



FRAMEWORK AGREEMENT FOR THE PROVISION OF GOODS AND/OR SERVICES

Agriculture and Horticulture Development Board

and

Brookdale Consulting

**Framework Agreement for the Provision of
Evaluation Support - Lot One
Evaluation Validation – Lot Two**

Ref: 2019-399

FORM OF AGREEMENT

THIS FRAMEWORK AGREEMENT IS MADE ON 20TH NOVEMBER, 2020

BETWEEN

Agriculture and Horticulture Development Board, of Stoneleigh Park, Kenilworth, Warwickshire CV8 2TL ('**AHDB**')
AND

Brookdale Consulting, of [REDACTED] ('**the Supplier**')
AHDB and the Supplier are the Parties to this Framework Agreement.

WHEREAS

- A. AHDB wishes to acquire Brookdale Consulting for the provision of Evaluation Support (Lot One) and Evaluation Validation (Lot Two).
- B. The Supplier is willing to supply the Goods and/or Services in accordance with this Framework Agreement.
- C. AHDB may enter into substantially similar framework agreements for the supply of the Goods and/or Services with other suppliers.

IT IS HEREBY AGREED

- 1. AHDB agrees to appoint the Supplier as a potential provider of the Goods and/or Services described in the Specification (see Annex 2).
 - 1.1. AHDB may, in its absolute discretion and from time to time during the Term, order the Goods and/or Services from the Supplier in accordance with the Ordering Procedures (Annex 3) through a Call-Off Contract based on the template provided in Annex 4.
 - 1.2. Subject to the Supplier's compliance with this Framework Agreement and the making of a Call-Off Contract, AHDB agrees to pay the Supplier in accordance with that Call-Off Contract.
- 2. The Supplier agrees to supply the Goods and/or Services in accordance with the Framework Agreement and the Call-Off Contract.
 - 2.1. The Supplier agrees to inform AHDB promptly if the making of a Call-Off Contract would result in a conflict of interest.
 - 2.2. Any supply of the Goods and/or Services shall be completed in accordance with the relevant Call-Off Contract and in any case not later than two years after the Completion Date.
 - 2.3. In the event of any conflict between these, the terms of this Framework Agreement shall have precedence over those in a Call-Off Contract.
 - 2.4. Unless otherwise specified, the Supplier shall supply the Goods and/or Services to the Principal Office.
- 3. The Supplier acknowledges that:

- 3.1. there is no obligation on AHDB to invite the Supplier to supply any Goods and/or Services under this Framework Agreement;
- 3.2. no form of exclusivity has been conferred on the Supplier in relation to the provision of the Goods and/or Services; and
- 3.3. no undertaking or any form of statement, promise, representation or obligation by AHDB exists or shall be deemed to exist concerning minimum or total quantities or values of Goods and/or Services to be ordered by AHDB pursuant to this Framework Agreement and the Supplier agrees that it has not entered into this Framework Agreement on the basis of any such undertaking, statement, promise, representation or obligation.
4. The Supplier and AHDB agree to comply with AHDB's Terms and Conditions for the Purchase of Goods and Services version 2014 ('AHDB Terms' - see Annex 5), which shall further be incorporated as they may reasonably have been amended by AHDB into any Call-Off Contract.
5. This Framework Agreement consists of:
 - this Form of Agreement,
 - Annex 1 (Contacts, page 6),
 - Annex 2 (Specification Details, page 8) read with the Appendix thereto;
 - Annex 3 (Ordering Procedures, page 36);
 - Annex 4 (Call-Off Contract Template, page 38);
 - Annex 5 (AHDB Terms, page 39)
 each of which together with any documents specified therein is incorporated into and forms part of the Framework Agreement.
 - 5.1. In the case of any conflict or inconsistency, documents shall take precedence in the order in which they appear in Clause 5 above.
 - 5.2. References to Clauses are references to the clauses of this Form of Agreement, to Conditions are references to the terms and conditions of the annexed AHDB Terms and to paragraphs are references to paragraphs in the referring Annex or Appendix unless otherwise indicated.
 - 5.2.1. For the avoidance of doubt, references within a Call-Off Contract shall apply according to that Call-Off Contract.
 - 5.3. This Framework Agreement including the Specification may be amended by the Parties in Writing.
 - 5.3.1. Any amendment including any extension under Clause 7.1 below shall have no effect unless it is in compliance with public procurement law.
 - 5.4. The Framework Agreement and any amendment thereof may be executed in counterpart and by the Parties to it on separate counterparts, each of which when so executed and delivered shall be an original, but all the counterparts shall together constitute one and the same instrument.
6. In this Framework Agreement the following words and expressions shall have the meanings given to them below, unless the context otherwise requires:

<i>Word or Expression</i>	<i>Meaning</i>
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AHDB Terms	AHDB's Terms and Conditions for the Purchase of Goods and Services (attached within Annex 5);
Call-Off Contract	a contract for the supply of Goods and/or Services pursuant to this Framework Agreement
Call-Off Contract Template	The template that shall be used or deemed to have been used for any Call-Off Contract (attached within Annex 4);
Commencement Date	The date set out in Clause 7, as it may have been amended;
Completion Date	The date set out in Clause 7.1, as it may have been amended;
Framework	The framework arrangements established by AHDB for the provision of the Goods and/or Services to AHDB;
Ordering Procedures	The procedures applicable to the making of a Call-Off Contract (see Annex 3);
Specification	The specification provided in Annex 2, as it may have been amended;
Term	The period commencing on the Commencement Date and ending on the Completion Date, the whole day of each Date being included;
Working Day	Any day other than a Saturday, Sunday or public holiday in England.

7. The Framework Agreement shall commence or be deemed to have commenced on 15th January, 2021 ('Commencement Date').
- 7.1. The Framework Agreement shall terminate on 14th January, 2023 ('Completion Date') unless it has previously been extended, in which case the Completion Date shall be deemed to have been appropriately amended. There is the option to extend for 3 periods of 12 months each, should AHDB wish to take up. These will be agreed between AHDB and the supplier and an extension contract will be drawn up. Therefore there is the potential for the contract to be extended until January 2026.
- 7.2. Notwithstanding any act of termination or the achievement of the Completion Date, the relevant provisions of this Framework Agreement shall remain in effect insofar as is necessary to ensure the performance of all obligations and the satisfaction of all liabilities and to enable the exercise of all rights under the Framework Agreement in each case as such shall exist at the time of such act or the Completion Date.
8. Without prejudice to either Party's rights or obligations pursuant to law and subject to Clause 8.4, the aggregate liability of each Party in respect of any claim or series of connected claims arising out of the same cause in any year whether arising from negligence, breach of contract or otherwise shall be limited to the amounts set out in Clauses 8.1 and 8.2.
 - 8.1. In relation to AHDB, the amount shall be one million pounds sterling.
 - 8.2. In relation to the Supplier, the amount shall be one million pounds sterling.
 - 8.3. The amounts above may only be amended in Writing and prior to the event in relation to which a claim is made.
 - 8.4. Where the Supplier is a consortium, each member of the consortium shall be jointly and severally liable for performance of the Supplier's obligations under this Framework Agreement and any Call-Off Contract.

- 8.5. Nothing in this Framework Agreement shall limit either Party's liability for fraud, dishonesty, deceit, fraudulent misrepresentation, death or personal injury.
9. For the avoidance of doubt:
- 9.1. The Supplier's standard terms and conditions for the supply of goods or services do not apply to this Framework Agreement or any Call-Off Contract except as may be specifically agreed in Writing.
- 9.2. In the event that the Framework Agreement applies only to the provision of Goods, the provisions relating only to Services in the Framework Agreement or any Call-Off Contract shall not apply.
- 9.3. In the event that the Framework Agreement applies only to the provision of Services, the provisions relating only to Goods in the Framework Agreement or any Call-Off Contract shall not apply.
10. Amendments to Annex 3
- 10.1. There are no amendments to Annex 3.
11. Amendments to Annex 4
- 11.1. There are no amendments relating to Annex 4.
12. Amendments to Annex 5
- 12.1. There are no amendments relating to Annex 5.
13. Special Conditions
- 13.1. Any conditions specified in this Form of Agreement as Special Conditions shall have precedence over any other provision in this Framework Agreement.
- 13.2. There are no Special Conditions, but clarification over Insurance levels and Liability. For the benefit of the supplier, AHDB refer to 1.14.2 SQ8.1 of the Qualification document the supplier completed as part of the procurement process that confirmed the supplier has, can commit to obtain prior to the commencement of the contract, the following insurance cover:
- Employer's (Compulsory) Liability Insurance = £10million
Public Liability Insurance = £5million
Professional Indemnity Insurance = £3million

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Signed for and on behalf of the Agriculture and Horticulture Development Board

Signature:

Name of signatory:

Date:

5th January 2021

Signed for and on behalf of the Supplier:

Signature:

Name of signatory:

Date:

4 JANUARY , 2021

Annex 1 Contacts

1. Contact information provided by the Parties shall be deemed to be inserted below.
2. Unless otherwise agreed, the Primary Contact nominated by a Party shall represent the Party for the purposes of this Contract.

AHDB

3. AHDB's address for correspondence and service will be:
AHDB, Stoneleigh Park, Kenilworth, Warwickshire CV8 2TL
- 3.1. Communications with AHDB shall be marked for the attention of the person named below as AHDB's Primary Contact.
4. AHDB's Primary Contact will be:

[REDACTED]

or such other person as AHDB may nominate.

- 4.1. AHDB's Primary Contact will accept communications other than notices by electronic mail ([REDACTED]) and (except for notices and matters required to be in Writing) by telephone ([REDACTED])

- 4.2. Communication with AHDB's Primary Contact will be deemed to be communication to all relevant divisions of AHDB.

Supplier

5. The Supplier's address for correspondence and service will be:

[REDACTED]

Communications shall be marked for the attention of the person named below as the Supplier's Primary Contact.

6. The Supplier's Primary Contact will be:

[REDACTED]

or such other person as the Supplier may nominate.

- 6.1. The Supplier's Primary Contact will accept communications other than notices by electronic mail ([REDACTED]) and (except for notices and matters required to be in Writing) by telephone ([REDACTED])

7. The Key Personnel if any in relation to the supply of the Goods and/or Services will be:

[REDACTED]

or such other person as the Supplier may nominate.

Annex 2 Specification Details

1. The Specification relating to this Framework is detailed in this Annex 2 and any amendments thereto are set out or deemed to be included in the Appendix to this Annex, page 48.
- 1.1. The Specification is based on:
 - the invitation and/or acceptance by AHDB for the supply of the Goods and/or Services, by tender, and
 - the Supplier's offer but excluding any of the Supplier's terms and conditions indicated to be imposed thereby except insofar as such terms and conditions do not conflict with any other provision of this Framework Agreement.
- 1.2. Any amendment to the Specification agreed in accordance with this Framework Agreement shall be deemed to be included in the Appendix to this Annex.
2. The information in this Appendix is to be read as having been amended by any amendments set out or deemed to be included in the Appendix to this Annex.

Evaluation Frameworks at AHDB - Specification

Evaluation of AHDB work programmes

The aim of this competition is to commission two frameworks of suppliers in relation to the evaluation work of the Agriculture and Horticulture Development Board (AHDB), against the following lots:

Lot One: Evaluation Support

Lot Two: Evaluation Validation

Suppliers may tender for one or both lots. We are open to proposals from individuals or companies as our contract opportunities will be varied.

Introduction and Background

AHDB is a statutory levy board, funded by farmers, growers and others in the supply chain to help the industry succeed in a rapidly changing world. We want to create a world-class food and farming industry, inspired by and competing with the best. We want to unite the whole industry around a common goal to lift productivity, bringing people together to collaborate, innovate and drive change. The delivery of services to levy payers and industry stakeholders covers six sectors which account for about 75% of total agricultural output in the United Kingdom (UK): Beef & Lamb, Cereals & Oilseeds, Dairy, Horticulture, Pork and Potatoes.

Our farmers, growers and processors expect to see a return on their levy investment, which is why AHDB is determined to demonstrate good value for money through appraising and evaluating our work, measuring performance and impact. It is also essential that we regularly evaluate our business processes to ensure that, as an organisation, we are continually learning and improving what we do.

As part of our Inspiring Success Strategy <https://ahdb.org.uk/corporate-strategies> we aimed to more systematically assess the impact of our work and have put in place bottom-up programme level evaluations of all our levy-payer-facing activities. We are about to move into a new strategy period, however our approach to evaluation still applies.

During the current strategy, we have identified approximately 65 programmes of work over the next five years, covering areas such as research, knowledge exchange, market intelligence and market development. These programmes of work are likely to contain several smaller projects and different work streams with activities that contribute towards the overall programme objectives. The success of each of these work programmes needs to be evaluated. So, AHDB Programme Managers in these areas (with guidance from the AHDB Evaluation Team) are responsible for drafting evaluation plans, and capturing appropriate data throughout the life of the programme. Various pieces of evaluation work will then need to be conducted for each overarching programme of work, examples are listed under lot one below. Some Programme Managers will complete full evaluations themselves and others will utilise suppliers to complete some or all of the evaluation work depending on individual requirements.

We require the evaluations to take place at the end of the programme or activity, and at suitable interim points. Many of these evaluations will include a cost-benefit analysis or assessment of return-on-investment. It is important that the evaluations which are produced are robust and evidence based.

Award of Frameworks by Lot

Lot One - Evaluation Support:

We intend to form a framework made up of more than one supplier; mini competitions will be held for each new piece of work and go out to all suppliers against this framework that have specified they can undertake work of that size (small, medium or large pieces of support, detailed below).

Lot Two – Evaluation Validation:

We intend to award to more than one supplier; commission to the framework will be awarded to potentially a maximum of eight suppliers overall, with a maximum of four suppliers specialising in agricultural economics and four suppliers specialising in evaluation.

Work will then be offered on a rotating basis to two suppliers per validation piece (one supplier of each specialism), dependant on availability of suppliers. Direct selection from the framework may be made for some pieces of validation work, in this instance the rotation will be adjusted accordingly.

Lot One: Evaluation Support

AHDB wish to create a framework to retain suppliers that have the ability to evaluate the impact of our programmes of work. Work will include undertaking formative and summative evaluation of AHDB programmes of work, for instance:

- Producing independent evaluation reports
- Data collection and/or analysis using suitable evaluation methods
- Evaluation surveying
- Cost benefit analysis for creation of return on investment figures or similar
- Developing lessons learnt and recommendations for improvement
- Working with programme leads, other AHDB staff and external stakeholders (collecting data, feedback etc.)
- Developing evaluation plans
- Dissemination of evaluation findings to various audiences
- Interim evaluation techniques such as process mapping

Requirements for evaluation support will be different dependant on the programme of work and flexibility is required. Evaluation support work may need to be completed independently or in collaboration with AHDB Programme Managers. Some programmes will already have some evaluation evidence collected such as survey results, event feedback forms, industry data etc., and will require this evidence to be analysed and reports created; whereas some programmes will need evaluation support to collate evidence from scratch. Programmes will typically already have evaluation plans in place, and will have been through our Investment Test process so will have a business case document which includes objectives, anticipated return on investment etc. Typically work will involve evaluating the success of the programme described in the business case, and if the programme of work met its objectives and desired level of impact. The programmes of work are of different sizes and budgets, so the evaluation support work required will be varied and successful suppliers will need to be flexible. Two previous example specifications are included as examples at Appendix One and Two.

Evaluation work is new to some areas of AHDB and as such, it is difficult to predict exact requirements for evaluation support, so a flexible approach will be required. Once the successful suppliers for Lot One Evaluation Support, are in place, we estimate that suppliers will be given the opportunity to bid for the following, although this will depend on individual work programme requirements:

Estimated number of contracts	Estimated size of report	Estimated budget range	Further information
x 10 per year	Small evaluation support	£5-£25k	Such as in Appendix One
x 3 per year	Medium evaluation support	£25-£40k	Such as Appendix Two

x 1 per year	Large evaluation support	£40K+	This may contain a significant amount of data collection, such as a sizeable survey or advanced statistical analysis of industry datasets (ex: genetics or research programme work)
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Suppliers accepted onto the Evaluation Support framework will already have provided details of their knowledge and experience via the Bravo Qualification envelope, therefore this will not be a requirement at the mini competition stage.

Budget

Deliverables and budget will vary and be dependent on the individual mini competition contract opportunity, as described above.

Proposal Requirements: Within your proposal, please clearly demonstrate the following:

1. Ability to deliver a variety of evaluation support.
2. The proposal should clearly demonstrate the supplier's suitability for meeting requirements of AHDB against the evaluation support lot.
3. Suppliers should be able to demonstrate a track record of providing evaluation services.
The UK Evaluation Society's [Framework of Evaluation Capabilities](#) summarises desired competences around evaluation knowledge, professional practice and qualities and dispositions.
4. Suppliers should be able to demonstrate experience of working in the agricultural sector.
5. The proposal should include the following details:
 - name and full contact details of the project manager who would be leading any projects
 - relevant experience of project manager
 - role and name of key members of proposed staff to be involved in any projects
 - CVs for key members of staff to be involved with any projects
 - demonstrating how you will ensure continuation of service at the required level if any key members of staff leave your company
 - demonstrating, with reference to specific examples, a recent successful track record with similar contracts
 - a breakdown of hourly/day rates for each staff member

6. Details and experience of any third party agencies that will be used to deliver any projects. Clearly indicating the stage in which they would be involved and the expected extent of their involvement.
7. Example methodologies used to achieve the evaluation support must clearly be identified in the proposal.
8. A process for quality control and adherence to MRS code of conduct where relevant. Higher marks will be awarded where this information is presented in a way that demonstrates how quality control processes impact on/are implemented at each stage of relevant projects.
9. Examples of how a project would be planned and typical timescales for work.

Structure of Submissions and Evaluation Methodology

Evaluation of proposals will be undertaken in accordance with the following criteria and weightings:

80% of the evaluation weighting will be based on the quality of the proposal.

- Outline a clear approach to different aspects of evaluation support – clearly demonstrating how the supplier could achieve evaluation objectives for relevant contracts, to deliver clear and robust evaluation support for AHDB. (30%)
- Experience of project manager and supporting team in delivering similar projects in terms of methodology, location, sector etc. (20%)
- Demonstrate a clear strategy for maximising evaluation effectiveness, giving at least two examples of where contracted evaluation work has improved programme performance. (10%)
- Present an objective and well-structured proposal which clearly lays out the required information and includes a detailed breakdown of costs and example project plans, identification of any risks to delivery. (10%)
- Demonstrate how a process for quality control will be followed at each stage of the process. Along with adherence to the MRS code of conduct where necessary. (10%)

20% of the evaluation weighting will be based on the cost of the proposal.

- To enable comparability of cost of proposals, we require submissions to include example bids for the proposals in Appendix One and/or Appendix Two. (20%)

If suppliers are interested in providing services for varying sizes of work, example bids for both Appendix One and Two need to be submitted.

For example, Appendix One gives an example specification of a smaller piece of evaluation work, and Appendix Two gives an example specification of a medium sized piece of evaluation work. If selected to be on the framework, suppliers that choose to give an example bid for Appendix One only, will only be sent specifications for smaller evaluation mini competitions; suppliers that choose to give an example bid for Appendix Two only, will only be sent specifications for medium or large evaluation mini competitions; whereas those that choose to give an example for both Appendix One and Two will be sent specifications for all evaluation mini competitions.

Suppliers must clearly mark their final lump cost for any example bids against Appendix One and/or Two. In addition, a breakdown of costs for all stages of each project excluding VAT, and a breakdown of the number of days and day rates for each stage of the project including both fieldwork and non-fieldwork stages of the project, should be included to allow for comparison between suppliers.

The proposal must illustrate how each of the service requirements could be met and describe how the service requirements could be delivered to AHDB.

Lot Two: Evaluation Validation

AHDB wish to create a framework to retain suppliers that can validate evaluation reports and return on investment calculations produced internally at AHDB. Work will include reading and analysing internally produced AHDB evaluation reports and/or return on investment calculations or similar, to provide scrutiny and suggestions for improvement, and advise on reliability of the reports. In effect validating the evaluation work we produce in house.

We require two validators to validate each report, one with an evaluation specialism and one with an agricultural economics specialism. Work will be offered on a rotating basis, dependant on availability of suppliers. Where any supplier is able to offer both evaluation and agricultural economics specialisms, AHDB will decide which aspect the supplier should focus on for each validation piece; one individual may not do both the evaluation and economics validation of the same piece of work. Two individuals from the same company will not be selected to validate the same piece of work.

The validation work will include completing a two page validation form for each report. This may include topics such as:

- General questions on the report or return on investment calculation
- Areas of critique

- How can the report/calculations be improved?
- Is evidence reliable?
- Are any assumptions outlined realistic?
- Do you agree that the report/calculations are reasonable? Why?

We envisage that reports to be validated will be on average 30 pages in length. Supporting documents such as completed cost benefit analysis spreadsheets will also be provided where appropriate.

An initial meeting (via Teams) will be set up with any successful suppliers before any work starts.

Evaluation work is new to some areas of AHDB and as such, it is difficult to predict exact requirements for evaluation validation. It is likely that we will have a busier period for validation work between January and March each year, in line with production of our annual Evaluation Summary Report each April. We estimate that the following may be required:

- 20 to 25 internal evaluation reports and/or cost benefit analysis calculations (or similar) to be validated per year
- Two suppliers validating each report
- Estimated time to validate each report, half a day
- Turnaround time is likely to be around two weeks from receipt of report

Budget

A day rate of £550 is offered, so £275 per half day. (Fixed price for the duration of the contract).

AHDB will identify the anticipated time required to complete a validation piece of work when each piece is distributed to suppliers (e.g. half a day, one day, two days etc.), invoices must not exceed this amount without prior discussion and agreement from AHDB. Work will be shared as equally as possible to all on the framework.

Proposal Requirements

1. Ability to deliver evaluation validation of internally produced AHDB reports and cost benefit analysis calculations (or similar), covering a variety of AHDB work functions, such as research, marketing, market intelligence and knowledge exchange, all relating to the agricultural industry.
2. The proposal should clearly demonstrate the supplier's capability for meeting requirements of AHDB against the evaluation validation lot. Suppliers should be

able to demonstrate a track record of providing validation work in either evaluation in the agricultural industry, or agricultural economics.

3. The proposal should include the following details:
 - a. name and full contact details of validator
 - b. whether the validator is suited to evaluation validation and/or agricultural economics validation
 - c. relevant experience and knowledge of validator
 - d. a brief summary of suitability of the validator to meet the validation requirements
 - e. demonstrating, with reference to specific examples, a recent successful track record with similar contracts
4. Details and experience of any third party agencies that will be used to deliver any projects. Clearly indicating the stage in which they would be involved, and the expected extent of their involvement.
5. A process for quality control and consistency with validation work. Higher marks will be awarded where this information is presented in a way that demonstrates how quality control processes impact on/are implemented through validation work.
6. Availability for evaluation validation work throughout the year, with the bulk of work in the first quarter as described.

Structure of Submissions and Evaluation Methodology

100% of the evaluation weighting will be based on the quality of the proposal.

- Experience and knowledge of validator in delivering similar projects in terms of evaluation or agricultural economics validation; giving relevant examples of research or evaluation projects conducted on areas such as agricultural productivity, R&D, marketing etc., and evidence of publications in related areas. (60%)
- Demonstrate a clear strategy for maximising validation effectiveness, giving examples where possible of where contracted validation work has improved performance. (20%)
- Present an objective and well-structured proposal which clearly lays out the required information, includes identification of any risks/key dates and demonstrates a process for quality control. (20%)

Duration of contracts

Contracts for both frameworks will cover a two year period, with the option to extend for a further three periods of 12 months each if required.

Key personnel and account management

The AHDB's Evaluation Manager will be responsible for management and day-to-day running of both the Lot One Evaluation Support contract and the Lot Two Evaluation Validation contract.

Any queries regarding this specification should be directed through the Bravo portal.

Terms/conditions of participation

AHDB Terms and Conditions for the supply of goods and services shall apply to any contract awarded as a result of this request for quote. A copy of these can be found on the AHDB website by clicking [here](#).

Submission Guidelines

All proposals should be submitted and received by 12:00 Noon 30th October 2020.

Please respond via the Bravo portal

Please detail within the proposal which lots you are tendering for: Lot One, Lot Two, or Both

Submissions will remain unopened until after the closing date and time has passed. Any clarifications are to be sent via the Bravo portal, the cut-off period for clarifications being 23rd October 2020.

AHDB will review and evaluate tenders after the closing date, and may seek clarifications from suppliers as part of the selection process. AHDB reserves the right to seek alteration of individual tenders to meet the exact requirements and to decline all tenders should the requirements not be met.

Timetable

Tender launched – competition published	28.09.2020
Deadline for receipt of responses (12.00 noon)	30.10.2020
Communication of intended awards	24.11.2020
Award of contracts	09.12.2020
Contract commencement	15.01.2021
Lot Two attendance meeting at AHDB main office	04.02.2021

Examples are relevant to Lot One

Appendix One: Example of a smaller piece of evaluation support work - extracts from the Pork KE Programme Evaluation specification

REQUEST FOR QUOTE (RFQ): Pork Knowledge Exchange Programme Evaluation (June 2019 – June 2021)

Background/Aims

In April 2018, following a successful Investment Test business case, AHDB launched a 3 year programme of Knowledge Exchange (KE) work through its Pork KE team. This work includes the coordination of Pork Field Trials, PhD and EUPiG activities in order to generate knowledge and produce industry tools and resources, as well delivery of Farm Excellence activities such as Strategic Farms, Technical Events and Pig Clubs/Groups.

This RFQ is seeking a supplier to carry out an interim formative evaluation of the first year of the programme (set up phase) and then a summative impact evaluation on the success of the programme. The supplier shall work in partnership with the AHDB, Pork KE and MI Evaluation teams to deliver the work.

Required outputs

<i>Supplier:</i>	<p><i>The supplier should be able to demonstrate:</i></p> <ul style="list-style-type: none"> <i>• A track record in evaluation consultancy</i> <i>• Experience of working within the agricultural sector</i> <i>• An understanding of GDPR and its compliance</i>
<i>Interim report</i>	<ul style="list-style-type: none"> <i>• The interim report should review the progress made towards implementing the Investment Test business case and subsequent delivery in year 1 of the project plan.</i> <i>• Recommendations should be made on how to improve programme delivery, increase uptake and engagement with the pig industry and its stakeholders and maximise impact for the remainder of the plan</i>
<i>Resources for interim evaluation:</i>	<p><i>The following are available now:</i></p> <ul style="list-style-type: none"> <i>• AHDB strategy 2017-2020</i> <i>• Pork KE Investment test business case and feedback</i> <i>• 1st year (2018) results from Farm Excellence Impact Survey and cost benefit analysis from year 1</i> <i>• 2018/19 technical events feedback form evaluation</i> <i>• Precision Pig awareness, uptake and benefits/barriers baseline survey</i> <i>• PigPro reports on uptake to date</i> <i>• EUPiG phase 1 report (covering 18mths of delivery)</i>
<i>End of programme evaluation</i>	<ul style="list-style-type: none"> <i>• The summative impact evaluation should review delivery in years 2 and 3 (building on year 1) of the plan, review uptake and engagement with the pig industry / stakeholders and assess value for money, cost benefit and the end results</i> <i>• Recommendations should be made on future KE activity and ways to improve delivery</i>
<i>Resources for end evaluation:</i>	<p><i>The following will become available:</i></p> <ul style="list-style-type: none"> <i>• 2nd and 3rd year (2019 and 2020) results from Farm Excellence Impact Survey and cost benefit analysis</i> <i>• 2019-2021 technical events feedback form evaluation</i>

	<ul style="list-style-type: none"> • <i>Precision Pig awareness, uptake and benefits/barriers repeat survey</i> • <i>PigPro reports on uptake to date</i> • <i>EUPIG end of programme reports</i> <p><i>This isn't an exhaustive list and other evidence, case studies etc will be available</i></p>
<i>Industry and Stakeholders</i>	<ul style="list-style-type: none"> • <i>The successful supplier may wish to contact a small number of producers and stakeholders to gain direct feedback. This methodology should be outlined in the quote</i>
<i>AHDB Staff</i>	<ul style="list-style-type: none"> • <i>Face to face meetings can be undertaken, or attendance at team meetings to ask questions to help inform the evaluation can be made</i>
<i>Report Template</i>	<ul style="list-style-type: none"> • <i>Please provide a suggested template for the evaluation report</i>
<i>Project Plan</i>	<ul style="list-style-type: none"> • <i>Please provide a project plan, covering the production of the interim and end of programme report</i>
<i>Timings</i>	<ul style="list-style-type: none"> • <i>The interim report should be done in Jun-Aug 2019 and made available by end Aug 2019</i> • <i>The full end of programme evaluation should be carried in April/May 2021 and made available by end June 2021.</i> • <i>Invoicing should be after completion of each report</i>

Relevant to Lot One

Appendix Two: Example of a medium sized piece of evaluation support work - extracts from the Farm Excellence Platform Impact Survey specification

Research objectives

AHDB requires an outcomes & impact survey of those levy payers and stakeholders who have directly engaged in its Farm Excellence Platform (FEP). The primary purpose is to deliver an evaluation of the FEP in terms of its actual impact on the ground at a host, attendee and industry level. The secondary purpose is to create an effective organisational baseline measurement to inform forward planning and track performance over time. The survey will determine current levels of perceived benefit and conversion of learning to reasoned action and improvement. A survey based on around twelve key metrics will allow AHDB to evaluate its performance in knowledge exchange as one organisation as well as being able to compare and contrast baseline levels between individual sectors.

The initial outcomes & impact survey (Y1) will then be required to be repeated annually in order to measure the progress across the metrics measured in the baseline survey. The successful bidder will be required to carry out three surveys, one baseline (Y1) plus two follow-up surveys (Y2 to Y3), between August 2018 and March 2021. It is anticipated that the fieldwork for each year will be carried out between November and January.

The findings of the initial (Y1) baseline survey will need to be delivered by March 2019.

Bidders should note that 2018 will be the first time that AHDB will carry out an impact survey for its whole FEP. Previously, surveys have been undertaken and event feedback collated by the individual sectors. Some AHDB sectors conduct surveys annually while others do so on a less frequent basis. Inconsistencies in the methodology and sampling approach and timings of the individual surveys have prohibited meaningful or measurable cross-sector comparisons. However, the individual surveys serve an important purpose at sector level, informing strategic plans. AHDB wishes to explore the opportunities for synergistic collaboration within the scope of the single FEP impact survey from 2018 onwards. Several of the sectors ask very similar questions, examples of which are provided in Appendix 3.

3. Service Requirement

3.1 Research Objectives	<p><i>In 2018, research is required initially to establish a baseline measurement of around twelve predetermined customer metrics to inform future planning and direction. It is anticipated that eight of these will be generic across the sectors with a further four being sector specific. The generic research metrics chosen need to provide a measure of:</i></p> <ul style="list-style-type: none"><i>i. Awareness of FEP</i><ul style="list-style-type: none"><i>o How did they find out about the FEP?</i><i>o When did they find out?</i><i>ii. Involvement with FEP</i><ul style="list-style-type: none"><i>o Why did they choose to get involved in the FEP?</i><i>o What was their aim for attending?</i><i>iii. Uptake of FEP</i><ul style="list-style-type: none"><i>o How many FEP events have they attended?</i><i>o What has been their uptake of any resulting products/services?</i>
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	<p>iv. <i>Learning</i></p> <ul style="list-style-type: none"> ○ <i>What key messages have they taken from attending FEP events?</i> ○ <i>What skills have they improved following attendance at FEP events?</i> <p>v. <i>Change</i></p> <ul style="list-style-type: none"> ○ <i>Have they made any changes following attendance at FEP events?</i> ○ <i>If yes, what and why?</i> ○ <i>If no, do they intend to make any change?</i> ○ <i>Or if no, why not?</i> <p>vi. <i>Benefits (economic, social, environmental)</i></p> <ul style="list-style-type: none"> ○ <i>Perceived benefits of making change</i> ○ <i>Realised benefits of making change (economic quantification where possible and considering timescale of farming year)</i> ○ <i>Will they continue to realise benefits into the future?</i> <p>vii. <i>Satisfaction</i></p> <ul style="list-style-type: none"> ○ <i>Did the FEP events / meetings achieve their objectives?</i> ○ <i>Changes they think could be made to the FEP</i> <p>viii. <i>Recommendation</i></p> <ul style="list-style-type: none"> ○ <i>Would they recommend the FEP (scale 1 – 10)?</i> ○ <i>Net Promoter Score</i> <p><u><i>AHDB will be very much guided by the research supplier in terms of setting the pre-determined baseline metrics.</i></u></p> <p><i>For the 2019 and 2020 surveys, AHDB would like to consider an opportunity to expand the research (in addition to the baseline metrics), to include further themed or sector specific questions.</i></p> <p><i>A final decision on the questions to be included in subsequent surveys for 2019 and 2020 will be decided following the outcome of the 2018 baseline.</i></p>
3.2 Approach Sampling	<p>to</p> <p><i>The research sample should be broadly representative of commercial growers and producers in England, Scotland and Wales (but not NI which only applies to cereals and oilseeds), by size and farm enterprise type.</i></p> <p><i>It is expected that around fifty levy payer respondents for each of the six AHDB sectors will be surveyed (total approx. 300). AHDB will also require the chosen supplier to survey about fifty key stakeholders (agronomists, vets, consultants and researchers) who have engaged in the FEP.</i></p> <p><i>Prospective research providers should advise on the sampling approach with reference to the following considerations:</i></p> <p>i. <i>While the FEP is now a common vehicle for delivering Knowledge Exchange across all sectors, each sector is at a different stage of</i></p>

	<p>development and will have varying levels of activity in the four key components illustrated in Appendix 1.</p> <p>ii. The FEP also consists of a variety of different programmes across the sectors - there are different products, services and campaigns used within each sector, examples of which are included at Appendix 2. (Hence, the requirement for a third of the questions to be sector specific). In creating and undertaking the survey, it is important to consider that these sector events and activities are more likely to be how levy payers recognise what they have participated in than the term FEP.</p> <p>iii. The FEP is increasingly linked to, or represented by, digital resources, tools & media which may be the main or only point of access for some levy payers and stakeholders.</p> <p>iv. A respondent may also have multiple enterprises qualifying for levy payment, but should be chosen on the basis of, and asked questions specifically relating to, the sector activity which they have engaged with the most. (One respondent = one enterprise).</p> <p>v. Sampling should be based on producers and growers that have actually attended FEP meetings & events. In addition, AHDB will ask the chosen supplier to also conduct a number of interviews with key stakeholders engaged with the FEP (to be advised once project is awarded).</p>
3.3 Database	<p>In order to carry out the research, the appointed supplier will be provided with a database of contacts covering England, Scotland and Wales (not NI). The database will be compiled from those who have engaged directly (attended an event or logged into a webinar) with the FEP (split into levy payers and stakeholders) and who have provided the necessary consent to be contacted for the purposes of this survey. Prospective suppliers are expected to demonstrate a thorough understanding of GDPR requirements and how they would comply with the regulations at every stage of the survey process.</p>
3.5 Quality Control	<p>The proposal should demonstrate a process for quality control and adherence to MRS code of conduct.</p> <p>Higher marks will be awarded where this information is presented in a way that demonstrates how quality control processes impact on/are implemented at each stage of the research project.</p>
3.6 Additional Information	<p>AHDB will provide the research supplier with details of the FEP programmes as well as examples of past questionnaires. Appendices one to three provide some initial information.</p>

	<i>The successful bidder, once appointed, will have access to the details of previous FEP surveys including questionnaires and key considerations about timings, contact lists and sampling frames.</i>
3.8 <i>Deliverables</i>	<p><i>Questionnaire for Y1 baseline survey.</i></p> <p><i>Data tables of final results in Excel and a final checked dataset in SPSS. Written report & powerpoint presentation delivered at AHDB offices for each of the Y1, Y2 & Y3 surveys.</i></p> <p><i>For 2019 and 2020, an expanded questionnaire with additional questions and findings delivered in Excel or SPSS as in Y1.</i></p>

AHDB Evaluation Support Lot 1

Appendix 1 Proposal

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1. BACKGROUND AND UNDERSTANDING

The pig market is notoriously volatile, strongly influenced by international demand, global production volumes, feed prices and incidences of disease and their impact on herds and market access.

Helping producers ensure that they are abreast of the latest technical and management best practices helps to safeguard the industry against these pressures. The Knowledge Exchange Programme is a three year programme (2019 to 2021) focused on providing the industry with information to help support, protect and promote UK pork production.

There are four main themes that are delivered across a range of farmer facing, industry dissemination and research-based activities. These are:

- Health Management
- Meat Quality
- Animal Welfare
- Precision Production

Ensuring that the sectors are armed with the latest information and best practise in production will help to improve productivity and secure the future of the industry.

1.1 Evaluation Requirements

In order to ensure that the KE Pork Programme is effective in delivering against its aims, and drives real value to the sector, you want an interim formative and a final summative evaluation. In responding to this opportunity, we have brought together a team of highly experienced economists and evaluators, who have a detailed knowledge of working across many aspects of the agriculture sector. This will help ensure that the evaluation adds real value to the delivery of KE Pork Programme and that the findings help in not only capturing the impact of activities, but the lessons learnt and good practise delivered. This will provide wider benefits to AHDB and the KE programmes that it delivers.

Our strong record in evaluations will ensure that the outputs will stand up to scrutiny, following methodologically robust procedures. This means that the outputs can be confidently shared with wider stakeholders, including any reporting requirements that you may have to the levy payers and statutory bodies (e.g. defra).

2. METHODOLOGY

Our detailed approach is set out below for both formative and summative evaluation. This approach can be refined at inception as we discuss the programme with you in detail.

This approach is designed to ensure that the maximum value is gained from the internal data gathering activity that you complete. Additionally, it ensures that we are fully informed of the aims, objectives, activity and context of the programme delivery. This will mean that as we develop both the formative and summative evaluations, you are kept fully updated of our research, findings, and recommendations. This helps to ensure that the process adds real value to the programme delivery.

2.1 Inception Meeting

A key starting point is a detailed inception meeting with the programme manager, AHDB evaluation team, key members of the delivery team.

The focus of the meeting will be two-fold. Firstly, to draw from you as much detail as possible about the programme aims and objectives, delivery mechanisms and activities, logic chain/investment case, data gathering, and monitoring information collected.

The second focus will be to discuss our approach, fine tune any data gathering suggested, discuss initial list of consultees, review timetable and agree informal and formal reporting timetable.

The conclusion of the inception meeting will be confirmed in a written project inception document (PID). The PID is a useful management tool that enables both parties to review progress against our agreed plan. The PID will also detail a risk register and our mitigation actions to overcome issues that are encountered. The risk register is proactively reviewed over the life of the project and updated as appropriate.

2.2 Review of Background Information

We will review all the relevant background information that has informed the development of the KE Programme, including:

- *AHDB strategy 2017-2020*
- *Pork KE Investment test business case and feedback*
- *1st year (2018) results from Farm Excellence Impact Survey and cost benefit analysis from yr 1*
- *2018/19 technical events feedback form evaluation*
- *Precision Pig awareness, uptake and benefits/barriers baseline survey*
- *PigPro reports on uptake to date*
- *EUPIG phase 1 report (covering 18mths of delivery)*

We will also review the contextual background to the development of the KE Pork Programme, including information about the structure and scale of the pig industry, international competition/competition, market prices over time, major industry developments and issues and the trade and consumer market. This will help to ensure that the outcomes associated with the KE Pork Programme are grounded in the operating reality of the pig industry. The wealth of information developed by AHDB will be invaluable here, as well as discussions as required with the Pig Industry Market experts.

2.3 Developing the Evaluation Framework: Formative Evaluation Phase

The Pork KE Investment Test Business Case and Programme Plan are likely to contain the main **components of the logic chain. This is set out to show the Programme's:**

- Intended impact (e.g. addressing productivity gaps, improving herd health, improving product quality)
- Intended outcomes (e.g. improvements in business performance metrics, improving cost basis of businesses)
- Intended outputs (e.g. xx number of farms engaged in lean techniques, xx number engaged in EUPIG, ProPig, Guilt selection)
- Activities delivered to support the intended outputs (demonstration farms, discussion groups, newsletter reach, on-line knowledge sharing etc).

As part of the formative evaluation stage, it may be appropriate for us to formalise the logic chain if one does not exist. This then provides a large part of the structure for the subsequent development of the evaluation framework. Once developed, we will discuss this fully with the programme manager and AHDB evaluation team to ensure that we have captured all the elements of the programme and effectively captured the direction of causality intended by the programme.

- We will work with you in setting out the evaluation objectives statement, key questions **and scope. This sets out exactly what we're seeking to assess within the** evaluation, the scope of our focus and the main questions that you want answering.
- Detail of approach in assessing impact – this will set out how we will answer the evaluation questions, the methodology for calculating impact, cost benefit analysis, added value, attribution and additionality and the data and information needs required.
- Review of baseline and monitoring data. We will review the baseline data collected, and the monitoring data gathered (or intended) and advise on any gaps in information and ways of strengthening the data gathering to help answer your evaluation questions.

We expect that the technically focused programmes such as the Pork KE Programme will be focused on assessing the impact and cost benefit analysis of activities through the evaluation. Our experience of working with the major research councils across the UK in drawing out the economic value of activity will be particularly valuable here.

We recognise that the most technically robust evaluation approach tends to be focused on a **counterfactual approach that draws on a comparator or 'control group'.** However, despite this increasing emphasis on counterfactual impact evaluation, it is notoriously difficult to establish effective control groups for reasons such as:

- Ensuring that it is homogenous to the population for which the intervention is targeted. There may be ethical concerns with this approach (e.g. withholding an intervention from one group).

- Beneficiaries self-select into the programme of activity – meaning there is a danger that those that take part are likely to be ones that expect to benefit from the intervention and will choose to participate - thus already being different from the ones that did not do so.
- The nature of the support landscape – businesses may be accessing other (similar) forms of (financial and non-financial) support - it is difficult to find a 'clean' control group

In our view the counterfactual approach is impractical in the context of the pig industry. Additionally, if there is no control group already set up, which we take to be the case, it could not be easily set up at this point in the programme which again limits use of the counterfactual approach.

Our broad approach is therefore a **theory-based approach, building on the KE programme's** logic chain and the specific questions identified in the requirement. Theory of change explores the causal links implicit in the project logic model, how the project activities are expected to lead to outcomes and impacts, the assumptions inherent in the logic model, the external factors which may affect the success of the programme and the competing explanations that might have led to some outcomes happening anyway, without the programme.

The evaluation framework will guide the summative evaluation. This process forms the core of the formative evaluation, testing whether the defined programme is likely to contribute to the intended impacts and that the causal logic is strong and defined. We will highlight any issues/or a lack of clarity about the causal relationship between activity, output metrics and intended outcomes and discuss options for change as required.

The benefits of a knowledge transfer programme, such as Pork KE, are that many of the intended impacts are designed to have a direct impact on the farm performance, with clear linkages to elements such as productivity improvements, better animal health outcomes, better finishing rates etc. With the right monitoring data in place, measuring the impact of the programme is easier than activities that are aimed at delivering, say for example, behaviour change.

We will review activity and progress made in the first year of the programme - reviewing resource allocation, activity programmed and works completed. This will help identify whether the 3-year programme is on target to meet its objectives and whether any changes are needed. This will take account of the contextual or unforeseen issues that you may have faced in delivery and how the original programme has adapted to respond to changing circumstances.

The formative evaluation will set out progress to date. We have found that our clients favour a traffic-light summary of the concluding findings with areas where there is evidence of high confidence that strong progress is being made highlighted in green, amber represented with some confidence that good progress is being made and red areas highlighting areas where we have low confidence in good progress being achieved. This process helps set out an easily understood summary of the programme activity to date, and identify areas that need further focus, without distracting from the successes to date. This helps ensure that both positive

elements and those that need further focus are given equal attention. It is designed to ensure that the formative evaluation is a useful tool for AHDB to deliver a success programme. This may be accompanied by a set of recommendations.

2.4 Summative Evaluation

The summative evaluation is focused on capturing the impact of the programme and the extent to which it has successfully met its original aims and objectives. As part of this process, and dependent and flexible to specific evaluation questions that you seek to answer, we would look to understand whether there were any additional or unforeseen impact of the programme, in addition to those defined by activity.

For example, Gilt Selection will have very clear intended outcomes in terms of improving the breeding quality of the pig herd. However, we may find that an additional benefit that through the process of improved performance management, farmers have instigated additional changes elsewhere in their pig production units. Capturing these impacts will be helpful in drawing out the fuller effects of the Pork KE on the industry and its participants.

In addition to the desk research reviewing monitoring and activity based data collated as part of activity, focused field research with participants, project delivery (AHDB staff) and other partners/institutions (e.g. PhD students activity) will be valuable in drawing out wider impact of the programme as well as verifying elements of the monitoring data.

2.5 Beneficiary On-Line Survey

We will run an online survey with programme beneficiaries across the main strands of activity (e.g. precision farming, pro pig, EUPIG). This will be designed to capture the impact of the programme on farm activity, assess the additionality of impact, and any wider effects (e.g. impacts elsewhere in the farm business). We will also look to draw out, as necessary, views and opinions about the effectiveness and timeliness of delivery. In ensuring that we are GDPR compliant in our on-line data gathering, we will develop an online questionnaire with covering email for AHDB to send to participants to complete via weblink. We will not seek individual farm businesses details, only metrics about the scale and nature of business.

We also propose that we undertake a number of direct interviews and/or online workshops for those who wish to participate. We would draw the sample by invitation from beneficiaries.

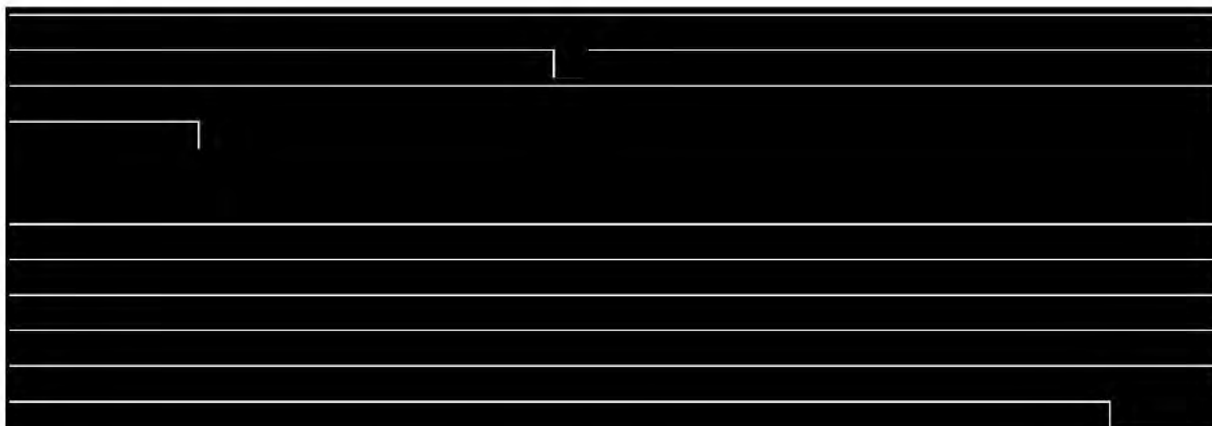
2.6 Semi-Structured Interviews

We will conduct semi structured interviews by telephone/video call with the delivery team and other stakeholders to understand what has worked well, issues and barriers encountered, and unexpected or additional outcomes achieved. This will help to draw out the lessons about the effectiveness of delivery mechanisms.

In compliance with GDPR requirements, we will ask that AHDB contact the delivery team directly, seeking their permission to pass on contact details for the purpose of this research.

When this is gained, we will then send each participant a guide on the information that we will collect, explaining how and for how long the data will be stored. It may also be useful to hold a small online workshop with the delivery team – we often feel it beneficial in terms of a group discussion.

2.7 Measuring impact



2.8 Assessing delivery effectiveness and satisfaction

Using the results of your programme monitoring, feedback data, beneficiary survey, delivery questionnaires and activity reports we will assess the effectiveness of delivery in meetings it targets and objectives.

2.9 Reporting

Our findings will be detailed in a final report, which will include a summary of our main findings. This may also include a set of clear recommendations. Whilst evaluation reports are detailed with all key evidence sources and analysis, our summary data is designed to give a quick overview of key points. Using graphics, we work to ensure that this can be shared widely as required by our clients.

Our reports will be sent to you in draft, providing an opportunity for feedback and review.

2.10 Project Management

A project inception document will be provided post inception, together with a risk register. This will be monitored throughout the study and updated where required. During live periods of the project, we will keep you updated with weekly emails outlining progress against tasks. These can be supplemented with telephone/video discussions as required.

We will send draft outputs for you to review and discuss, including semi-structured interview outlines, questionnaire design, sampling frame and cover notes. We will share the results of the primary research with you in advance of reporting.

AHDB Evaluation Support Lot 1

Appendix 2 Proposal

Evaluation of Farm Excellence Platform

7. INTRODUCTION

Farm Excellence Platform (FEP) is a wide-reaching platform highlighting the best from inspirational UK farmers across the 6 core sectors of AHDB (beef and sheep, pigs, dairy, cereals and oilseeds, horticulture and potatoes). The platform is designed to help the industry learn and share ideas from engaging with market leaders to drive industry innovation and increase productivity and the sustainability of the sector. There are four main mechanisms for delivering information to the industry:

- Strategic farms and centres

- Monitor farms
- Discussion groups and
- Technical events

Whilst much of the dissemination is driven through attendance at events and engagement in discussion groups, additional support is provided through supporting webinars and podcasts, increasing the scope for participation across the industry.

The FEP is independently facilitated by experts, with technical support provided by AHDB and other partners – responding to specific industry or subject issues that arise.

Whilst all 6 sectors are covered by FEP, the extent to which they have established varies, with some at a more infant stage and others much longer running. However, in order to assess the overall effectiveness of this tool in driving innovation and productivity, you require an omnibus survey to set out the baseline and measure the impact of the programme over three years.

7.1 Study Requirements

You want a beneficiary survey to capture the impact of the FEP. Setting out the initial baseline in 2018, and two subsequent follow up surveys between August 2018 and March 2021.

The survey needs to capture the impact of the platform on hosts, attendees and industry against its original objectives. Secondly, the survey needs to help inform AHDB of the future development of FEP or similar industry knowledge dissemination platforms. Having this knowledge will allow you to measure the return on investment of FEP, to compare it with other interventions and to demonstrate to your stakeholders the value for money of AHDB activity.

In delivering this evaluation for you, we have brought together a team of highly experienced evaluators, economists and survey specialists to ensure that the investment in primary research is effective in answering your core questions and helping to assess the impact and value of FEP. Our recent experience in evaluating knowledge exchange programmes such as Menter Moch Cymru, Cornwall Agritech and NIAB plus our experience of survey techniques and participation rates means we are well placed to deliver a successful evaluation for you.

8. METHODOLOGY

Our detailed approach is set out below. This approach can be refined at inception as we discuss the programme with you in detail.

8.1 Inception Meeting

We will start the project by holding a detailed inception meeting with you. The focus of the inception meeting will be to draw out the detail of the FEP and the farmer facing activity driven by FEP. This will help fine tune our thinking about survey design, that due focus is given to

the primary work of FEP (i.e. those areas of most importance, or in receipt of the greatest budget). We will also gain an understanding of the metrics captured by AHDB delivery staff (e.g. post event satisfaction surveys), engagement with different elements, frequency of events etc. This will help ensure that the primary research does not duplicate data already captured internally. A detailed understanding of programme activity will help ensure that appropriate metrics are included in the survey design. For example, if much of activity is aimed at increasing the sector productivity, then metrics and proxy measures to capture productivity improvements will be helpful in capturing impact.

8.2 Stakeholder Consultations

We will conduct semi-structured telephone interviews with around 50 stakeholders identified by AHDB. These consultations will be focused on assessing stakeholders' views of the effectiveness of the FEP programme, and any sector specific issues. Key topics to be reviewed include:

- FEP objectives and fit with industry needs (driving productivity, sustainability and resilience)
- Effectiveness of promotion, marketing and farmer recruitment
- FEP delivery, sector and geographical coverage and value of mechanisms for disseminating information to the sector
- Effectiveness of FEP facilitators
- FEP focus and topics covered – whether they address the issues considered most important
- Actual and potential impacts emerging along with potential case study examples
- Additionality, strategic added value and cross over benefits

We will share a draft semi-structured interview outline with you for refinement prior to the interviews.

The consultations will draw out examples of what is working well, provide an indication of the potential impacts, and the timeframe for impacts to have a material impact on the industry as well as mechanisms for widening participation (e.g. effectiveness of on-line platform, webinars, podcasts).

We also propose developing a specific questionnaire for host farms and monitoring farms. These can either be completed by telephone or via online survey, depending on the complexity of issues and the scope of questions required.

The findings will help inform the process evaluation as well as helping develop metrics for capturing impact in the beneficiary survey.

8.3 Beneficiary Survey Design and Metrics

We propose an online survey as the most cost effective research tool. Beneficiaries can be provided with a weblink to take them to the survey. We suggest inviting participation to the survey via newsletters/online resources. Telephone follow up can be used to encourage participation.

You have eight core areas that you want to cover in the survey, and a further four aimed at sector specific activity. In designing the survey, it is important that a clear and measurable baseline is established and that from this, progress can be measured.

Area	Focus	Potential Metric and recommendation
Background	Profile of respondents	Ensure that it is representative of the sample Enable cross tabulations by beneficiary characteristics (e.g. age of farmer, farm tenure, size of farm, specialisation, diversification, duration engaged with FEP). These will depend on the nature and the focus of the FEP and the target audience.
Awareness	How effective has the marketing of FEP been Different channels	Re coded question listing potential routes. Designed to test whether certain channels are more effective in reaching farmers.
Involvement	Motivation for participation Aims	Fit of expectations with outcomes. Pre coded to include key focus of activity Baseline to capture extent to which participants feel well informed across key areas of intervention
Uptake	Intensity of involvement Investment in follow on products/services	Assessing whether FEP has a cumulative impact and enables cross tabulation of benefits (impact) against events/activities undertaken. Review additionality effects (e.g. leading to other changes/investments)
Learning	What did they gain from attending Skills development New practises/procedures	Skills development Practice and procedural development Proxy for longer term productivity/sustainability development Baseline: assess confidence and skills relating to key areas

Change	Implications of attending Indirect impacts (additional effects)	Changes instigated (proxy for longer term benefits that take longer to be realised) Other wider impacts and potential costs Baseline: immediate changes instigated
Benefits	Quantification of direct benefits (economic, environmental) Timeframe and scale One-off impacts Cumulative impacts	Important to capture net additional impact of the programme. Filtered by theme (productivity, financial, performance, sustainability) Capture occurred benefits and expected benefits. Capture timescale and duration of benefits. Capture any costs Capture additionality (extent to which benefit is attributable to the FEP or would have happened anyway and at slower) Baseline: immediate benefits and proxy for longer term benefits captured To aid completion, value in developing pre-defined brackets of impact or scale of impacts.
Satisfaction	Level of satisfaction Scope and focus of activity	By intervention type (are some more effective than others) Does FEP meet sector needs and expectations.
Recommendation	Wider industry value from the events	Wider value to the sector Merit of wider engagement

8.4 Questionnaire Drafting and Testing

We will draft an on-line questionnaire that will capture the elements identified above plus any additional elements that you want to review. The questionnaire will be shared with the AHDB team and the FEP facilitators to ensure that it captures the detail and terminology of activity.

Once the questionnaire is finalised, we propose that a soft launch is undertaken, enabling us to assess the flow of the survey, quality of answers, ensure ease of completion and that no anomalies arise. This will help us fine tune the survey as required.

We propose a communications package to promote survey participation including newsletters with weblink, webpage and promotion during relevant events. We suggest a prize draw might

help to encourage participants. In addition, we have allowed for telephone follow up to encourage participation and to ensure we achieve the quotas for the different sub sectors.

Within the survey, we will ask if participants are willing to be contacted to discuss findings. A sample of up to 10 respondents from each sector (60 total) will be selected at random to support validation, which will help the future delivery of the survey in years 2 and 3.

8.5 Questionnaire Results and Cross-Tabulations

The amalgamated results of the questionnaire will be provided to you, including cross tabulations as required. The outputs can be provided in Excel or SPSS with a power point presentation of the graphs.

8.5.1 Analysis and Reporting on Year 1 Results

The baseline results of the questionnaire will be presented to show the pre-FEP involvement and post year 1 of FEP. This will show the initial impact of activity and provide the basis to measure subsequent and longer-term impacts.

8.5.2 Year 2 and Year 3 Survey

Before we start on year 2 and year 3 surveys, we will refresh the objectives in discussion with you. This will review the outcome of the baseline assessment and the requirements from the subsequent survey. Any changes can be made at this point.

The survey will be repeated at two separate intervals between August 2019 and March 2021. The survey questionnaire will be reviewed and updated to account for programme changes and any change in focus over this time frame. Key sector specific questions may also need to be added.

The survey will need to capture the impact of intensity of engagement on benefits, and questions will be designed to capture the level of farmer engagement and the value associated with individual activities and the overall cumulative impact of engagement. Cross tabulation by intensity will help to determine whether FEP has a greater impact if farmers attend multiple elements or a few more distant ones. This will help inform AHDB of the effectiveness of different streams of activity.

8.6 Stakeholder Consultations

Further interviews with stakeholders will be conducted to assess their views of the effectiveness of FEP as a delivery mechanism and their experience of being involved. This will help to contextualise the survey results and the key findings from years 2 and 3. It is proposed that up to 20 stakeholders are interviewed in both year 2 and year 3 via telephone and/or

video conference. It may be appropriate to host online workshops with 4-5 stakeholders to facilitate a group discussion alongside the individual interviews.

8.7 Assessment of Impact



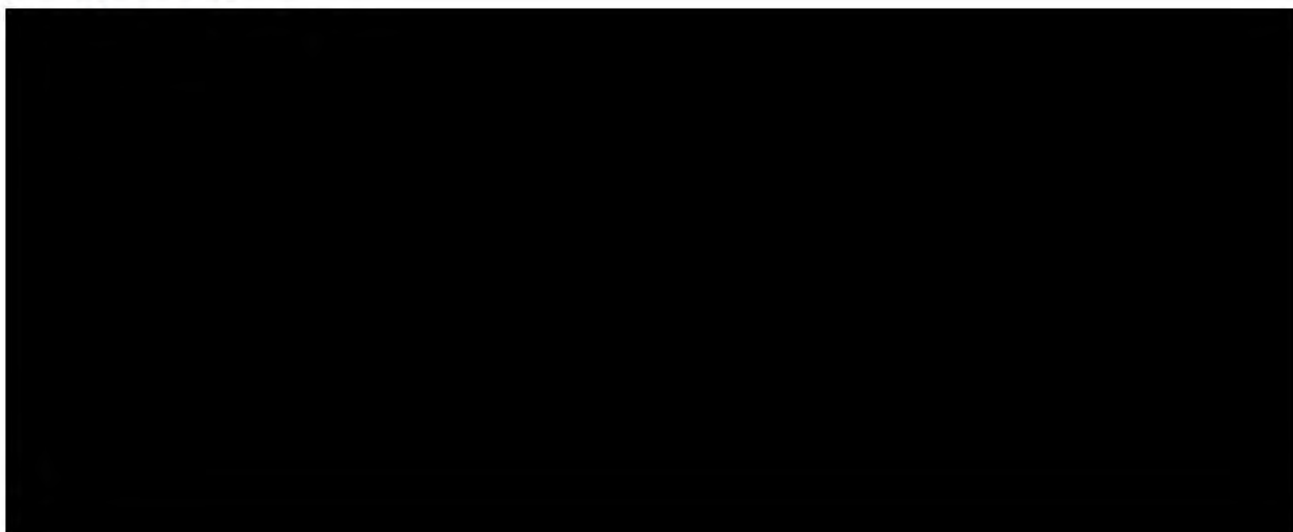
8.8 Reporting

An update report on year 2 and year 3 results will be presented separately. The final report (including year 3 survey results) will look at the overall impact of FEP on beneficiaries. At this point, together with the metrics from participation, it would be possible to estimate the impact of the programme on the population benefitting plus potential to indicate the impact for the industry as a whole.

The data will be provided in excel spreadsheet and accompanying power point presentation and written report.

Our reports will be sent to you in draft, providing an opportunity for feedback and review.

8.9 Project Management





Appendix to Annex 2

Amendments to Specification

The information in Annex 2 is to be read as having been amended by any amendments set out in this Appendix and any other amendments agreed in Writing, which shall be deemed to be included in this Appendix.

Annex 3 Ordering Procedures

1. AHDB may, in its absolute discretion and from time to time during the Term, order the Goods and/or Services from the Supplier in accordance with the following procedures (the 'Ordering Procedures') and a Call-Off Contract based on the template provided in Annex 4 shall be made or deemed to be made.
 - 1.1. AHDB shall provide the Supplier by any appropriate means with a specification of the Goods and/or Services that AHDB requires and subject to any amendment that may be agreed, such specification shall be inserted or deemed to be inserted in any Call-Off Contract that may be agreed.
2. If suppliers other than the Supplier are part of this Framework, AHDB shall decide in its absolute discretion which supplier (which may be the Supplier) is capable and shall be invited to supply the Goods and/or Services.
 - 2.1. AHDB may form a short-list of suppliers to undertake work of a particular type applying the Ordering Procedures.
 - 2.2. AHDB may consider information that has been supplied by the suppliers or publicly available and consequently exclude certain suppliers.
 - 2.3. From the suppliers considered to be capable of supplying the Goods and/or Services, AHDB shall reasonably decide which supplier to invite to supply based upon (a) direct award (see paragraph 3 below) or (b) a mini-competition (see paragraph 4 below) or (c) a hybrid of direct award and mini-competition.
3. If AHDB reasonably believes it has sufficient information to inform its decision, AHDB may select a supplier with which to place an order for provision of the Goods and/or Services without further competition by (a) choosing the one who offered best value for money taking into consideration its speed of available response, quality and price or (b) operating a rota system between capable suppliers who provide similar such value for money (c) by varying the weightings of award criteria as detailed in the invitation to tender/published notice by not more than +/- 10% provided the total weightings is 100%.
4. AHDB may invite the suppliers on the framework (by lot/specialism where appropriate) to take part in a mini-competition in compliance with this Framework Agreement and may select the supplier with which AHDB will place an order applying the criteria indicated in paragraph 3 above and any additional criteria specifically indicated in the invitation to participate in the mini-competition.
5. AHDB may consequently invite the Supplier to provide the Goods and/or Services.
6. The Supplier shall promptly and in any case within three Working Days of its receipt of an invitation to supply the Goods and/or Services inform AHDB in writing whether it accepts that invitation.
 - 6.1. In the event that:
 - (a) the Supplier conditionally accepts the invitation, AHDB shall decide whether it accepts the conditions and inform the Supplier. For the avoidance of doubt, AHDB may discuss the conditions with the Supplier before making such decision.
 - (b) the Supplier accepts the invitation or AHDB accepts the Supplier's conditional acceptance pursuant to (a) above, an appropriate and reasonable Call-Off Contract based on the template in Annex 4 with no amendment of its Annex and no Special Conditions shall be deemed to have been agreed and AHDB shall create a purchase order in favour of the Supplier.

- (c) the Supplier rejects the invitation or AHDB rejects the Supplier's conditional acceptance pursuant to (a) above, the invitation shall lapse and AHDB may offer the order to another supplier.
- 7. In the event that a Call-Off Contract deemed to be agreed pursuant to paragraph 6.1(b) above is not reduced to writing in relation to any order for the supply of Goods and/or Services that is confirmed by a purchase order created by AHDB in favour of the Supplier, the deemed Call-Off Contract shall have effect.
- 8. Any failure by AHDB to comply in full with the Ordering Procedures shall not invalidate the relevant Call-Off Contract or deemed Call-Off Contract and any obligation that would reasonably have been imposed upon AHDB by its compliance in full with the Ordering Procedures shall be deemed to be so imposed. No obligation shall be deemed to be so imposed that is not necessary for compliance in full by AHDB with the Ordering Procedures.
- 8.1. Paragraph 8 shall apply to the Supplier mutatis mutandis.
- 9. Nothing in this Agreement shall require AHDB to place an order for any Goods and/or Services.

Annex 4 Call-Off Contract Template

Call-Off Contracts shall be or shall be deemed to be in the format of the template attached electronically to this Annex 4 and shall incorporate the AHDB Terms included therein as such may have been reasonably amended by AHDB.



Annex 5 AHDB Terms

The AHDB Terms are on page 9 of the 'AHDB Contract for Buying Goods and Services' document embedded in Annex 4 of this document and shall apply to this Framework Agreement.