Panel Research clarification responses

1. Ref this criterion: Demonstrated a record of running research panels to support policy and practice development in the third sector

**If our experience is not exclusively in the third sector but more so in others will that be considered?**

**We will consider all relevant experience relating to recruiting and running research panels as we are looking for organisations who will be able to set up a panel from scratch for The Fund and can demonstrate a track record in this area. Experience of the third sector is desirable as many of the organisations we fund are from the voluntary and community sector, but we will review all experience.**

1. You suggest that you will run **4 main activities per year** which may be supplemented by ad hoc activities and then later reference ‘**regular surveys** to be developed and administered to the panel’ – presumably the maximum to avoid survey fatigue will be 4?

**Yes we envisage 4 surveys per year. We will discuss with the successful bidder how we could administer additional research on an ad hoc basis, if we wanted to find out more about a specific issue, whether that be specific to heritage type, organisation size or geographic location. Any ad hoc research would be to a limited number of participants, rather than the full panel.**

1. Do you have a sense of how many organisations you would be looking for in the Panel?

**In Section 2.2 we laid out the number of organisations we have regular contact with, and in Annex 1 we provided details of grants awarded over three years (up to the end of the financial year 2020/21) by heritage type, type of organisation, grant size and location. We will break this down further for the successful bidder. We are looking for a sample that is representative of the breath of our funding, where we can draw inference from the responses. We would like bidders to put forward a realistic plan for recruitment, based on the work required to recruit and retain the panel, survey method, follow up work and capacity to deliver ad hoc pieces of research to all or specific sections of the panel during the year. We are looking for realistic plans which take these factors and the budget available into account.**

1. Is it possible to have Annex 1 in an excel format, please?

**Yes. See the excel document posted with this document**

* Schedule D, Item 2:  is not relevant to this research. It is, however, covered by the grid to be completed in the Research Panel ITT

**These are the standard terms in our contract. We will begin contract negotiations with the successful bidder after the procurement phase.**

* The reference in the Research Panel ITT, item 1.5, to a ‘new Panel’ would appear to refer to the fact that a database of 7000 organisations already exists:

**The 7,000 organisations refers to organisations who are previous or current grantholders.**

* Can we assume that the details/content of that Panel will be provided to us upon commissioning?

**Yes**

* In Excel?

**Yes**

* Is this Panel currently representative?

**It is not a ‘panel’ as such but details of organisations we have funded.**Does it provide the named relevant contact, job title, their email address and telephone number?

**Yes**

* Will you require the existing named person to be contacted to confirm their willingness to continue taking part?

**Yes**

* In any new organisation, please tell us the job title we must secure cooperation from

**We are interested in staff who can confidently respond to questions about their organisation and would ask the winning bidder to explain the nature of the participation so organisations can nominate an appropriate staff member to respond. This will vary widely across organisations, but is likely to need to be someone with an understanding of business planning, demand and revenue post-pandemic.**

* The quarterly surveys:
* What duration should we assume for costing purposes

**The initial phase of the contract is for 18 months. Within this period we expect the successful bidder to establish the panel, recruiting and retaining organisations, delivering 4 rounds of survey, and providing The Fund with insights from each survey round.**

* If there are to be any open-ended questions that require coding, then how many will there be?

**We have not yet determined the question set for research, but we are happy to work with the successful supplier on the basis of a pre-determined number of open-ended questions**.

* You refer to ‘tracking questions’:  how many such questions will there be that remain constant?

**For both types of questions we will work with the successful bidder to agree an optimum amount, taking into account completion rates and ability to draw inference from the results**.

* There is the possibility of research, other than the quarterly surveys. It is implied that this will need to come from the total budget, so exactly what should we cost for and how should these fees be identified within what is required as one total fee?  Of course we may wish to provide options to you. Perhaps supplementary research will be discussed later and fees agreed outside this budget?

**The budget outlined in the ITT is the total budget. We are interested in seeing what bidders think is feasible within the budget. Our intention is to have 4 surveys a year, and explore what scope there is for any additional ad hoc research, if we identified areas we wanted to explore further. We’d be happy to review options and to hear from suppliers what they think is possible within the allocated resource.**