

**UK Research and Innovation – Early Engagement: Evaluation Partner for the Healthy Ageing Challenge**

**Supplier Engagement Day, Astor Court Hotel, 20 Hallam Street, Oxford Circus, London, W1W 6JQ Wednesday 5<sup>th</sup> February 2020 2pm – 4pm**

This document details the format and records the questions raised at the Engagement Day.

This document is distributed to all organisations that attended.

This information will also be available to all parties expressing an interest in the requirement.

**Overview of the day:**

14:00	Welcome and Introductions
14:10	UK Research and Innovation presentation including the ISCF Healthy Ageing Challenge and the evaluation requirement considerations
14:40	Supplier Questions & Answers
15:15	UK SBS Procurement Process
15:35	Supplier Questions & Answers
15:55	Summary, what next and close
16:00	Close

**Introduction to UKRI**

Operating across the whole of the UK and with a combined budget of more than £7 billion, UK Research and Innovation represents the largest reform of the research and innovation funding landscape in the last 50 years.

As an independent non-departmental public body UK Research and Innovation brings together the seven Research Councils (AHRC, BBSRC, EPSRC, ESRC, MRC, NERC, STFC) plus Innovate UK and a new organisation, Research England.

UK Research and Innovation ensures the UK maintains its world-leading position in research and innovation. This is done by creating the best environment for research and innovation to flourish.

For more information, please visit [www.ukri.org](http://www.ukri.org)

**The Business Need**

UKRI is seeking to secure a service provider or a consortium of service providers to carry out the evaluation of its Industrial Strategy Challenge Fund (ISCF) Healthy Ageing Challenge likely over a 4 year period, using a pre-existing shared measurement and learning framework.

## Healthy Ageing Challenge overview

The [Healthy Ageing Challenge](#) is part of UKRI's Industrial Strategy Challenge Fund and was set up to support delivery of the Government's *Ageing Society Grand Challenge*. It encompasses a broad scope which offers opportunities for a wide range of industries and established sectors.

**The aim of this challenge is to enable businesses, including social enterprises, to develop and deliver products, services and business models that will be adopted at scale which support people as they age.** This will allow people to remain active, productive, independent and socially connected across generations for as long as possible.

Through the Healthy Ageing challenge, government funding will bring together UK businesses and researchers to support people to stay in their homes for longer, tackle loneliness, and increase independence and wellbeing.

The objectives of the Challenge are to:

- Focus investments to enable self-sustaining, near to market propositions which have clear potential to move to scale and spread to new markets.
- Stimulate consumer markets in the UK by enabling business-led consortia to develop large-scale markets for healthy ageing services and products.
- Attract private investment to drive onward business growth.
- Make the most of the UK's strengths, particularly in design and manufacturing, to attract inward investment.
- Stimulate economic growth in the UK by enabling UK-based companies to exploit global markets for healthy ageing services and products.

The [Healthy Ageing Challenge Framework](#) developed by the Centre for Ageing Better, has identified seven broad themes which offer the greatest opportunities to tackle market failures and stimulate innovation:



**Figure 1: The Healthy Ageing Challenge Framework**

The challenge will pursue improvements across these seven broad themes by delivering a portfolio of initiatives to impact across this diverse landscape:

- **A trailblazer competition** involving a number of larger 'service integration' collaborations that will take to scale innovative propositions which support people as they age. In particular, addressing gaps in the market for aspirational and affordable services and products.
- **Investment Partnerships** with private finance to catalyse private investment in business- led Research and Development, to grow and take to market innovations for healthy ageing that have clear potential to be adopted at scale.
- A Research Director overseeing a programme of **social, behavioural and design research** that further develops the research base to inform innovators and influence market behaviours, such as informing the design of new community developments.
- **Developing a pipeline of innovations** by providing early stage financial support to academic researchers and SMEs working together to develop new products and services.
- **A community of practice** to maximise the opportunity to achieve a sustained impact by facilitating collaboration across the Challenge.

#### **1. The Requirement (for information – not yet finalised)**

UKRI is seeking to secure the services of service provider or a consortium of service providers to carry out the evaluation of its Industrial Strategy Challenge Fund (ISCF) Healthy Ageing Challenge likely over a 4-year period, using a pre-existing shared measurement and learning framework.

There are three key aims for the service provider under this tender:

1. Provide independent evaluation of the impact of the HA Challenge drawing on evidence from a number of areas.
2. To provide a process evaluation – including how UKRI has set up the programme, the portfolio of funded activities, and the governance model.
3. Provide support to the Trailblazers, and the Social, Behavioural and Design Research Programme (SBD RP) to help them create and provide a 'self-evaluation' plan and indicators showing progress and learnings, along with their own metrics and narrative of success of their funded activities.

**A key objective of the supplier engagement day is to test the 3 aims of the tender and review the anticipated budget for this requirement to ensure a successful outcome. In particular, to understand the options and cost benefits of different approaches to the impact evaluation and approaches for the large-scale Trailblazer projects specifically. Based on the outcome of the supplier engagement, the scope of the evaluation programme may be adapted to include any recommendations from the day.**

***UKRI may consider information and responses received as part of the preliminary market consultation to help inform UKRI's options and further decision making in relation to the planning and conduct of the proposed procurement.***

For the avoidance of doubt, this notice is **not** a Call for Competition; a Contract Notice

will be issued as a call for competition. Not registering an interest shall not prevent any supplier participating in a potential future procurement, nor is it intended that any information supplied as part of preliminary market consultation shall place any supplier at an advantage in a potential procurement process. Participation in preliminary market consultation will be at each supplier's own cost.

# ISCF Healthy Ageing Challenge



UK Research  
and Innovation

Evaluation – Suppliers Day

**Welcome!**



5 February 2020

# Agenda



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Time	Item	Who
14:00	Welcome, facilities, and formalities of engagement	Neil Dixon
14:10	UK Research and Innovation presentation including the: a) ISCF Healthy Ageing Challenge and the b) evaluation requirement considerations	George MacGinnis Melanie Knetsch
14:40	Supplier Questions & Answers	All
15:15	UK SBS Procurement Process	UK SBS
15:35	Supplier Questions & Answers	All
15:55	Summary, what next	Neil Dixon
16:00	Close	

# ISCF Healthy Ageing Challenge



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- Welcome**
- Housekeeping**
- Formalities**
  - Without commitment
  - Seeking to inform and build the Healthy Ageing Challenge's Evaluation requirement so that it can be effective and realistic
  - Today is non-competitive
  - Notes (Q&A) taken to record event; slides and notes will be shared with the tender documents when it is live.
  - Should there be a need to provide further information to interested parties we will do so

## UKRI: Who We Are



UK Research  
and Innovation

- ❑ UK Research and Innovation (UKRI) is a new entity established in 2018 that brings together nine partners to create an independent organisation with a strong voice for research and innovation, and a vision to ensure the UK maintains its world-leading position in research and innovation.
- ❑ UKRI operates across the whole of the UK with a combined budget of more than £7 billion. We work in partnership with universities, research organisations, businesses, charities, and government to create the best possible environment for research and innovation to flourish.

## The Industrial Strategy Challenge Fund (ISCF)



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- ❑ The Industrial Strategy Challenge Fund (ISCF) aims to bring together the UK's world-leading research with business to meet the major industrial and societal challenges of our time and is being delivered by UK Research and Innovation (UKRI).
- ❑ The ISCF provides funding and support to UK businesses and researchers. The fund is part of the government's £4.7 billion increase in research and development over 5 years.

# Ageing Society Grand Challenge



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*People will enjoy **five more years of healthy, independent life** by 2035, whilst narrowing the gap between the experience of the richest and poorest (measured through improvements in disability-free life expectancy)*

- Across the EU, there were 199 million people aged 50+ who consumed €3.7 trillion of goods and services in 2015.
- If ranked among sovereign nations, the Silver Economy would be the third largest economy in the world, behind only the USA and China



Health & Care



Homes, Families &  
Communities



Work, Learning &  
Purpose



Finance & Economy

# The Healthy Ageing Challenge

- ❑ Aim to enable businesses, including social enterprises, to develop and deliver products, services and business models that will be adopted at scale which support people as they age.
- ❑ This will allow people to remain active, productive, independent and socially connected across generations for as long as possible.
- ❑ £98M investment over 5 years
- ❑ Broad scope supporting prevention and early intervention



# Healthy Ageing Challenge Investments



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## Community of Practice

### Research

- £8.6M
- Social, behavioural and design research
- Multi-disciplinary, multiple institutions

### Investment Accelerator

- £29M + match
- Individual innovations with clear potential to be adopted at scale

### Trailblazers

- £40M + match
- Larger 'service integration' collaborations
- Impact at scale

## Early Stage Pipeline



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# **The Evaluation Budget**

## **Maximum £600k**

# HA Evaluation



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UKRI is seeking to commission an independent evaluation of the Healthy Ageing programme to demonstrate:



**The extent the aim and objectives have been reached throughout the life of the programme**



**How the programme can predict what impacts might happen by 2035 and to recommend what data we need to achieve this**



**The extent to which the process and design of the programme has had in enabling the aims and objectives to be achieved**

# HA Evaluation



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**How the programme can predict what impacts might happen by 2035 and to recommend what data we need to achieve this**



**The extent to which the process and design of the programme has had in enabling the aims and objectives to be achieved**



## HA Evaluation (challenge level)



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### The objectives of the Evaluation are to:

1. Identify the extent to **which businesses**, including social enterprises, have developed and delivered products, services and business models **that have been adopted at scale** which support people as they age
2. Identify the extent to which this **has allowed people to remain active, productive, independent and socially connected** across generations and for as long as possible
3. Identify the extent to which, through the HA challenge, **government funding has brought together UK businesses and researchers** to support people to stay in their homes for longer, tackle loneliness, and increase independence and wellbeing.

## HA Evaluation (activity level)



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### The objectives of the Evaluation are to:

4. Determine the extent to which the activities **have implemented their planned activities** and **achieved their planned impacts**.
5. Determine the extent to which the activities have enabled **self-sustaining, near to market propositions** which have clear potential **to move to scale and spread to new markets**.
6. Determine the extent to which the activities have **stimulated consumer markets** in the UK by enabling business-led consortia **to develop large-scale markets** for healthy ageing services and products.

## HA Evaluation (challenge level)

### The objectives of the Evaluation are to:

8. Determine the extent to which the programme has **attracted private investment** to drive onward business growth
9. Determine the extent to which the programme has made the most of the **UK's strengths**, particularly in **design and manufacturing**, to attract inward **investment**.
10. Determine the extent to which the programme has **stimulated economic growth** in the UK by enabling UK-based companies to **exploit global** markets for healthy ageing **services and products**.
11. Determine the extent and nature to which the HA programme design, including the challenge activities, governance and UKRI management, has facilitated **interest, engagement, new collaborations** and contributed to achieving the objectives of the programme (**a process evaluation**).

## Defining impact



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**Impact is the demonstrable contribution that excellent research makes to society and the economy**

<https://www.ukri.org/innovation/excellence-with-impact/>

- Economic
- Societal
- Academic

## Defining impact



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# Evaluation design

*Working with us and key investments throughout*

**Challenge Director**

- Benefits map
- Challenge level indicators

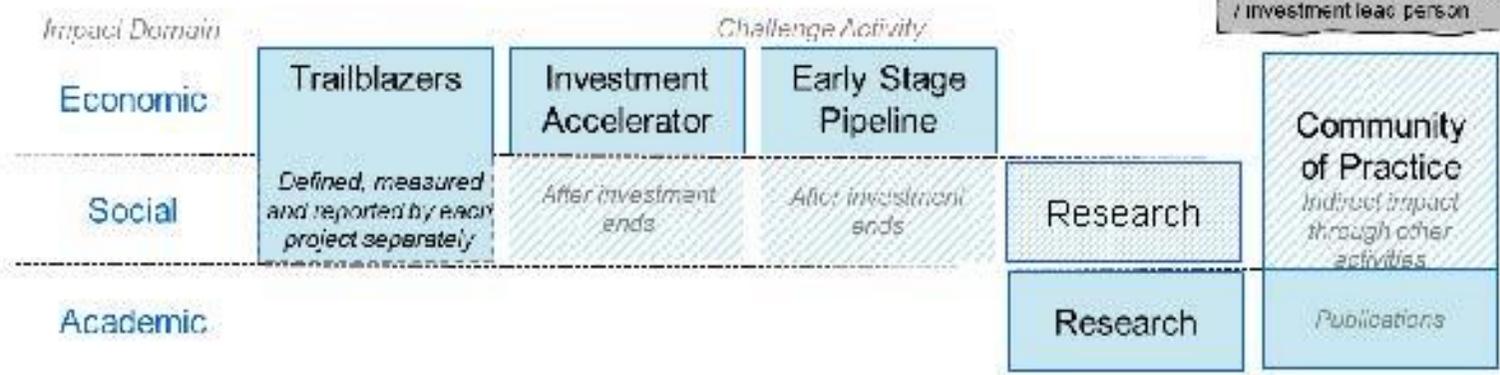
**Independent Evaluation**

- Challenge design
- Challenge implementation process
- Challenge economic impacts
- Trailblazer social impacts

**Supporting Activities**

- Project Monitoring
- Define framework for
- Reporting of social impacts by individual Trailblazer projects

Each activity has a monitoring / investment lead person



## HA Independent Evaluation - Methodology



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1. **It is anticipated a variety of methods will be used.**
  - i. Bidders are expected to identify and justify the most appropriate method(s) and propose approaches to evidencing attribution, and Healthy Ageing programme contribution to the UK R& D landscape.
  - ii. The methods are expected to also provide insights to the existing evidence and sector baselines, and a counterfactual baseline of comparative businesses
2. **Bidders are encouraged to think innovatively** in terms of how they propose to address the evaluation aims
  - i. Innovation should not be to the detriment of robustness.
  - ii. The funding partners are keen to push boundaries in their evaluations, in order to improve the quality of their evidence base.
3. It is anticipated that **societal impacts will most likely be** captured through qualitative approaches.
4. The need to evidence **robustness of data and indicators**
5. **Consortia bids** are welcome!

## Evaluation – expected deliverables

## Phase 1 - Evaluation Framework Development



### **At the end of the first four months (*end October 2020*):**

1. set out the intended approach to evaluation in detail; lays the agreed groundwork for the evaluation
2. draws on evidence from UKRI and HA activities and wider evidence as identified by the supplier

### Deliverables:

- **Workshops (inception, validation workshops)** with key programme stakeholders and subject matter expertise to validate understanding of the programme and evaluation framework
- **Evaluation Framework Inception Report** that covers the above requirements
- Meeting to go through the Inception Report

## Phase 2 – Baseline measurement



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To be completed **by 6 months after of the start of the evaluation (January 2021)**

- focusing on constructing the baseline for measuring the impact of this programme
- regular contact with the HA team lead

Deliverables:

- Phase 2 will likely run alongside Phase 1 and will help create evidence for the Inception Report
- **Workshop(s)** with key programme stakeholders to present and validate high level findings and report structure and to present and validate proposed baseline measures
- **Baseline Report** with the baseline measures in relation to all relevant research questions, as outlined in the Evaluation Framework Inception Report, along with any challenges encountered in relation to capturing these baseline measures

## Phase 3 – Data collection, analysis and reporting



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**Implementation** of the evaluation framework developed in phase 1

1. including any ongoing survey data collection and analysis – against the HA Programme (evaluation) objectives
2. including a robust assessment of any additional impact of the programme and investments
3. Plan for regular contact with the HA team lead

Deliverables:

**□ Phase 3 involves the delivery of three reports:**

- Process evaluation report (date to be agreed)
- Interim evaluation progress report (tbc – May 2021)
- final impact evaluation report – including insights on what is needed if further evaluation on the impact of the investments and programme were to happen beyond Dec 2023 (draft due July 2023)

## Bidders Profile

- Successful bidders should be able to demonstrate:
  - How they will **provide evidence against the objectives**, and broader impacts if arise
  - Expertise in undertaking **complex evaluations** of government or societal based programmes related ideally to healthy ageing and market developments
  - Expertise in facilitating/enabling **learning networks**, particularly within communities where there are high degrees of heterogeneity, large numbers of stakeholders and a wide geographical spread to inform an **ongoing shared approach to the evaluation**
  - A breadth of **appropriate capabilities** for measuring developing, and taking to market, new service propositions for older people and awareness of (and solutions to!) the challenges involved
  - Access to a broader network of the **wider relevant capabilities** needed to deliver the evaluation
  - The ability to make use **engaging methods** (eg graphic visualisation) in reports/presentation and any data sets that are collected
  - Consortia bids are welcome!



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Q & A  
*Until 3:35pm*

# Procurement Information

# UK Shared Business Services (UK SBS) Ltd



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- UK SBS brings a commercial attitude to the public sector
  - Helping Contracting Authorities to improve efficiency, generate savings and modernise
- Our broad range of expert services is shared by our Contracting Authorities
  - Allowing our customers the freedom to focus resources on their own core activities
- Core services include:
  - Procurement, Finance, Grants Admissions, Human Resources, Payroll and ISS
- We are a people rather than task focused business
  - It's what makes us different to the traditional transactional shared services centre.
- A not-for-profit organisation owned by BEIS
  - Our goals are aligned with the public sector to deliver best value for the UK taxpayer
- UK SBS currently manages £700m expenditure for its Contracting Authorities



# Procurement Process



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Market engagement is being conducted using a Prior Information Notice (PIN) issued via Tenders Electronic Daily (TED) and Early Engagement Notice released on Contracts Finder (CF).

Pre-Procurement  
Market Activity  
(Supplier  
Engagement Day)

• 5 February 2020 - London

A Contract Notice will be issued via TED and Contracts Finder to launch an Open OJEU tender procedure.

## Timetable (as an example)



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### Open OJEU Tender Procedure:

Activity	Date
Tender Launch	02/03/2020
Clarification deadline	27/03/2020
Clarification response	01/04/2020
Deadline for submissions	24/04/2020
Tender results issued	14/05/2020
Standstill starts	14/05/2020
Standstill ends	25/05/2020
Contract awarded	25/05/2020
Proposed contract start date	01/06/2020



## Procurement e-Tendering System: Delta



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- For those of you who may have previously bid for UK SBS led tenders, please note that we no longer use the Emptoris system.
- UK SBS now use Delta eSourcing - guidance on registration with Delta will be released with the notice.



## Submission of Bids



- Once the contract notice is issued, the Supplier will need to follow the instructions within the notice to be invited to participate in the tender process (registration alone does not permit access to any tender exercises, nor does attending the supplier day)
- All communications, including tender documentation clarifications, should be submitted via Delta
- All bids are to be submitted via Delta
- Submission Requirements:
  - A full detailed response to the questions
  - All questions must be answered
  - All required evidence – for some questions bidders might need to provide supporting documentation as evidence, it will be made clear within the bidder guidance of each question where this is applicable.
  - Completed pricing schedule
  - We require that all prices provided are in GBP. We will only accept bids submitted in GBP.



## Summary



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- Today's slides, minutes, questions and answers will form part of the tender pack. This will be available with the Tender documents published so that the information is accessible to non-attendants of today who may also wish to bid.
- Please note the timescales mentioned above are estimates only, it is the supplier's responsibility to look out for the opportunity notice on Contracts Finder and TED.





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## Next steps

- Take on board feedback from today (please send any additional thoughts / feedback to UK SBS at [professional.services@uksbs.co.uk](mailto:professional.services@uksbs.co.uk))
- Work to finalise the specification and tender documentation
- Anticipated tender go live in March 2020

# Q & A

## **Open discussion with participants**

### **Q - UKRI asked whether the £600k budget is feasible?**

A – From what is set out in the phasing it is a broad range. It was clarified what does the baseline look like? To which UKRI responded *“There will be 6 Trailblazers next year who are agile in their approach. There is 1(one) accelerator with a tranche of investment let over 3 (three) years and completed within 4 (four) years”*. *It will be one LOT with x3 evaluators, Consortium Bids are welcome.*

Feedback from the day was that the suppliers are nervous of the expectations in terms of the outputs and relationships with the Trailblazers.

### **Q – How flexible and agile is the requirement?**

A – *The requirement is ‘front loading’ phase 1 and 2. There is a broad range of activities in the portfolio. UKRI need to ensure the specification is correct and captures all outputs required.*

### **Q – What proportion of activities are Digital / Services**

A – *UKRI believe that the Digital and Innovation may be incorporated via the Investment Accelerator Services.*

### **Q – To what extent are the Trailblazer sites operational?**

A – *The Trailblazers are currently in their first phase of discovery (readiness to implement). The Partnerships and Agreements are already in place.*

*In terms of the Evaluations, UKRI are clear on the populations – one of the roles is to seek common themes and a bespoke approach to their themes.*

*This is not about medical but evaluation.*

### **Q – Will we be capturing data as pilots are developed?**

A - *UKRI have established methods of collating data with the Trailblazers. The data is accessible within the public domain.*

### **Q – Is there an expectation for the Trailblazers to feed into the evaluations?**

A – *The Trailblazers may need complementary information from the Investment Accelerator for example:*

- *Are they managing investments?*
- *Are we seeing other investors entering the market?*

**Q – What is the Timeline for the Trailblazers?**

*A – By June 2020 UKRI will know and have contracted with the 15 Stage 1 Trailblazers (Housing and Social Connections).*

*By February 2021 UKRI will know their 6 Trailblazers but not contracted. It is hoped that the Evaluation Partners will be identified by June 2020.*

**Q – Is there an anonymised example of the Trailblazers bid?**

*A – No, UKRI have received a mixture of responses from large firms, small firms, eco systems, public sector (excluding academics) for example:*

- *Better design ‘Meals on Wheels’*
- *Better technology for Healthy Aging Market.*
- *How energy data can be better utilised*

*Suppliers will need to look at the scope areas and determine whether the data sets meet the objectives.*

**Q – UKRI have ruled out RTC – Why?**

*A – UKRI haven’t ruled out RTC’s – if they chose to submit a bid then these would be taken into consideration along with any other bid submitted. UKRI had looked at previous methodology and it did fail on that occasion to achieve the desired outcome.*