**Equality, Diversity and Inclusion Research**

## Clarification Questions

**How much data are you expecting us to analyse from the sampling data? How many records will you be supplying?**

We have samples of our grant data split by characteristics of beneficiaries (disability, LGBT, BAME etc) covering a time period for the past five years. We have identified samples of projects that have benefited the groups in scope for the research and will supply these. Given the tight timescales we will aim to make sure you will have to minimal processing of the data. Each data set will be in the hundred's maximum; for example we have identified 580 projects between 2015 and 2020 that benefitted BAME communities.

**What form is the data in?**

The data will be provided in Excel spreadsheets. Given the tight timescales we will aim to make sure you will have to do minimal processing of the data. To see the type of data the Fund collects, see our published open data: <https://www.heritagefund.org.uk/about/insight/open-data>

Alongside this, we also collect contact details for each project and can help the supplier to make contact with those which are sampled.

**Will this data set only include those you term medium engagement groups or will we need to cut the sample data?**

The dataset will allow you to profile organisations based on the number of grants they have received from us in the past six financial years. We will also match this to the samples of grants which have been ‘tagged’ with characteristics of beneficiaries. Suppliers should note, however, that the level of engagement of the organisation with the Fund will be based on all grants they have received, not just those that benefitted groups of people from protected characteristics.

**Are you able to provide all the sampling data by the 7th December?**

We will have the data ready by the 7th December.

**How are the groups and organisations currently recorded and what information will be available to us within the data set? (e.g. location, purpose of organisation or group, size, whether they represent and work with those with protected characteristics?)**

We will split the dataset by whether the project benefits one of the groups with specific characteristics (disability, LGBT, BAME etc) and cover a time period of the past five years. We have identified samples of projects that have benefited the groups in scope for the research and will supply these. Given the tight timescales we will aim to make sure you will have to minimal processing of the data. At a minimum the data will include: organisation name, region, local authority, grant amount, grant programme and heritage area. For an example of our data, please see the Fund’s open data page.

**Does the sample data include how they have engaged with the fund? (e.g. applied for funding but were unsuccessful, received a grant, had contact but not submitted application etc.)**

In the first instance the dataset shows the number and details of the grants each organisation has received in the past 6 years (the period for which we have published open data to 360 Giving).

We are exploring whether we can also match in unsuccessful applications and inquiries too to give a stronger indication of level of engagement.

We are still working through the data and will be able to provide confirmation once the contract begins.

**Will the organisations in this data set be aware they are going to be contacted / have they already opted-in to the research? If not, does The National Lottery Heritage Fund have the capacity to send a mailout for organisations to opt-in to this research?**

The Fund holds contact information for project leads who have agreed to further contact/follow up. As the dataset has not been finalised no organisations have yet been approached about this research. The Fund would contact organisations initially to introduce them to the research and the consultants undertaking the work, via email.

**In your brief you mention you are interested in organisations and groups who have: 1) applied for funding and been unsuccessful 2) have had only one grant 3) have had contact with an engagement manager and not applied, completed or submitted an application on The Fund’s online system. Would you be looking for an equal spread of the outlined groupings above? Or are you happy for a mix of medium engagement groups?**

See comments about data on engagement. However, we acknowledge that given the nature and qualitative focus of this research, providing equal and representative samples may not be possible.

**We also wanted to clarify that medium engagement groups include both unsuccessful and successful applications - but ‘successful’ only so far as having received one grant?**

The dataset has yet to be finalised but at present we are proposing to conduct the research with medium engagement organisations which are those that have received at least one grant in the past six years. We can then add further information about whether they have received other grants as well and we are also exploring whether we can match in data about whether they also applied unsuccessfully.

**Are you open to using some written surveys?**

Yes, we are open to bids suggesting methods they feel are suitable and appropriate.

**How many focus groups are you expecting to take place?**

We do not want to be prescriptive about methods because we would like bids from people with expertise in the area to put forward a programme of work that they feel is suitable to answer the research brief.

**Within the brief, you have outlined five underrepresented groups in the Fund’s portfolio (race and ethnicity, disability, sexual orientation, socio-economic background and age). We also understand that your data shows consistent under-representation of (in order) LGBT+ communities, disability and what we currently name BAME communities. As you outline, intersectionality is key and characteristics cannot be viewed in isolation. However, we did want to check whether you want us to engage with organisations / community groups who explicitly represent and work with individuals from all five underrepresented groups? Or are you happy for us to prioritise the most under-represented as the primary variable for sampling (LGBT+, disability and BAME communities)?**

We acknowledge that due to the timescales involved, the nature of qualitative research, the potential limitations of the data set and complications of working within COVID-19 restrictions, that including all these groups equally may be not possible and we are open to the possibility that prioritisation may be necessary. If prioritisation is necessary, we would expect to work with you on it.

**Are we ok to submit the 10-page proposal as a Powerpoint PDF? Or would you prefer it as a word document? We tend to write proposals in the former, as we can use design and visualisation to increase comprehension.**

Yes, a PowerPoint document is acceptable.