact Assessment will need to be completed by the Health Foundation and approved by the Data Protection Officer before the contract can be issued.

Requirements:

- Skills and expertise in relevant programme evaluation approaches and techniques.
- Knowledge or awareness of health and economic development.
- Understanding of systems approaches to change.
- Appropriateness and feasibility of the evaluation methods, avoiding duplication and overburdening partnership projects and the learning support provider.
- Appropriate project management, risk management, information governance and quality assurance expertise.
- Demonstrable capacity to deliver the evaluation on time, on budget and to the required standard, with proven ability to flex resource capabilities and adapt to changing environments when required.
- Ability to draw on other expertise if needed, and to work collaboratively with a range of stakeholders.
- Strong communication skills.
- Value for money.
- Willingness to attend in-person/online events as appropriate.
- Appropriate data protection measures.

It is important to the Health Foundation that the chosen evaluation partner 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.

17. Selection process

Please complete the online tender response form on the AIMS system **by 12:00 on 13 August**. We will not accept proposals submitted after this time.

Please read the AIMS user guide before starting to complete the form. This is available on our website and via the online form on AIMS.

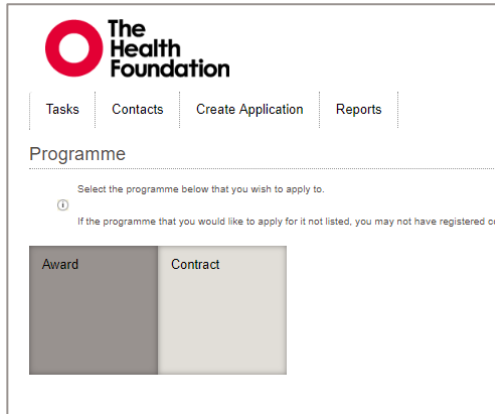
AIMS quick start

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.

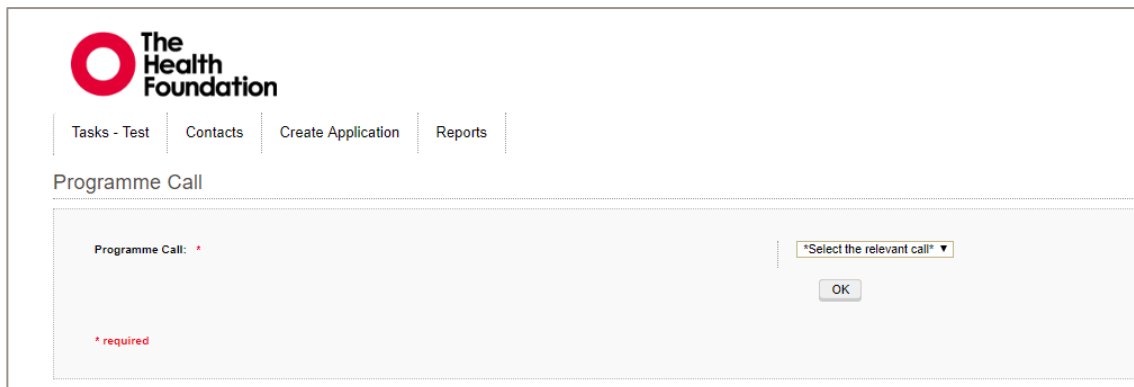
Open tender instructions

Select the 'Contract' programme, as shown below.



The screenshot shows the 'The Health Foundation' logo at the top left. Below it are navigation tabs: 'Tasks', 'Contacts', 'Create Application', and 'Reports'. The 'Create Application' tab is active. Underneath, the heading 'Programme' is followed by instructions: 'Select the programme below that you wish to apply to.' and a note: 'If the programme that you would like to apply for it not listed, you may not have registered cor...'. Two buttons are visible: 'Award' (dark grey) and 'Contract' (light grey). The 'Contract' button is highlighted with a white border, indicating it is the selected option.

On the next screen, click into the drop-down menu and select the *Summative evaluation of the Flow Coaching Academy programme* in the drop-down for 'Programme call', as shown.



The screenshot shows the 'The Health Foundation' logo at the top left. Below it are navigation tabs: 'Tasks - Test', 'Contacts', 'Create Application', and 'Reports'. The 'Create Application' tab is active. Underneath, the heading 'Programme Call' is followed by a form field labeled 'Programme Call: *'. To the right of the field is a drop-down menu with the text '*Select the relevant call*' and a downward arrow. Below the drop-down menu is an 'OK' button. A red asterisk and the text '* required' are visible at the bottom left of the form field.

We will aim to respond to your application by the end of 10 September 2021.

We intend to interview a selection of shortlisted bidders on **15 September 2021** to explore proposals in more depth. Please ensure you are available to be interviewed on this day.

The start date is to be agreed following the final decision, but we intend to have an inception meeting with the chosen evaluation partner within two weeks of the interview.

18. Confidentiality

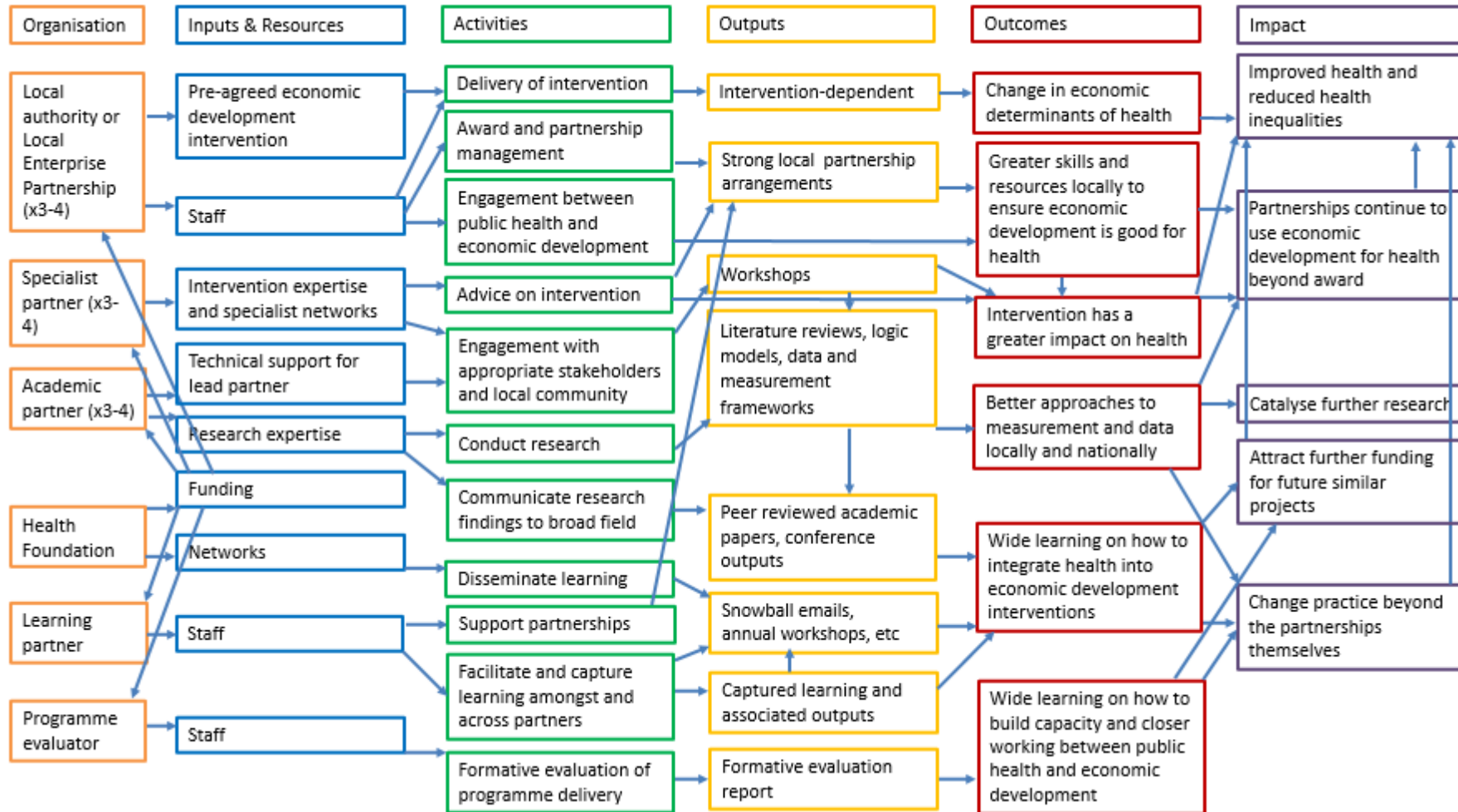
By reading/responding to this document, you accept that your organisation and staff will treat the information as confidential and will not disclose to any third party without prior written permission being obtained from the Health Foundation.

Providers may be requested to complete a non-disclosure agreement.

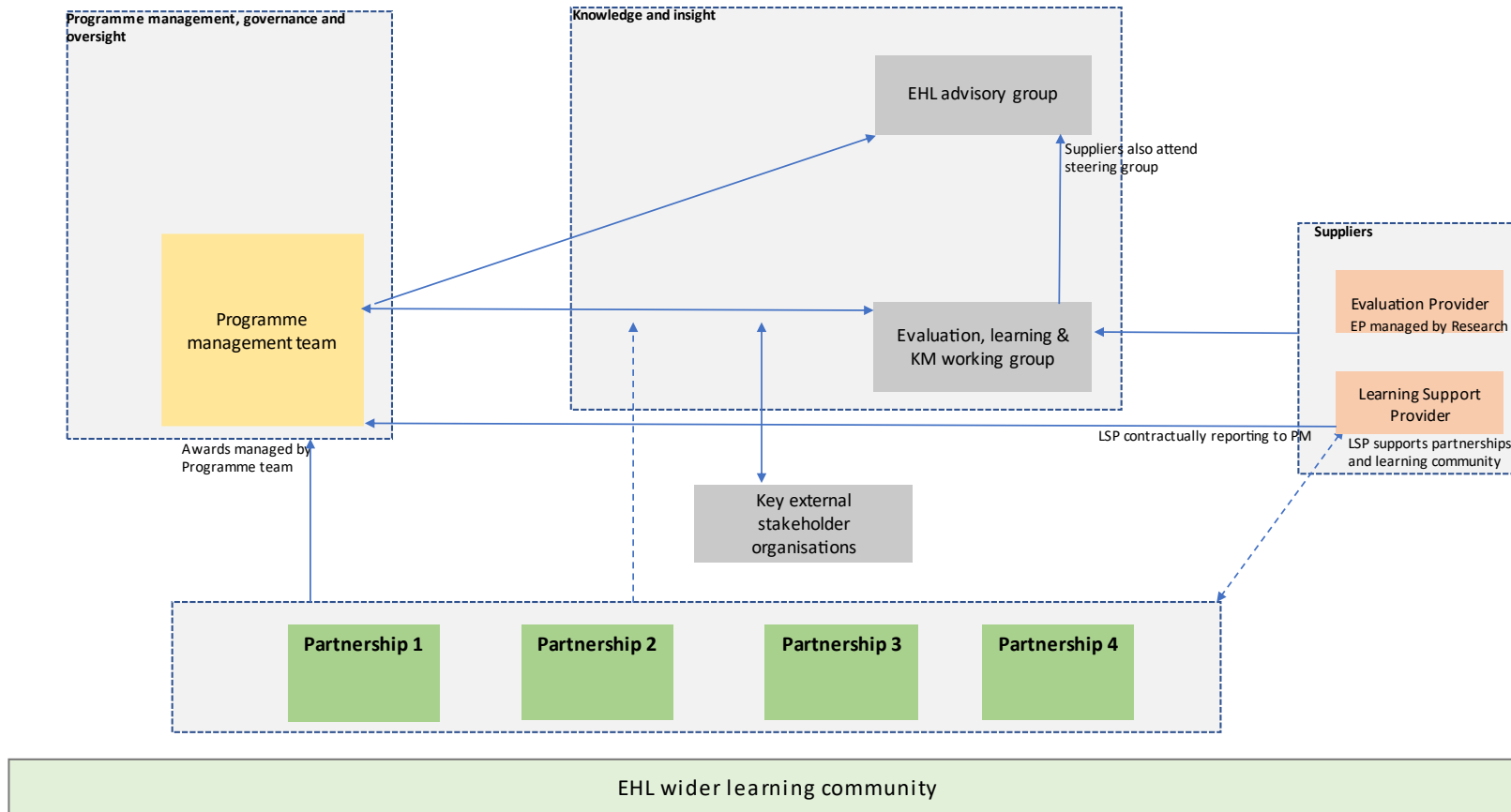
19. Conflicts of interest

The Health 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 Health 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 Health Foundation's website at: <https://www.health.org.uk/COI>

Appendix A: Working Theory of Change: Economies for Healthier Lives Programme



Appendix B: Governance structure



The partnership: The partners involved in delivering the Health Foundation funded project.

Local authority: The local authority as the lead partner will be responsible for convening and leading the development of the partnership, sub-contracting other partners and leading the application process.

Academic partner: The involvement of an academic partner is intended to bridge the gap between research and implementation in this field. The primary focus of the academic partner is to contribute expert knowledge in supporting the partnership with implementation, metric development and evidence gathering. The academic partner will also play a critical role in supporting real-time learning.

Specialist partner: The specialist partner will bring additional topic experience or experience in the specific area targeted by the project. The specialist partner could be, for example, a voluntary and community sector organisation, a business or a national stakeholder organisation.

Health Foundation: We will make grants to the lead local authority and commission the learning support and external evaluation. We will make links with national policymakers and will seek to develop and maintain relationships between policy and practice. We will also help to disseminate learning from the programme.

Learning support provider: The learning support provider will produce a tailored package of learning and development support to partnerships. The learning support provider will organise and facilitate opportunities for broader learning.

External evaluator: The evaluation partner will work with the partnership, funder and learning support provider to collect and synthesise learning on the effectiveness of the programme, to support the Health Foundation in future decision-making about this area of work.