

Invitation to Tender

Policy polling programme (2021-23)

August 2021

Deadline date: midday, 24 September 2021

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The associated documents to read alongside this Invitation to Tender include:

- **Sample tender response form**
- **Sample contract**
- **Budget template**
- **AIMS user guide**

1.0 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.

This programme is being led by the Health Foundation's Policy team, who work to analyse, understand, and inform national policies to support effective, evidence informed health policy and strengthen health system performance.

2.0 Background and purpose

The COVID-19 pandemic has had a major impact on public perceptions of, and priorities for, health and social care. Since 2020, the Foundation has commissioned a range of research into public attitudes to inform and enrich our in-house research and analysis.

This included **three rounds** of public polling in 2020 to gain insights into changing public perceptions of health and social care during the pandemic, which spanned a range of themes, including the public's views on use of health care services, the government's handling of the pandemic, and the social and economic impacts. The findings from this research placed us in a unique position to inform policy discussion and debate in 2020, providing the Foundation with an important mechanism to assess the public mood during the pandemic and influence a wide range of political and policy figures.

More widely, our work on the **use of technology** to access health care during the pandemic was enhanced by research into the public's experiences. And our **COVID-19 impact inquiry** into the factors that influenced the devastating death toll in the UK also used polling to understand public attitudes towards health inequalities and the extent of support for government action to address differences in health outcomes.

The years ahead are set to bring further changes that may meaningfully affect public perceptions, priorities and experiences, such as:

Short term (6-12 months)

- Endgame of the acute phase of the pandemic
- Possible winter crisis from flu and COVID-19
- Wider consequences of pandemic starting to become clearer

Medium term (1-5 years)

- Transition to new public health system
- Major NHS reforms via new Health and Social Care Bill
- White paper to set out levelling up agenda

- Government fulfilling (or not) repeated pledges to ‘fix social care’
- Critical decisions about public spending and borrowing post-pandemic
- Public inquiry into handling of COVID-19 – hearings, report, response
- General election due by 2024 – but potentially sooner

Longer term (>5 years)

- Changing expectations of health and social care services
- Changing attitudes towards health, care and the role of the state
- Emerging issues e.g. technology, data, environmental sustainability

This programme of research aims to build on our previous polling to understand how, if at all, public perceptions are shaped by these changes, and to generate insights into public attitudes to influence key policy decisions in these areas. This research will be an important input into our ongoing work on health policy analysis and influencing over the next two years.

3.0 Aims and objectives

The Health Foundation is looking for a supplier with a strong track record in public polling and public engagement research in health and health policy to deliver a programme of research over the next two to three years, with the potential to build a longer-term relationship with us beyond the period covered by this contract.

The aim of the programme is to produce high-quality, timely, public polling and research, with an explicit focus on generating insights around public attitudes to health and social care, the government’s handling of the NHS, and wider health policy issues. The supplier will achieve this by:

- delivering four demographically representative polls with the UK general public at six monthly intervals
- scoping and delivering additional polling and research (quantitative or qualitative) as requested
- working with us closely and flexibly to generate insight and to publish the findings.

4.0 Overview of the work required

We want to establish a flexible framework agreement with the successful supplier consisting of core polling activities guaranteed as part of this contract (block 1) and optional additional research services that we can request on an ad-hoc basis (block 2).

<p>Block 1: Confirmed polling activities</p> <p>(Value up to £260k inc VAT)</p>	<p>To conduct four biannual polls with a nationally representative sample of the general public of England, Scotland, Northern Ireland and Wales.</p>
<p>Block 2: Optional activities</p>	<p>To conduct, on an ad-hoc basis and at our request:</p>

(Value dependent on nature of work requested but not likely to exceed 65k inc VAT)	<ul style="list-style-type: none"> - additional polling e.g. to update results ahead of a major event, or - other research (quantitative or qualitative) or deliberative public engagement to understand public views on a particular topic in more detail.
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4.1 Block 1: Confirmed polling activities

The core activities to deliver as part of this contract are four biannual polls with a demographically representative sample of the general public of England, Scotland, Northern Ireland and Wales.

Approach and sample

While our previous polling has used face to face or telephone-based polls, we are aware of alternative methods (for example random probability panels to address sampling biases in standard online polling) and are open to different approaches capable of delivering a high quality, representative sample of the general public. The sample size should be large enough to do some statistically significant breakdowns of results by demographic groups or other attributes.

In the past, we have highlighted breakdowns of results by standard demographic groups including age, ethnicity (white and BAME), socio-economic status and level of formal education. However, we have also included some non-standard variables such as whether participants have a disability, voting intention and whether participants live in areas covered by local lockdowns, among others. We have valued this flexibility and anticipate looking to take a similar approach, depending on the nature of the topics included in each survey.

We are interested in capturing the following demographic information as a minimum:

- Gender
- Age
- Socio-economic status
- Ethnicity
- Government Office Region
- Use of NHS in last 12 months
- Use of social care in last 12 months
- Voting intention

In addition, we are interested in capturing:

- Whether the respondent, their family, or friends works for the NHS
- Type of NHS services recently used

We are also interested in having scope to include other non-standard demographic variables that could be used to breakdown the results. This would be by agreement with the successful supplier when appointed, and heavily influenced by the supplier's advice and expertise on what is feasible and likely to produce meaningful evidence.

Topics and survey questions

The format of the biannual polls is intended to be a mix of tracking questions to be repeated over time, together with space for topical questions that reflect some of the key issues or concerns at the time of each survey.

We would expect to co-produce the definitive set of questions with the successful supplier when appointed, and will be expecting the supplier to use their expertise and experience to make a substantial contribution to the process of agreeing topics and survey questions.

An indicative list of potential topic areas is listed below:

- overall satisfaction with the running of the NHS
- perceptions of the biggest problems facing the NHS
- whether the government has a good plan for the NHS
- optimism and pessimism about the NHS – last 12 months and the next 12 months
- the biggest priorities for the NHS
- whether the government should support the founding principles of the NHS – universal, comprehensive and free at point of use, based on need not ability to pay, etc.
- preferences for receiving NHS-funded treatment by an NHS, private or not-for-profit health care provider
- expectations of health and social care
- spending priorities within public services and within health
- support for increased spending on the NHS/social care/health
- views on emerging long-term issues e.g. technology, environmental sustainability, etc.
- views on social care funding and reform e.g. fairness of means testing, the acceptability of people having to use some of the value of their home to fund care, etc.
- the role of the state in health and inequalities e.g. views on the extent of the state's responsibility for ensuring people are generally healthy, attitudes towards government intervention to improve the health of the population or address health inequalities, etc.
- support for specific policy interventions to improve public health e.g. tobacco control, salt/sugar taxes, restrictions on advertising junk food to under 18s, etc.
- attitudes towards health, social care and the role of the state.

On issues where public opinion is most likely to evolve and change most rapidly in response to the external environment, we would aim to repeat questions in every survey, i.e. once every six months. On issues where opinion is likely to change more slowly, we would look to include the relevant questions in every other survey, i.e. once per year. We will be looking to draw on the successful supplier's expertise and experience for advice on which issues public opinion is likely to be more or less stable over time.

The topical questions would be agreed prior to each survey, to allow us to take the temperature on public opinion on specific issues that are relevant at the time. In the past, for example, we have surveyed public attitudes towards capping social care costs, working with the EU to respond to COVID-19, the £20 per week uplift in Universal Credit during the pandemic, and the use of a contact tracing app to track COVID-19 cases. We may also use this component to understand public perceptions related to underlying trends and emerging long-term issues – linked to the ongoing work of our **Shaping Health Futures** programme – for example attitudes towards a 'net zero' NHS or emerging health care technologies.

4.2 Block 2: Optional additional polling and research services

In addition to the core polling activities described, we want the option to flexibly request and commission additional polling and research services as part of this contract. These additional services might include, for example:

- an additional round of polling to update particular results from the core polling or to ask new questions ahead of, or in response to, a major event
- a piece of more in-depth research with the public, such as survey research or deliberative engagement to explore public views on a topic in greater detail than the core polling would allow for.

We anticipate that we might request additional research services in response to a sudden major event in the external environment, such as a general election, or in the run up to an important fiscal event. We may also want to further explore a particular topic in response to notable findings from the core polling activities (in block 1) or other emergent policy priorities. We would work closely with the successful supplier to identify topics where this additional research would add value. The supplier would be expected to support us with scoping and research question development and to advise on appropriate research design.

Suppliers responding to this Invitation to Tender should include a short, high-level proposal for how they would propose to undertake a deliberative research project based on an example topic (see Box 1). While the topic detailed below is hypothetical, it represents a typical example of the research we may seek to commission via this contract. This is intended to enable suppliers to demonstrate, on a broadly equivalent basis, their approach to the design and delivery of such research. While prospective suppliers are not expected to submit a fully developed and detailed proposal for this hypothetical research, responses should briefly explain how they would look to approach the design and delivery of the work, including a short outline of the methods used and costs.

Box 1: Example topic for deliberative research

The focus for the research would be to understand public attitudes towards the emerging backlogs in acute, community, mental health and primary care services caused by the COVID-19 pandemic. The aim would be to understand perceptions of the problem, key priorities and principles for addressing the backlog, and views on the different policy options and trade-offs that will be involved in doing so. The project would involve up to 100 members of the public via deliberative workshops with involvement from relevant subject matter experts from the Health Foundation, supplemented by surveys or in-depth interviews if considered appropriate. This project would have a budget of £65,000 inclusive of VAT and expenses.

The successful supplier will demonstrate their ability to respond to additional ad-hoc research requests. They will have expertise and a strong track record of delivery in a range of quantitative and qualitative approaches for generating insight into public views, such as surveys, qualitative research and deliberative workshops. Suppliers should provide relevant examples of their experience in using these approaches as part of their response.

The successful supplier will also be able to demonstrate that they have the capacity and flexibility to mobilise resources quickly to respond to these additional requests. Suppliers should describe in their response how they intend to work with us from the point of idea generation through to the delivery of ad-hoc requests for additional research.

5.0 Project management

This project is being led by the Health Foundation's Policy team. The successful supplier team will be expected to take a highly collaborative approach to this work, working closely with the Foundation's Policy team to deliver this programme over two years. The supplier will also be expected to collaborate with the Foundation's Communications team, as required, to support the publication of findings throughout the contract period.

The successful supplier will demonstrate a strong track record of delivery with clear project management approaches. They will ensure the delivery of all polling and research activities to agreed timelines. They will also develop processes for working with us to draw out the implications of the findings and for capturing cumulative insights and learning generated from across the whole programme of work.

The Foundation will also establish an internal advisory group to guide topic selection and question development, support with the interpretation of findings, and ensure that this programme is aligned to wider work taking place across the Foundation. The Foundation will be responsible for coordinating the advisory group's input into this work. The supplier will be required to present their findings to the advisory group after each round of polling and to incorporate the implications of any feedback into further rounds of polling or research.

6.0 Deliverables and outputs

Deliverables for core polling activities (block 1)

The key deliverables for this work are the production of data tables and a polling report or PowerPoint slide deck for each of the four biannual polls, suitable for internal Health Foundation audiences. After the first poll, subsequent polling reports should track and highlight any changes in public perceptions over time, where applicable. The supplier will also be required to present polling findings to our internal advisory group.

We envisage that we will publish the polling findings through a range of outputs and the successful supplier must work closely and flexibly with us to tailor their reporting to our needs. For example, we expect to publish selected time-sensitive results in a fast and flexible way, such as through media releases and comment pieces. The supplier will need to be available to review draft outputs to ensure findings are fairly and accurately portrayed.

We would also like to produce more in-depth analysis where we present the findings of multiple rounds of polling results through published Health Foundation reports (we anticipate producing one major output per year). Our aim here would be to present the policy and political context for the results and to produce a richer discussion of the implications of the findings for policy. Suppliers should set out in their proposals how they will work with us to develop insights across the multiple rounds of polling to inform these more substantive outputs. Suppliers should also set out whether they are able to provide co-author(s) for Health Foundation reports (one per year).

Deliverables for additional research services (block 2)

Should we request additional research services (quantitative or qualitative), the deliverables for this work will be defined and agreed with the successful supplier on a case by case basis at the point of project scoping. The supplier will be expected to produce an analysis and final report of findings of any additional research requested. The supplier would also be expected to present these findings to our internal advisory group.

7.0 Timeline

Below is an indicative timeline for delivery of the core polling activities (block 1). The work will commence in early October 2021 with the question development for the first round of polling. The first poll will need to be delivered (fieldwork and internal-facing reporting) before the end of 2021.

Activity	Date
Contract awarded	Oct-21
Poll 1 question development and fieldwork	Oct/Nov-21
Poll 1 findings and reporting	Dec 21
Poll 2 question development and fieldwork	May/Jun-22
Poll 2 findings and reporting	Jul-22
Potential major Health Foundation output (based on polls 1&2)	Oct-22
Poll 3 question development and fieldwork	Oct/Nov-22
Poll 3 findings and reporting	Dec-23
Poll 4 question development and fieldwork	May/Jun-23
Poll 4 findings and reporting	Jul-23
Potential major Health Foundation output (based on polls 3&4)	Oct-23

Additional research services (block 2) may be requested at any point during the contract period. The delivery timeline for additional requested work would be subject to negotiation with the successful supplier, however we would expect this work to commence as soon as is practicably possible.

8.0 Budget

- the budget for block 1 activities is up to £260k (inclusive of VAT and expenses)
- the budget for block 2 activities is to be agreed if and when this work is requested, but is not likely to exceed £65k (inclusive of VAT and expenses).

9.0 Selection criteria

Responses will be evaluated by the Foundation using the following criteria in no particular order:

- ability to deliver on all required services or outputs. This includes both the core polling services (block 1) and any requests for additional research services (block 2).
- the quality and clarity of the proposal, products or services
- evidence of proven success of similar projects / evidence of adaptability of any existing products to be used
- responsiveness and flexibility, including ability to respond to any ad-hoc requests for additional research services (block 2)
- transparency and accountability
- value for money
- financial stability and long-term viability of the organisation (Due diligence will be undertaken on all shortlisted organisations)
- ability to collaborate with relevant Health Foundation teams.

It is important to the Foundation that the chosen supplier 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.

10.0 Tender response requirements

Providers are requested to complete a tender response form on the AIMS system in presenting their response (a sample tender response form is attached). Providers will be asked to provide the following as part of their response:

Detailed provider information 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.

Information in response to the tender, such as:

- 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
- any other relevant information the 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.**

11.0 Instructions for tender responses

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.

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.

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.

The 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 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.

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

12.0 Selection process

Please complete the online tender response form on the AIMS system by 12.00 midday Friday 24 September 2021. **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.**

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.

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

The screenshot shows the AIMS system interface. At the top left is the logo for 'The Health Foundation'. Below the logo are four navigation tabs: 'Tasks', 'Contacts', 'Create Application', and 'Reports'. The 'Create Application' tab is selected. Below the tabs is the heading 'Programme'. Under 'Programme', there is a radio button and the text 'Select the programme below that you wish to apply to.'. Below this is a note: 'If the programme that you would like to apply for it not listed, you may not have registered cor'. At the bottom of the form, there are two buttons: 'Award' and 'Contract'. The 'Contract' button is highlighted.

On the next screen, click into the drop down menu and select the 'Policy polling programme 2021-23' in the drop down for 'Programme call', as shown below.



The screenshot shows the top navigation bar of The Health Foundation website with the logo and menu items: 'Tasks - Test', 'Contacts', 'Create Application', and 'Reports'. Below this is a section titled 'Programme Call'. Inside this section, there is a form field labeled 'Programme Call: *' with a red asterisk indicating it is required. To the right of this field is a dropdown menu with the text '*Select the relevant call*' and a downward arrow. Below the dropdown menu is an 'OK' button. At the bottom left of the form area, there is a red asterisk followed by the text '* required'.

A response to your application will be made by **5.00pm Friday 1 October 2021**.

Interviews will be held in the **week commencing Monday 4 October 2021**.

Final decision will be communicated by **5.00pm Monday 11 October 2021**. Start date to be agreed following the final decision (and would be as soon as practicable).

13.0 Confidentiality

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.

Suppliers may be requested to complete a non-disclosure agreement

14.0 Conflicts of interest

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/sites/default/files/2019-02/Health-Foundation-policy-on-conflicts-of-interest.pdf>