



# **FRAMEWORK AGREEMENT FOR THE PROVISION OF GOODS AND/OR SERVICES**

**Agriculture and Horticulture Development Board**

**and**

**Qa Research Ltd**

**Ref: 2019-399**

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

## **FORM OF AGREEMENT**

**THIS FRAMEWORK AGREEMENT IS MADE ON 20<sup>TH</sup> NOVEMBER, 2020**

### **BETWEEN**

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

### **AND**

**Qa Research Ltd**, [REDACTED] ('**the Supplier**')

AHDB and the Supplier are the Parties to this Framework Agreement.

### **WHEREAS**

- A. AHDB wishes to acquire the provision of Evaluation support for Lot One, as per the AHDB specification.
- 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 7),
  - Annex 2 (Specification Details, page 8) read with the Appendix thereto;
  - Annex 3 (Ordering Procedures, page 59);
  - Annex 4 (Call-Off Contract Template, page 61);
  - Annex 5 (AHDB Terms, page 62)

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 15<sup>th</sup> January 2021 ('Commencement Date').
- 7.1. The Framework Agreement shall terminate on 14<sup>th</sup> 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 five 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.

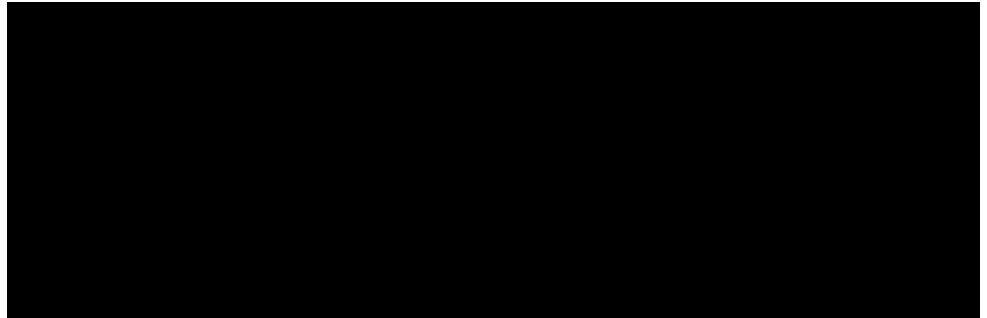
*- The remainder of this page is deliberately blank -*

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

Signature:

Name of signatory:

Date:



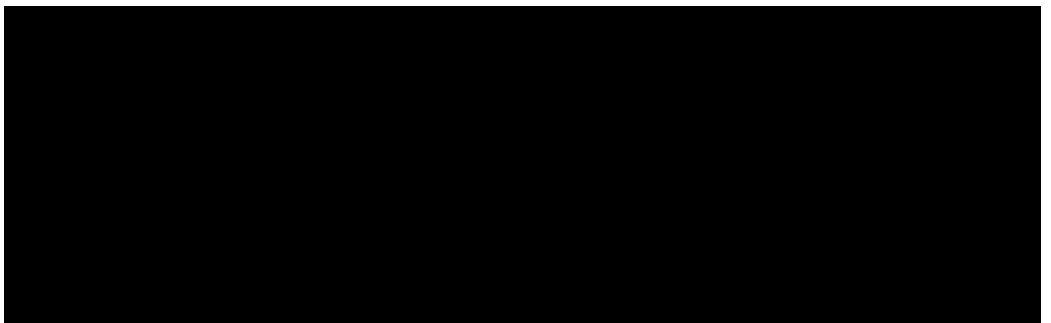
4 January, 2021

**Signed for and on behalf of the Supplier:**

Signature:

Name of signatory:

Date:



18/12/ 2020

## **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]  
[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])  
[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 58.
- 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)

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:
  - o name and full contact details of the project manager who would be leading any projects
  - o relevant experience of project manager
  - o role and name of key members of proposed staff to be involved in any projects
  - o CVs for key members of staff to be involved with any projects
  - o 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 30<sup>th</sup> 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 23<sup>rd</sup> 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

Supplier:	<p>The supplier should be able to demonstrate:</p> <ul style="list-style-type: none"> <li>• A track record in evaluation consultancy</li> <li>• Experience of working within the agricultural sector</li> <li>• An understanding of GDPR and its compliance</li> </ul>
Interim report	<ul style="list-style-type: none"> <li>• 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.</li> <li>• 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</li> </ul>
Resources for interim evaluation:	<p>The following are available now:</p> <ul style="list-style-type: none"> <li>• AHDB strategy 2017-2020</li> <li>• Pork KE Investment test business case and feedback</li> <li>• 1<sup>st</sup> year (2018) results from Farm Excellence Impact Survey and cost benefit analysis from year 1</li> <li>• 2018/19 technical events feedback form evaluation</li> <li>• Precision Pig awareness, uptake and benefits/barriers baseline survey</li> <li>• PigPro reports on uptake to date</li> <li>• EUPiG phase 1 report (covering 18mths of delivery)</li> </ul>
End of programme evaluation	<ul style="list-style-type: none"> <li>• 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</li> <li>• Recommendations should be made on future KE activity and ways to improve delivery</li> </ul>
Resources for end evaluation:	<p>The following will become available:</p> <ul style="list-style-type: none"> <li>• 2<sup>nd</sup> and 3<sup>rd</sup> year (2019 and 2020) results from Farm Excellence Impact Survey and cost benefit analysis</li> <li>• 2019-2021 technical events feedback form evaluation</li> <li>• Precision Pig awareness, uptake and benefits/barriers repeat survey</li> <li>• PigPro reports on uptake to date</li> <li>• EUPiG end of programme reports</li> </ul> <p><i>This isn't an exhaustive list and other evidence, case studies etc will be available</i></p>
Industry Stakeholders and	<ul style="list-style-type: none"> <li>• 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</li> </ul>
AHDB Staff	<ul style="list-style-type: none"> <li>• Face to face meetings can be undertaken, or attendance at team meetings to ask questions to help inform the evaluation can be made</li> </ul>
Report Template	<ul style="list-style-type: none"> <li>• Please provide a suggested template for the evaluation report</li> </ul>
Project Plan	<ul style="list-style-type: none"> <li>• Please provide a project plan, covering the production of the interim and end of programme report</li> </ul>

Timings	<ul style="list-style-type: none"> <li>• The interim report should be done in Jun-Aug 2019 and made available by end Aug 2019</li> <li>• The full end of programme evaluation should be carried in April/May 2021 and made available by end June 2021.</li> <li>• Invoicing should be after completion of each report</li> </ul>
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## 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

<p>3.1 Research Objectives</p>	<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"> <li><i>i. Awareness of FEP</i> <ul style="list-style-type: none"> <li><i>o How did they find out about the FEP?</i></li> <li><i>o When did they find out?</i></li> </ul> </li> <li><i>ii. Involvement with FEP</i> <ul style="list-style-type: none"> <li><i>o Why did they choose to get involved in the FEP?</i></li> <li><i>o What was their aim for attending?</i></li> </ul> </li> <li><i>iii. Uptake of FEP</i> <ul style="list-style-type: none"> <li><i>o How many FEP events have they attended?</i></li> <li><i>o What has been their uptake of any resulting products/services?</i></li> </ul> </li> <li><i>iv. Learning</i> <ul style="list-style-type: none"> <li><i>o What key messages have they taken from attending FEP events?</i></li> <li><i>o What skills have they improved following attendance at FEP events?</i></li> </ul> </li> <li><i>v. Change</i> <ul style="list-style-type: none"> <li><i>o Have they made any changes following attendance at FEP events?</i></li> <li><i>o If yes, what and why?</i></li> <li><i>o If no, do they intend to make any change?</i></li> <li><i>o Or if no, why not?</i></li> </ul> </li> <li><i>vi. Benefits (economic, social, environmental)</i> <ul style="list-style-type: none"> <li><i>o Perceived benefits of making change</i></li> <li><i>o Realised benefits of making change (economic quantification where possible and considering timescale of farming year)</i></li> <li><i>o Will they continue to realise benefits into the future?</i></li> </ul> </li> <li><i>vii. Satisfaction</i> <ul style="list-style-type: none"> <li><i>o Did the FEP events / meetings achieve their objectives?</i></li> <li><i>o Changes they think could be made to the FEP</i></li> </ul> </li> <li><i>viii. Recommendation</i> <ul style="list-style-type: none"> <li><i>o Would they recommend the FEP (scale 1 – 10)?</i></li> <li><i>o Net Promoter Score</i></li> </ul> </li> </ul> <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>
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<p>3.2 Approach Sampling</p>	<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> <ul style="list-style-type: none"> <li><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 development and will have varying levels of activity in the four key components illustrated in Appendix 1.</i></li> <li><i>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.</i></li> <li><i>iii. The FEP is increasingly linked to, or represented by, digital resources, tools &amp; media which may be the main or only point of access for some levy payers and stakeholders.</i></li> <li><i>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).</i></li> <li><i>v. Sampling should be based on producers and growers that have actually attended FEP meetings &amp; 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).</i></li> </ul>
<p>3.3 Database</p>	<p><i>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.</i></p>
<p>3.5 Quality Control</p>	<p><i>The proposal should demonstrate a process for quality control and adherence to MRS code of conduct.</i></p>

	<i>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.</i>
<b>3.6 Additional Information</b>	<p><i>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.</i></p> <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></p>
<b>3.8 Deliverables</b>	<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 &amp; powerpoint presentation delivered at AHDB offices for each of the Y1, Y2 &amp; 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>

## Supplier proposal

### 1 I.2.1 APPROACH, OBJECTIVES AND DELIVERY

***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%)***

#### 1.1 About Qa Research

Qa has, throughout its 30 year history, undertaken evaluations on behalf of clients in the private, public and third sectors, on topics ranging from children and families, through socioeconomic interventions and cultural programmes, to evaluations of public spending by local authorities. As such, we are highly experienced in using a variety of evaluation and research methods and applying these to fulfil our clients' varying needs.

In addition to our expertise in evaluation, we are also a preferred supplier to the Agriculture and Horticulture Development Board (AHDB) for research and market intelligence services and therefore understand your business and have a great insight into the levy payers that you serve, their views, the need for them to see value for money and, critically, how to engage these key stakeholders in research and evaluation activity.

#### Levels of Evaluation Support

We are happy to offer evaluation services that take projects right from brief to dissemination, or to offer services to support and complement any work being undertaken in-house by AHDB.

We note that evaluation is a new discipline to many areas within AHDB and, as such, that a varying degree of support might be required from an evaluation supplier. We also understand that evaluation activity will be undertaken internally to a lesser or greater extent, dependent upon the programme or project being evaluated.

We believe that AHDB might undertake projects where a totally independent evaluation will be most appropriate, and projects for which internal collection of evaluation data from stakeholders for later analysis will be vital to an evaluation's success; we are happy to meet your requirements on a commission-by-commission basis, whatever the balance of responsibility.

## **Types of Evaluation**

Qa have experience of undertaking both formative and summative evaluations on behalf of a diverse range of clients, and appreciate the importance of both in an effective evaluation strategy.

### ***Summative evaluations***

Undertaken at the end of the life of a project, programme or intervention, summative evaluations provide a view on the overall success of that undertaking, based on an agreed set of quality or success indicators for the planned activities/deliverables, outputs, and outcomes (which may be categorised as short-, mid-, and long-term). We often refer to this as 'impact evaluation'. Learnings from such an evaluation not only measure the success achieved, but might also offer insights into how to maximise success in future practice by replicating or avoiding specific practices (process evaluation).

### ***Formative evaluations***

By contrast, these evaluations tend to focus on the process or delivery elements and are conducted during the lifecycle of a project or programme in order to glean an understanding of its ongoing effectiveness, with a view to potentially modifying delivery in-term in a timely way, to maximise effectiveness and, ultimately, the impact. Such evaluations may also assist with interim reporting of progress towards delivery targets and planned outputs (and outcomes).

## **Developing Evaluation Plans (Impact Evaluation)**

Whilst your Evaluation Framework Specification states that evaluation plans will often be in place at the point of commission, we are able to develop evaluation plans on behalf of, or in collaboration with, AHDB as required. As above, an independent evaluation might necessitate the creation of an evaluation plan externally or a lack of experience in evaluation amongst specific AHDB departments might lend itself to the co-creation of the overarching evaluation plan for any project or programme.

Critical in the design of an evaluation plan is a depth of understanding about a programme or project's structure, timescale, and delivery plan. These elements are often combined in a logic model, or theory of change, which diagrammatically represents the project or programme in its entirety, identifying the context in which the programme is being delivered, the resources available (inputs), planned activities within the programme, as well as the deliverables (or outputs) of the project and the changes (or outcomes) it seeks to effect. Qa would use this comprehensive theory of change as the basis of any evaluation plan.

The theory would be used to create a framework for the evaluation; with indicators (often referred to as performance targets/indicators, or KPIs) being assigned to each of the planned activities, outputs and outcomes. These indicators would define success for each element of the programme and for each indicator we would develop or assign associated measures and tools that would be used to collect information to evidence whether or not targets had been met and desired outcomes achieved. These tools might be surveys, numeric or qualitative stakeholder feedback, fiscal data and measures, or standardised measures of outputs. We would work with you to understand and develop the most appropriate tools to measure AHDB's intended outputs and outcomes.

In line with the framework, we would work with you to develop data collection requirements, and identify whether these requirements would be met by AHDB or whether Qa and our evaluation partner would be required to fulfil these. The below section on 'Evaluation Methods' details data collection methodologies that we often use when undertaking evaluations for our clients.

## **Process Evaluation**

As well as measuring the success of a programme in terms of its outputs and outcomes, we are also adept at undertaking process evaluations to help our clients understand *how* and *why* they have achieved success or, in underperforming programmes and projects, to understand why targets have not been met or objectives not achieved.

Such process evaluations often require critical reflection on the part of the stakeholders involved in the project, both within the programme teams and more widely. Qa has experience of undertaking such evaluations with a wide range of client organisations, across many sectors, acting as monitoring, evaluation and learning (MEL) partner. Our outputs from these evaluations focus on actionable insights, suggestions for improvement, and confirmation of critical and functional elements of programme delivery.

Please see the later documents 1.2.2 and 1.2.3 to understand our expertise in delivering process and impact evaluations.

## **Evaluation Methods**

In undertaking evaluations we utilise a range of methods, from collecting primary quantitative data through analysing existing data sources provided by our clients, to undertaking qualitative interviews and focus groups in order to collect opinions and perceptions from clients' stakeholders and customers. We combine these methods in order to give the most comprehensive picture possible from the evaluation, measuring the success, or otherwise, of all elements of a programme of work or intervention. The combination of methods required will depend upon the nature of the programme, the evaluation outcomes sought and budget.

## **Quantitative Methods**

### ***CATI, CAWI and CAPI***

Qa have a great deal of experience undertaking quantitative survey research with businesses and members of the public, and certainly within the agriculture and horticulture sectors. Surveys and their samples are designed and developed by Qa and survey questionnaires programmed in house and hosted using our dedicated Askia survey software. Askia allows survey interviewing to then be operationalised using computer-assisted web interviewing (CAWI), telephone interviewing (CATI) by our dedicated in-house contact centre, or face-to-face, as required (CAPI) using our nationwide network of skilled and experienced field interviewers. Our experience working on behalf of AHDB tells us that telephone interviewing is particularly effective with your levy payers, where technological barriers might prevent engagement with other research approaches and, dependent upon the evaluation being undertaken, we would likely advocate for this approach to quantitative data collection.

Qa always then undertakes analysis of resulting survey data in house, with the project manager collaborating closely with a member of our ICT/analysis team during this phase of the research. Please see the later section on experience to understand how we have applied these various quantitative methodologies in undertaking evaluations on behalf of our clients.

### ***Analysis of secondary data***

As well as primary data collection, our evaluations often involve undertaking analysis of information that clients have collected throughout the life of a project, whether extracted from management information systems (MIS), collected from customers or membership, or from other administrative sources.

Our dedicated analysis team will work with you and the evaluation project manager to apply the most appropriate techniques in analysing the data, whether descriptive or inferential. We apply a number of statistical techniques to existing data sets, including analysing difference, regression techniques and cluster analysis, for example.

### ***Economic Analysis: Cost-Benefit Analysis and Return on Investment***

For evaluations requiring such economic analysis, Qa will collaborate with Professor Karl Behrendt of Harper Adams University. Karl joined Harper Adams University in January 2018, is the founding Director of the Global Institute for Agri-Tech Economics, and has over 20 years' industry experience in farm and agribusiness management consulting, extension and research. He holds a PhD from the University of New England (Australia) and is highly experienced in all areas of economic analysis as they relate to the agriculture sector.

## **Qualitative Methods**

To complement our quantitative data collection and analysis offer, Qa's Social Insight and Evaluation (SIE) team specialises in the collection of qualitative data to inform evaluations, using a range of approaches.

### ***In-depth interviews***

Qa's qualitative interviewers have undertaken a myriad projects based on in-depth interviewing techniques. Using an interview guide as the basis, always pre-agreed with the client, our skilled interviewers can elicit a depth of information from participants, whether members of the public or professional contributors. Whilst interview guides are always used to provide structure and ensure topic coverage, Qa's experienced interviewers will always probe for pertinent and valuable information during conversations, ensuring that clients glean the richest insight possible from qualitative interviewers.

In terms of modality, in-depth interviews can be undertaken in person face-to-face, over the telephone, or online using video interviewing depending upon the needs of the project, the nature of the topic under discussion, those to be interviewed and evaluation budgets. Qa has enjoyed high levels of success in undertaking video interviews during the current pandemic on behalf of a number of clients, across multiple sectors. We have enjoyed high attendance rates for this mode, offering recruited participants digital support before taking part to ensure that they are comfortable with the use of our online platform. Video interviewing can offer increased levels of engagement, resulting in higher quality insights. Further, the visual element offered in addition to telephone interviewing can add a further layer of detail to findings. However, in the case of projects that we have undertaken for AHDB, we have experienced better response to a more traditional telephone interviewing approach with levy payers. Again, we would discuss individual evaluation needs with you, but might advocate for this approach when undertaking evaluation fieldwork with levy payers specifically.

### ***Cognitive Testing***

Qa often applies cognitive interviewing techniques to the testing and development of survey questionnaires, especially where these are planned for self-completion and are complex in nature. This approach allows questionnaires to be designed and structured such that they are intuitive to use, and enables individual questions to be redesigned or reworded in order to allow greater levels of comprehension, or a more consistent interpretation of question wording. Where time and budget allows, cognitive testing is often undertaken as part of the questionnaire development phase of our research and evaluation projects. As for in-depth interviews, cognitive interviews can be undertaken in any modality and in line with the needs of the planned contributors.

### ***Focus Groups***

Applied to evaluations, focus groups can be undertaken to understand customer, member and other stakeholder perceptions of a programme or intervention and opinions about how well it has delivered its desired aims. Focus groups bring the benefit of stimulating conversation between participants, often leading to a greater depth of information and understanding of the strength and breadth of participants' viewpoints.

Qa has decades of experience of arranging, hosting and moderating face-to-face focus groups to collect qualitative information with a wide range of contributors on a vast array of topics; from prospective consumers and existing customers, through members of the public, to senior stakeholders and business decision makers. More recently, and particularly in response to the COVID-19 pandemic, Qa has developed and refined its online focus group offer. Using both consumer and business platforms, we are able to professionally facilitate focus group discussions, recording them for later playback and analysis.

### ***Qualitative analysis***

Irrespective of the method of data collection, following completion of fieldwork we will analyse the resulting qualitative data using a thematic framework approach. This involves listening/watching back recordings of interviews and focus groups, thematically coding the data, and transcribing any useful quotations.

We will consider and note areas of consensus, which themes recur frequently, and those points of view which were more unusual or where there was disagreement. Attention will also be given to differences between any contributor sub-groups. Analysis is completed by at least two researchers to avoid the introduction of any bias.

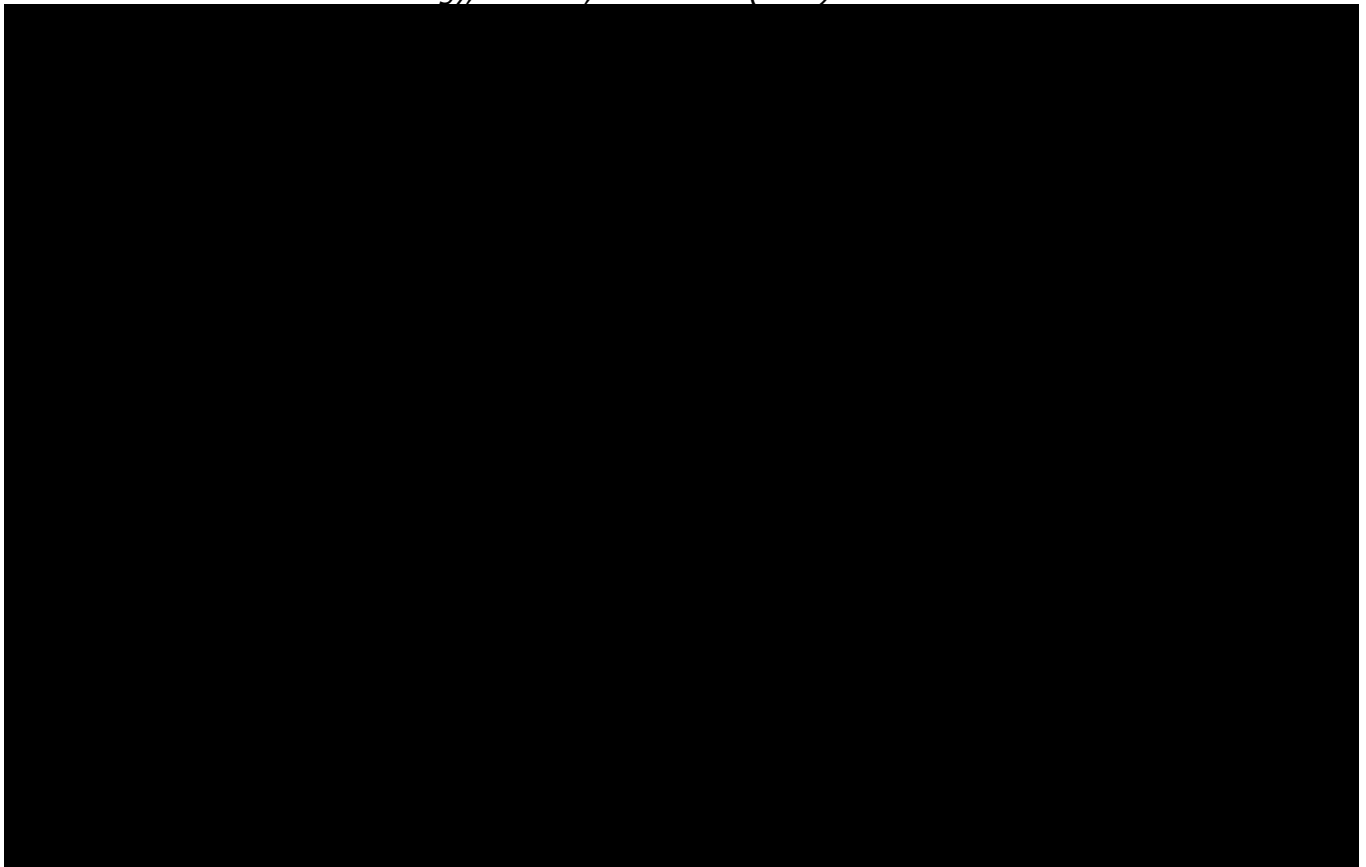
## Reporting

We will always discuss with you at the inception of any evaluation your needs and expectations for reporting. We appreciate that some evaluations will require comprehensive in-depth reports with a high level of detail and reference to data. Equally, we understand that others will need to culminate in, for example, a succinct set of actionable recommendations to be implemented in order to improve practice or maximise impact.

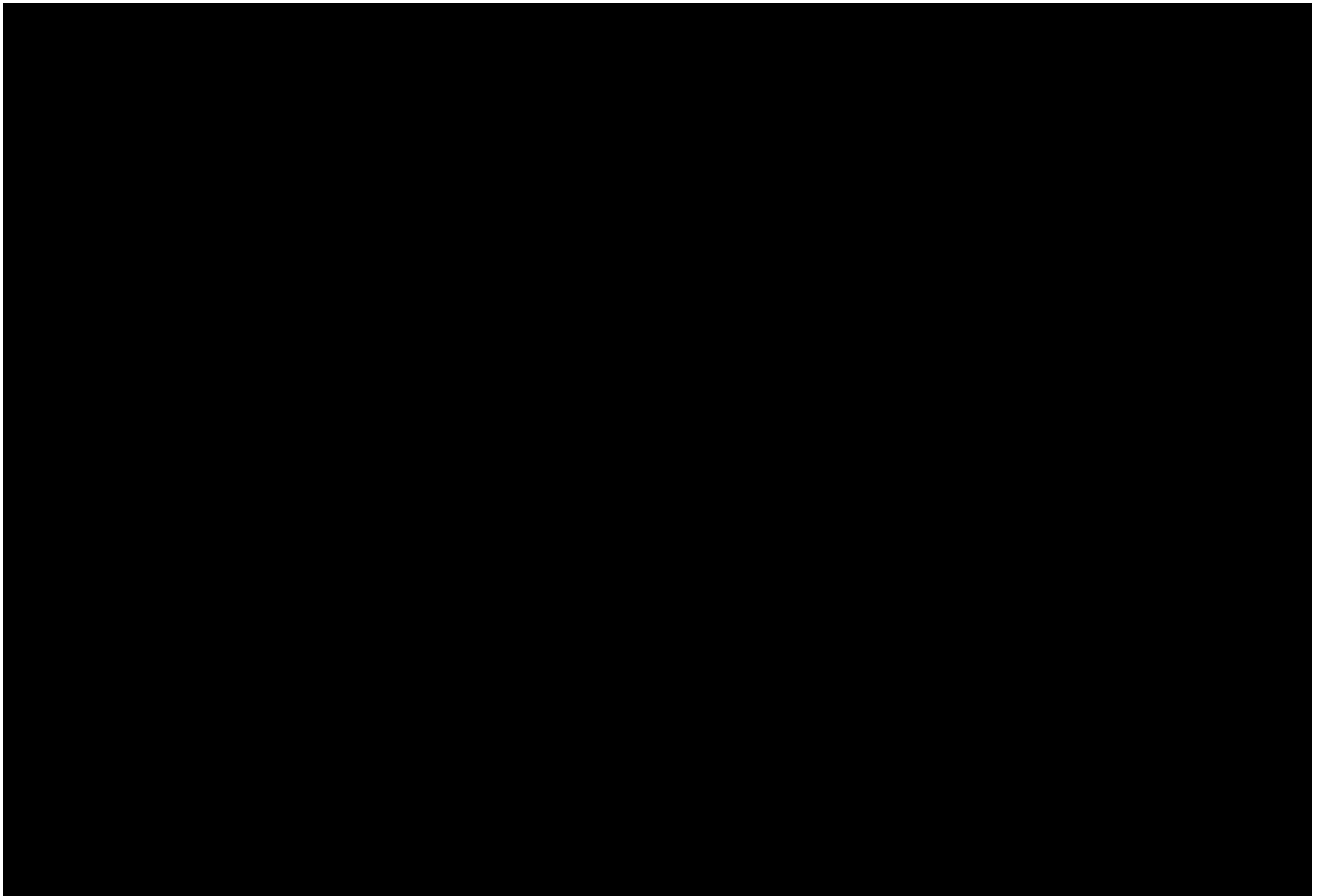
We can provide reports in the form of written documents, slide decks or even infographics, where appropriate, and always in line with your requirements and pre-agreed expectations.

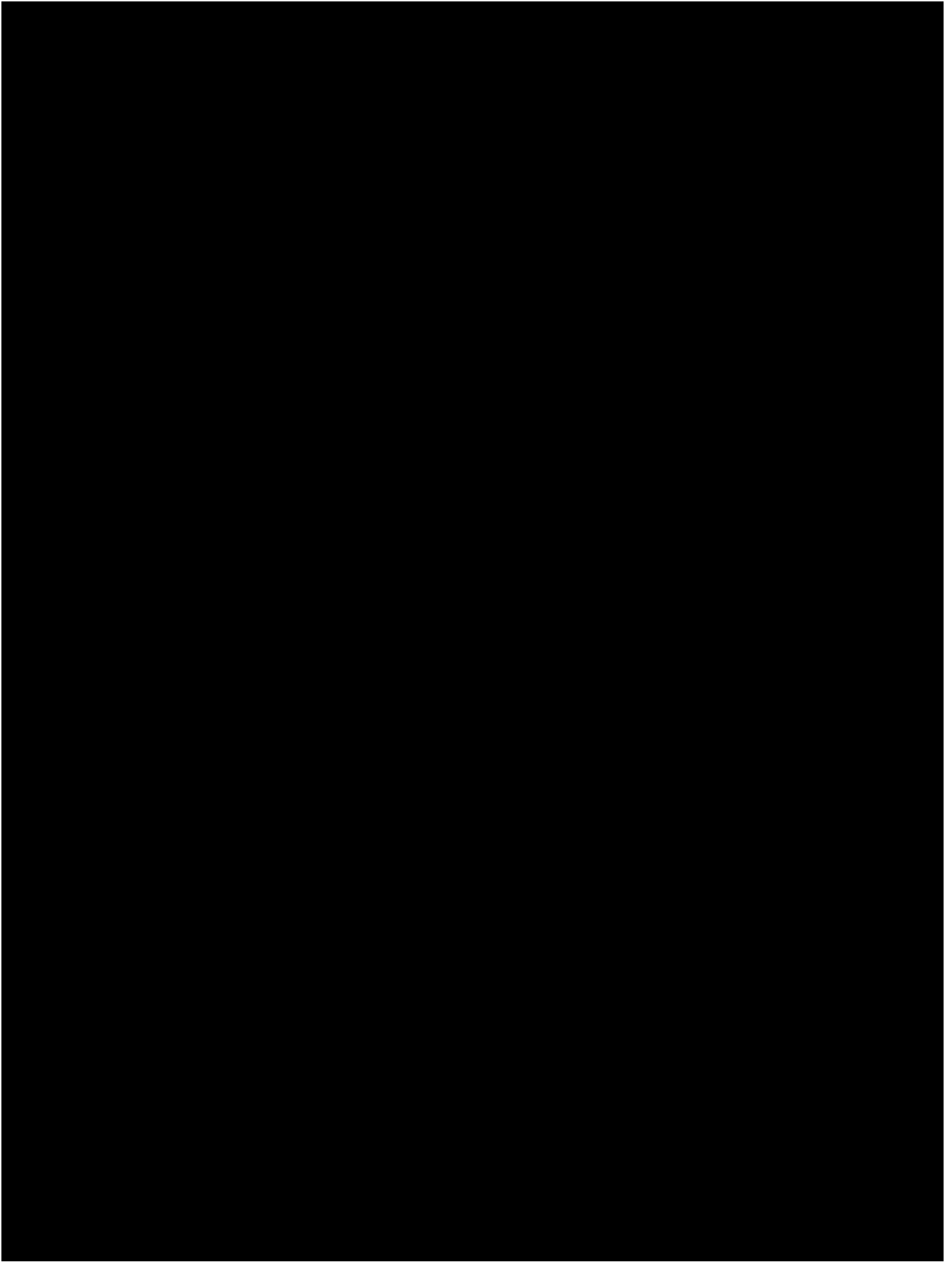
## 2 I.2.2 DETAILS OF PROPOSED ACCOUNT TEAM AND EXPERIENCE

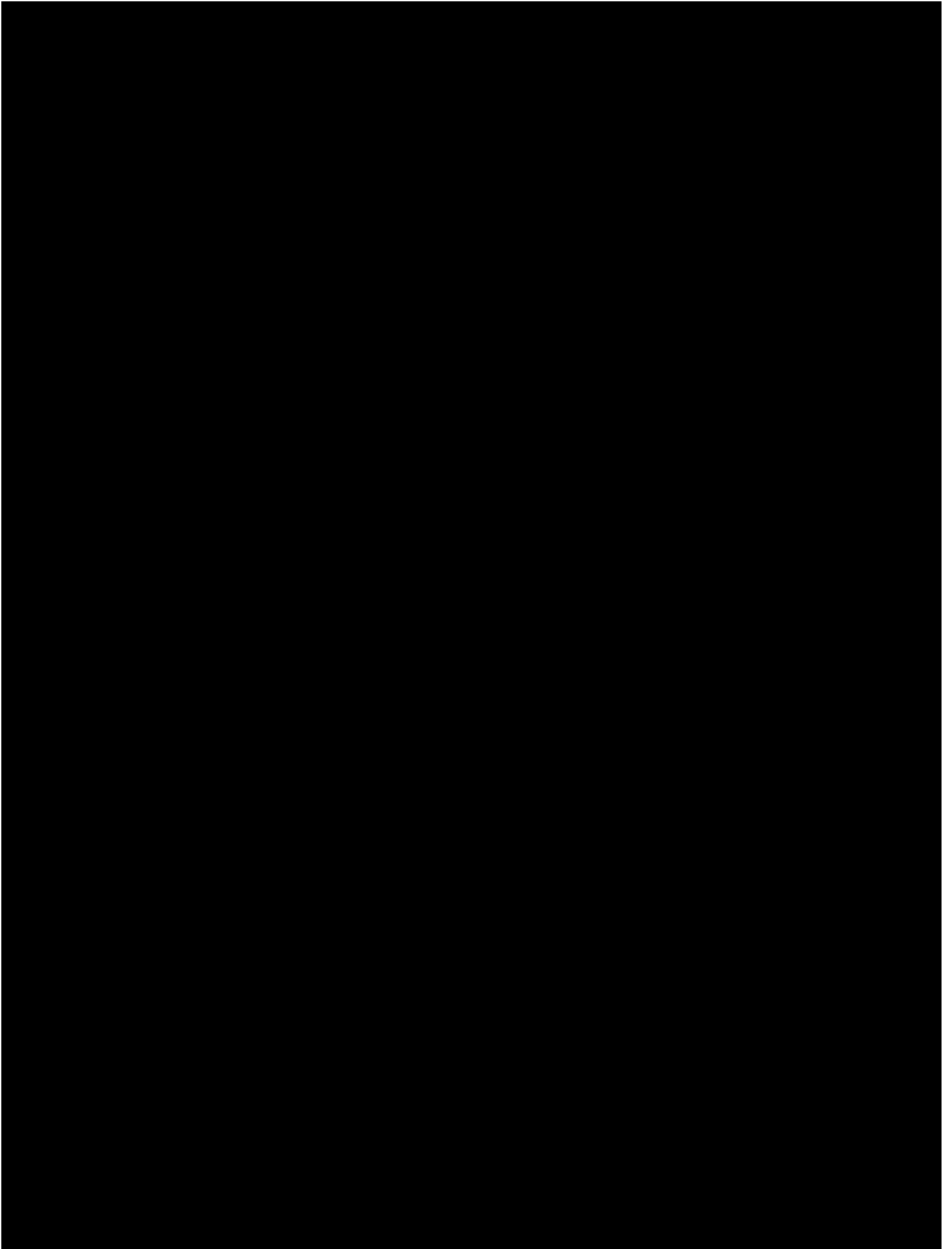
### 2.1 *Experience of project manager and supporting team in delivering similar projects in terms of methodology, location, sector etc. (20%)*

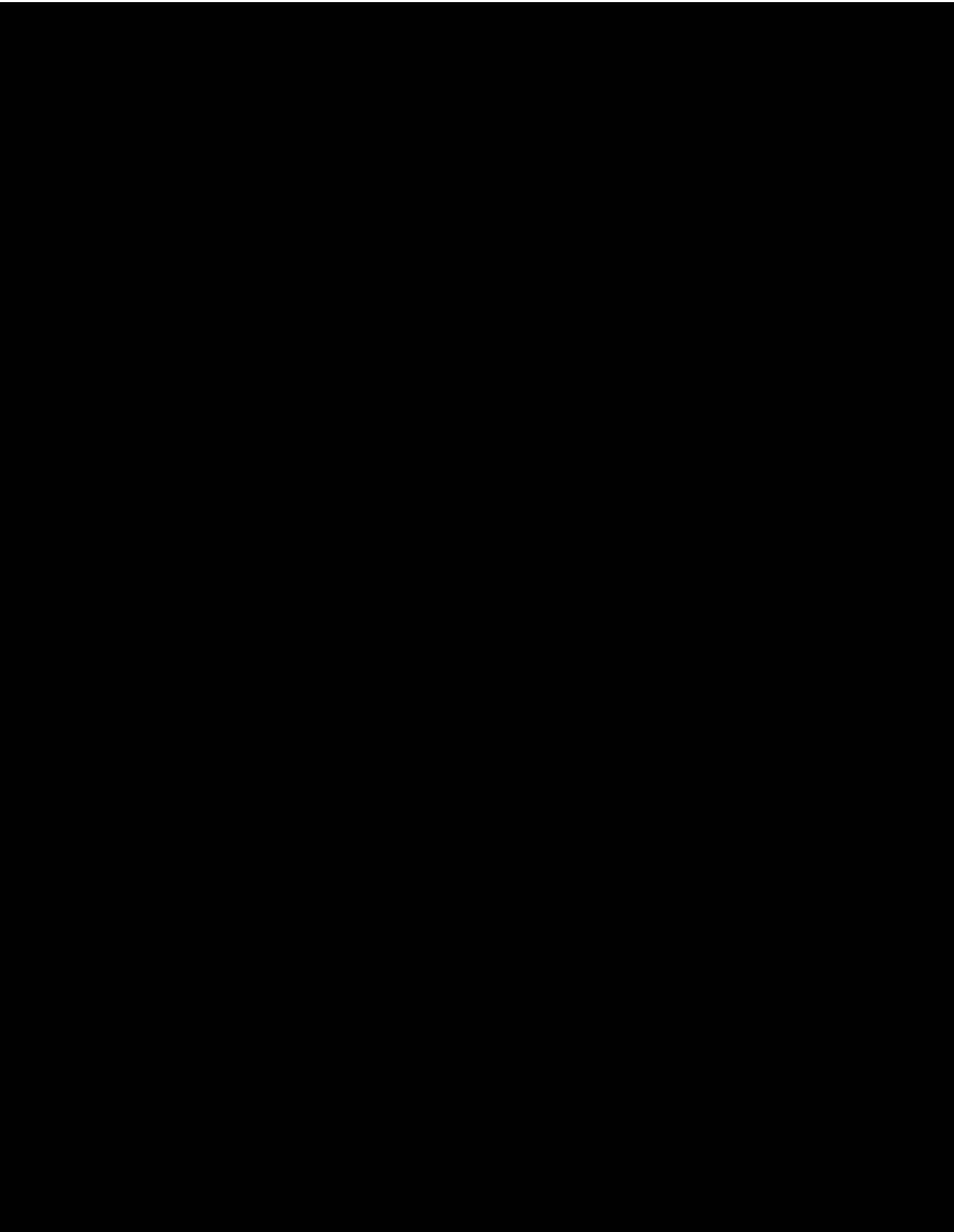


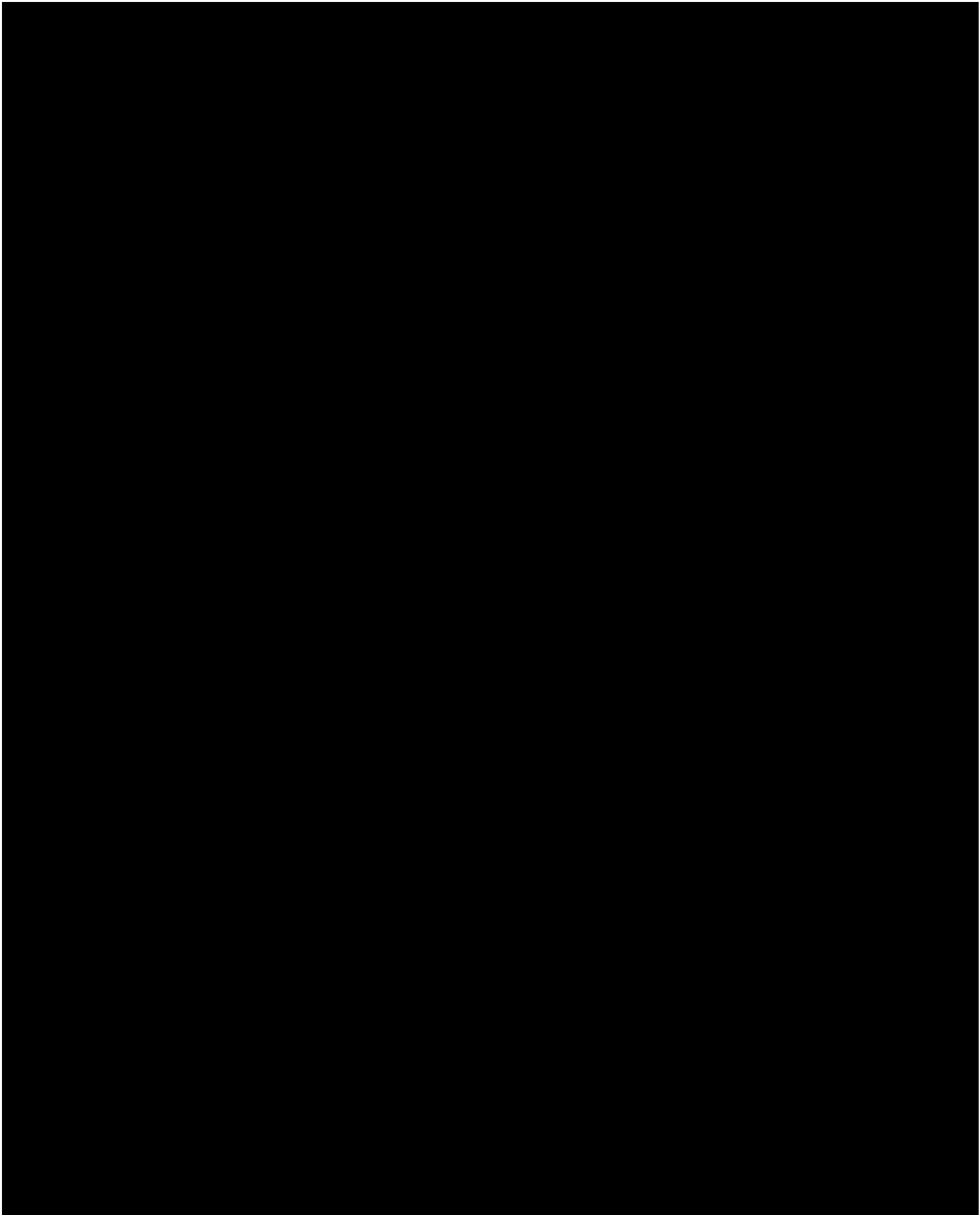














### 2.3 Staff Continuity

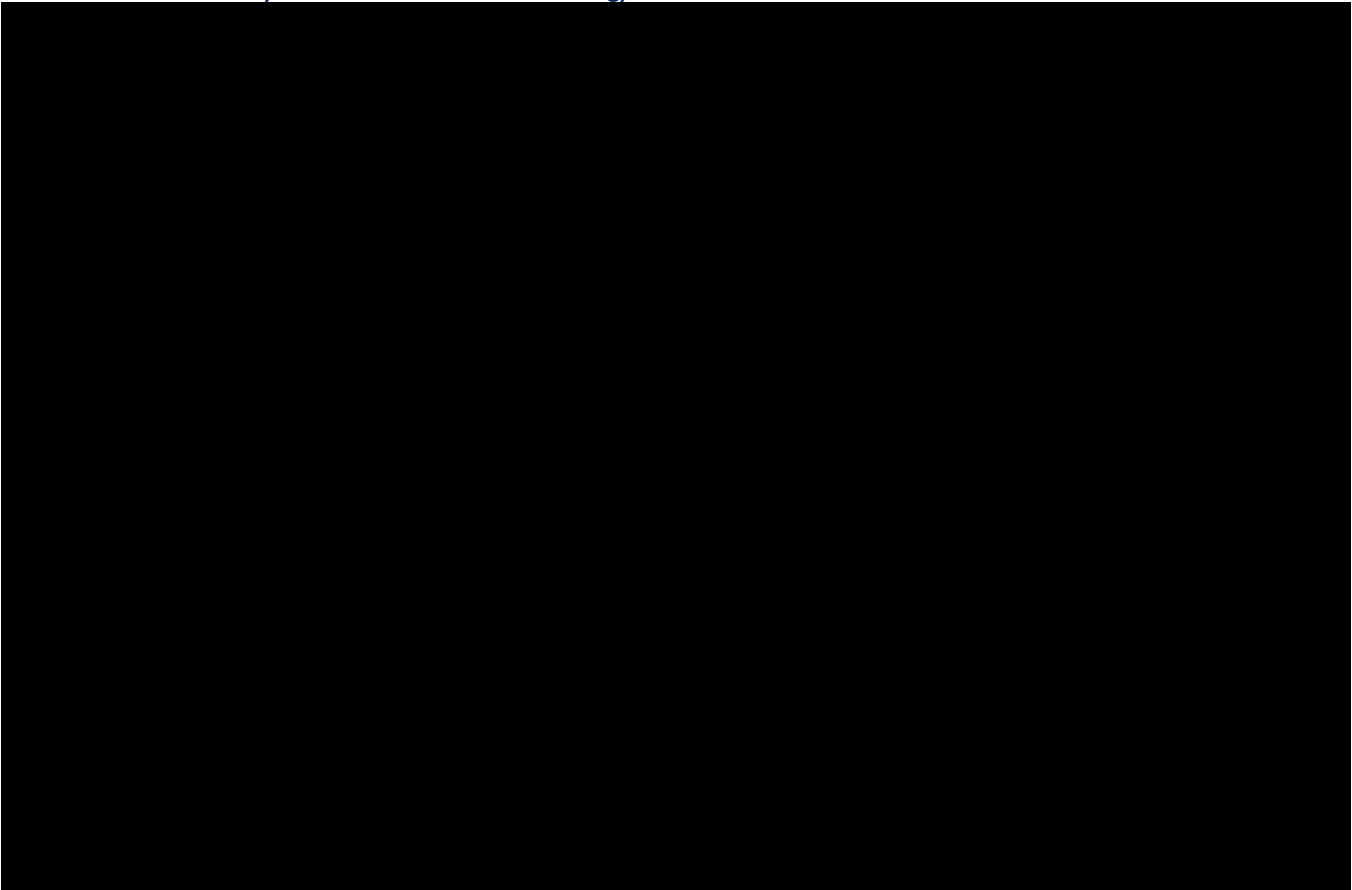
At Qa, we operate a 'buddy' system which offers clients the assurance that there will always be two members of staff who are fully up to speed with their research or evaluation project in the event of holidays or other absence. For contracts involving telephone survey work, we have arrangements in place with another research organisation to deliver telephone survey work should Qa experience high levels of staff illness/absence.


### 2.4 Previous Experience

Qa Research has a extensive experience delivering a range of evaluations for sectors such as charities, healthcare, local government services, and education including;

- evaluating the impact and outcomes of a programme or intervention;
- evaluating stakeholder engagement with a particular service or programme;
- evaluating the process of change to service or programme delivery; as well as
- using evaluation methods as part of projects with wider aims.

Qa has also undertaken a wide range of studies in the agriculture and horticulture sector, regularly gauging the views of livestock farmers and growers to inform the development of business support services, industry communications and strategy.





Much of Qa's agricultural experience has incorporated elements of evaluation such as satisfaction and stakeholder engagement and we have distilled large amounts of available data into meaningful suggestions for improvement. However, Qa has a wealth of experience undertaking formal evaluations across a number of other sectors. As such, the below examples showcase Qa's experience in applying evaluation methodologies to a range of sectors, as well as our extensive understanding of the agricultural and horticultural sector through varied project methodologies, including evaluation techniques.

The following project examples illustrate experience in addition to those found in document 1.2.3, *Strategy and Examples*.

### ***Evaluation of the Blood Pressure Wise Service (2019)*** ***Leeds City Council***

#### ***Topic of research/evaluation***

A qualitative evaluation to explore the implementation of the Blood Pressure Wise service in Leeds. Blood Pressure Wise was funded by the British Heart Foundation to support innovative community-based approaches to improve detection of high blood pressure across the UK. The service used an innovative yet challenging IT solution and a dual approach, targeting workplaces and community pharmacies.

#### ***Evaluation methods used***

The evaluation was commissioned in order to collect qualitative data on how the Blood Pressure Wise service has operated in practice from a number of stakeholder perspectives. An evaluation strategy mapped out key stakeholders and designed a flexible interviewing approach in order to gain maximum engagement.

In total 29 telephone and face to face interviews were completed as part of this evaluation with a range of stakeholders. This included community pharmacy staff; Leeds City Council staff; Blood Pressure Champions and a range of wider stakeholders which included staff from NHS Leeds CCG and the British Heart Foundation. A full report was produced and presented to council stakeholders.

#### ***Outcomes delivered***

The work provided Leeds City Council with key information on the challenges and insights gained through running the service, the impact the service has had so far and how the service is perceived. This evaluation fed into a wider local evaluation by HaCES and a national evaluation of the Blood Pressure Award Programme being conducted by Cordis Bright.

#### ***Demonstrates experience in the following areas of evaluation support:***

- Developing evaluation plans
- Data collection among programme leads & stakeholders
- Developing lessons learnt and recommendations for improvement
- Producing independent evaluation reports

## **Evaluation of the Polar Explorer Programme (2019)**

### **STEM Learning**

#### **Topic of research/evaluation**

A process and impact evaluation of STEM Learning's Polar Explorer Programme (PEP). The PEP encourages and supports teachers and schools seeking to raise pupil aspirations and attainment in science, technology, engineering and mathematics subjects (STEM). The programme is delivered in UK primary schools and provides a range of physical and online resources linked to the polar research vessel The RRS Sir David Attenborough.

#### **Evaluation methods used**

An evaluation plan was designed and agreed based on a number of existing performance indicators (or KPIs) articulated by the client. A theory of change was created and KPIs assigned. The client brief made it clear that a wealth of quantitative data existed from programme monitoring activity (which included baseline and follow-up metrics captured before, during and after the administration of the programme) but that primary quantitative data needed to be collected from teacher and ambassador stakeholders, as well as from the strategic partners involved in the development and delivery of the PEP. Qa designed a data collection and analysis plan based on these requirements.

The evaluation included understanding the effectiveness of delivery mechanisms within schools, explored the impact of the PEP on pupils, particularly in terms of engagement in STEM subjects and subsequent career aspiration, plus any changes in teacher confidence and skill in delivering STEM subjects in the classroom. The primary data collection also sought feedback on successes and weaknesses from strategic delivery partners.

The evaluation methodology comprised telephone depth interviews with teachers, Polar Ambassadors, programme partners and analysis of existing quantitative impact data collected throughout the programme by the client from teachers and on behalf of pupils.

#### **Outcomes delivered**

Qa identified a number of impacts of the programme, and mechanisms through which these successful impacts have been delivered. In addition, Qa made a number of recommendations for how similar programmes might be delivered in the future to increase their reach and impact.

#### **Demonstrates experience in the following areas of evaluation support:**

- Developing evaluation plans
- Data collection among programme leads & stakeholders
- Secondary analysis of existing programme data
- Developing lessons learnt and recommendations for improvement
- Producing independent evaluation reports



## ***Products & Services Study: Finding the ‘Crown Jewels’ (2020)***

### **AHDB**

#### ***Topic of research/evaluation***

Qa was commissioned to review all of AHDB's products and services with the overarching aim of uncovering what can be considered to be the organisation's 'crown jewels'.

When the study was commissioned AHDB had no theoretical metrics or principles that could act as a guide to establishing what a crown jewel product was, but hoped that by uncovering them in some way they could be used to showcase what AHDB's real unique selling points were, which ones should the organisation be shouting about to levy payers and stakeholders?

#### ***Evaluation methods used***

To evaluate each of the products and services and uncover the crown jewels we proposed to conduct three core stages of the study whereby each one would learn from its predecessor.

- **Stage 1: Data Analytics** Consisted of a data mining exercise of 5 years' worth of AHDB's levy payer satisfaction survey data. This equated to Qa analysing approximately 10,000 survey completion outcomes to establish levy payers' relationship with AHDB's products and services according to three key variables: awareness, usage and impact
- **Stage 2: Survey of Levy Payers** As not all products and services were assessed via the LPSS studies Qa then conducted a telephone survey with 310 levy payers to gain feedback on those where we had no data.
- **Stage 3: Qualitative Research with Levy Payers** We will be undertaking in-depth interviews with 30 levy payers in October and November 2020. Our overarching aim for the qual stage will be to uncover the best way for AHDB to achieve the best product and service offer to levy payers.

#### ***Outcomes delivered***

Our analysis helped to uncover the principles of what a crown jewel consisted of, which products and services have seem to already hold this status and which of them have the potential to be moved in to this category.

#### ***Demonstrates experience in the following areas of evaluation support:***

- Evaluation surveying
- Data collection among stakeholders
- Secondary analysis of existing data
- Developing lessons learnt and recommendations for improvement
- Producing independent evaluation reports
- Experience in agricultural sector

## **Evaluation of UK & Ireland Sourced and Grown Assured Scheme (2019)**

### **Woodland Trust**

#### **Topic of research/evaluation**

The Woodland Trust, in response to the increasing risk of pests and diseases in imported tree stock, developed the UK & Ireland Sourced and Grown scheme (UKISG). The scheme allows forest nurseries to display their stock, or a proportion of their stock, is assured to be sourced and grown in the UK and Ireland. Initially a procurement scheme for the Woodland Trust, they were interested in the scheme's scope in the wider nursery market as a procurement and bio-security assurance scheme.

#### **Evaluation methods used**

Qa undertook 20 in-depth qualitative telephone interviews with nurseries; 10 with forest nurseries currently on the scheme, and 10 with landscape nurseries that had potential to join. Nurseries were recruited from a list of current contacts shared by the Woodland Trust, and a database of nurseries built through Qa desk research. The interviews were conducted with a 'key decision maker' at the nursery.

Participants were guided through a discussion which covered the background to the nursery sector, their motivations and barriers for becoming UKISG assured, what might tip prospective nurseries over the edge into joining the scheme, as well as gauging opinions on how the scheme might be shaped going forward.

#### **Outcomes delivered**

The findings were presented to the Woodland Trust, and were well received, allowing strategy makers to pinpoint the decisions and issues that needed addressing, and illustrated the potential future of UKISG. It provided a balanced and informed assessment of current engagement with the scheme, highlighted areas for improvement, and suggested a number of ways forward for the Woodland Trust.

*"I knew we had a conundrum but I didn't know what it was, this research has clearly shown us what we need to think about and given us various ways forward"* - **Feedback from the client**

#### **Demonstrates experience in the following areas of evaluation support:**

- Data collection among stakeholders
- Developing lessons learnt and recommendations for improvement
- Producing independent evaluation reports
- Experience in horticultural / grower sector

## ***Evaluation of the Rural Development Program (2019)***

### ***DEFRA via ADAS***

#### ***Topic of research/evaluation***

The Rural Development Programme for England is a part-EU funded programme investing in environmental land management and improving productivity of the farming and food sectors. ADAS, in partnership with Qa, were commissioned to complete the first wave of the Rural Development Program in 2017 and the second wave in 2019.

The aim of the research project was to understand implementation issues, programme achievements to date and learn lessons for future delivery of support to farming, forestry and rural economies. The survey focused only on socio-economic schemes – Countryside Productivity, the Growth Programme and Leader - all are capital grant schemes for the farming, forestry and wider rural businesses.

#### ***Evaluation methods used***

We spoke to 407 farmers/businesses who had successfully applied for a grant through the scheme and 240 who were unsuccessful with their application to gain feedback from both perspectives. As the surveys were part of the on-going evaluation of the Rural Development Program, we re-contacted all the contacts we spoke to in 2017 who agreed to be re-contacted as well as those who applied to the program since the 2017 survey. Quotas were applied to beneficiary/non-beneficiary contacts, the 3 socio-economic schemes and there were further quotas on specific sub-sectors within each scheme.

All c. 650 15-minute surveys were completed across a two-week period in March 2019 and full data analysis and cross-tabs were completed in accordance with an analysis spec provided by RSK ADAS. The raw dataset and cross-tabs were provided to RSK ADAS for report-writing.

#### ***Demonstrates experience in the following areas of evaluation support:***

- Evaluation surveying
- Data collection among stakeholders
- Experience in agricultural sector

## **Evaluation of the Rural Growth Network (2015)**

### **DEFRA via SQW Consulting**

#### **Topic of research/evaluation**

“The concept of the Rural Growth Network (RGN) Programme emerged through the rural economy growth review and – in the context of sustained recession – a period of critical reflection on ‘What could be done to grow the economy in rural areas’”. DEFRA and other interested stakeholders identified a number of barriers and potential solutions.

One solution was that a network of ‘enterprise hubs’ ought to provide a basis for appropriate economic growth. However, from the outset, Defra was not prescriptive as to the definition of ‘enterprise hubs’, ‘networks’, ‘economic growth’ (beyond implying some combination of GVA and/or jobs), or ‘rural areas’ (other than in broad terms). Instead, it was looking for novel local solutions – and to learn from them.”

The Rural Growth Network (RGN) was piloted in the following five areas: Cumbria, Heart of the South West, North East, Swindon & Wiltshire and Coventry & Warwickshire. Each pilot area looked at different ways of supporting and generating business and employment in their rural economies. The aim of this CATI survey was to try and understand how successful each pilot had been and what learning had come out of each pilot, which could be shared with other rural economies.

#### **Evaluation methods used**

Qa, via SQW consulting, conducted 1000 CATI interviews with businesses that had benefited from the Rural Growth Network (RGN) piloted in the five areas. A further booster sample of 64 interviews was completed for Coventry & Warwickshire. Qa completed the 1064 interviews across six weeks. Quotas were applied to the pilot area and the type of business support offered.

#### **Outcomes delivered**

Qa were able to supply DEFRA with statistically robust data on the impact, successes and challenges coming out of the RGN, bespoke to each of the five pilot areas. This work, alongside SQW’s reporting of the data in the wider evaluation, enabled further informed development of the RGN.

#### **Demonstrates experience in the following areas of evaluation support:**

- Evaluation surveying
- Data collection among stakeholders
- Experience in agricultural sector

### 3 1.2.4 PROPOSAL, COST BREAKDOWN AND RISKS

- 3.1 *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%)*

**Example One: Example of a smaller piece of evaluation support work - extracts from the Pork KE Programme Evaluation specification (appendix 1)**

Evaluation objectives	Methodology/activities	Timeframe	No. of days	Day rate (£)	Total cost (£)
<b>Produce interim evaluation of the Pork KE Programme</b>	Inception meeting with AHDB	Jun-19	1		
	<b>Review of documents/data:</b> 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 year 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)	Jun-19	4		
	<b>Gather formative evaluation feedback from producers/stakeholders:</b> 10 in depth telephone interviews	June-July 2019	1.5		

	<b>Engagement with ADHB staff:</b> Attendance at two meetings	June-July 2019	2	
	<b>Review of cost benefit analysis</b>	June-July 2019	1	
	<b>Preparation of interim report:</b> Analysis of primary data Report writing	Aug-19  Aug-19	2  3 2	
<b>Produce final evaluation of Pork KE Programme</b>	<b>Review of documents/data:</b> 2nd and 3rd year (2019 and 2020) results from Farm Excellence Impact Survey and cost benefit analysis 2019-2021 technical events feedback form evaluation Precision Pig awareness, uptake and benefits/barriers repeat survey PigPro reports on uptake to date EUPIG end of programme reports	Apr-21	4	
	<b>Gather summative evaluation feedback from producers/stakeholders:</b> 10 in depth telephone interviews	May-21	1.5	
	<b>Engagement with ADHB staff:</b> Attendance at two meetings	May -21	2	
	<b>Review of cost benefit analysis</b>	May-21	1	
	<b>Preparation of final report:</b> Analysis of primary data Report writing	June-21	2 3	

			2		
<b>Total cost</b>					<b>£17,100 exc VAT</b>

#### **Further detail on method/approach**

Based on the information provided in Appendix One, we envisage that a combination of analysis of secondary data and collection of a small amount of primary data (in the form of qualitative depth interviews with stakeholders and meetings with AHDB staff) will generate the evidence required to perform an interim evaluation of the Pork KE Programme. We recommend a similar approach at the final stage with the analysis drawing on secondary and primary data from the programme in its entirety.

At the outset of the evaluation we would work with you to agree the project plan and a data management plan to ensure that GDPR regulations are adhered to. All primary data collection tools would be submitted to AHDB for approval prior to use.

## **Suggested report structure**

### **Interim report**

- Executive summary – max 3 pages - key findings and conclusions and recommendations
- Context – background to Pork KE Programme, programme outputs/outcomes
- Methodology – explanation of methods used and rationale
- Findings - progress towards outputs/outcomes, review of data, feedback from stakeholders and staff
- Conclusions – summarising comments based on evidence to date
- Recommendations – learning points at the interim stage to inform remainder of programme

### **Final report**

- Executive summary – max 3 pages - key findings and conclusions and recommendations inc. cost benefit assessment
- Context – background to Pork KE Programme, programme outputs/outcomes
- Findings - progress towards outputs/outcomes – review of data, feedback from stakeholders and staff, cost benefit analysis
- Conclusions – summarising comments based on evidence drawn from interim and final evaluations
- Recommendations – learning points to inform development of similar programmes/links to AHDB strategic objectives



**Example Two: Example of a medium sized piece of evaluation support work - extracts from the Farm Excellence Platform Impact Survey specification (appendix two)**

<b>Evaluation objectives</b>	<b>Methodology/activities</b>	<b>Timeframe</b>	<b>No. of days</b>	<b>Day rate (£)</b>	<b>Total cost</b>
<b>Farm Excellence Platform Impact Survey Year 1</b>	Inception meeting with AHDB	Aug 2018	0.5		
	<b>Survey design phase:</b> Phase to map survey content/consult with stakeholders in the 6 sectors.				
	Up to 12 depth telephone interviews (max 30 mins)	Sep-Oct 18	1		
	Survey design/piloting inc. cognitive testing	Oct 18	0.5		
	Sample development from AHDB database	Oct 18	0.5		
	<b>Year 1 baseline survey fieldwork</b>  CATI survey of 350 drawn from AHDB database (50 levy payers from each of the 6 sectors) plus 50 stakeholders (e.g. agronomists, vets, consultants and researchers)	Nov-Jan 18/19			
	<b>Data analysis and supply of data tables</b>	February 19	1		
	<b>Preparation of report and presentation delivery</b>	March 19	3		
<b>Farm Excellence Platform Impact</b>	Planning meeting with AHDB	Aug 2019	0.25		

Survey Year 2				
	<b>Survey design phase:</b>			
	Engagement with sectors	Sep-Oct 19	1	
	Survey design/piloting inc. cognitive testing	Oct 19	0.5	
	Sample development from AHDB database	Oct 19	0.5	

	<b>Year 2 survey fieldwork</b>	Nov-Jan 19/20			
	<b>Data analysis and supply of data tables</b>	February 20	1		
	<b>Preparation of report and presentation delivery</b>	March 20	3		
<b>Farm Excellence Platform Impact Survey Year 3</b>	Planning meeting with AHDB	Aug 2020	0.25		
	<b>Survey design phase:</b>				
	Engagement with sectors	Sep-Oct 20	1		
	Survey design/piloting inc. cognitive testing	Oct 20	0.5		
	Sample development from AHDB database	Oct 20	0.5		
	<b>Year 3 survey fieldwork</b>				
	CATI survey of 350 drawn from AHDB database (50 levy payers from each of the 6 sectors) plus 50 stakeholders (e.g. agronomists, vets, consultants and researchers)	Nov-Jan 20/21			
	CATI survey of 300 drawn from AHDB database				
	<b>Data analysis and supply of data tables</b>	February 21	1		
	<b>Preparation of report and presentation delivery</b>	March 21	3		
<b>Total cost</b>					<b>£43,264 exc VAT</b>

**Further detail on method/approach**

Based on the information provided in Appendix Two, we understand that the core evaluation requirement is for a baseline survey and two follow up annual surveys. At the outset of the evaluation we would work with you to agree the project plan and a data management plan to ensure that GDPR is adhered to. An overarching requirement of this work is to create a cohesive set of survey questions that enable comparisons between sectors participating in the Farm Excellence Platform including a core set of eight generic customer metrics and four sector specific. Given the need to overhaul the survey we suggest a thorough sector consultation and testing phase to ensure that the survey is fit for purpose. We propose to conduct qualitative depth interviews with two representatives within each sector, prior to the interview we would ask them to canvas views within relevant forums to ensure that relevant topics are covered within the survey. Based on the findings of this consultation phase we would then design the baseline survey for approval by AHDB. A cognitive testing/piloting phase would then take place to refine the questions. Using the England, Scotland, and Wales database of consented contacts supplied by AHDB we would construct a representative quota sample to reflect the profile of commercial growers and producers in England, Scotland and Wales, by size and farm enterprise type.

We propose to use a telephone methodology (CATI) for the survey. The survey would be designed in such a way to include routing/specific modules for each sector and depending on whether the respondent is a levy payer or stakeholder. We would look to achieve a total of 350 completions (300 levy payers/50 stakeholders).

We propose that fieldwork for subsequent years is preceded by a repeat consultation and testing phase to identify and refine further themed or sector specific questions, in addition to the baseline metrics. The same sampling approach and size will apply.

### **Suggested report structure**

- Executive summary – max 3 pages - key findings and conclusions and recommendations
- Context – background to the FEP
- Methodology – explanation of methods used and rationale
- Findings:
  - Year 1 – baseline findings analysed by sector and stakeholder grouping
  - Years 2 & 3 – findings and comparison with baseline metrics. Sector specific/themed analysis
- Conclusions – summarising comments based on evidence to date
- Recommendations – learning points to inform the development of the FEP

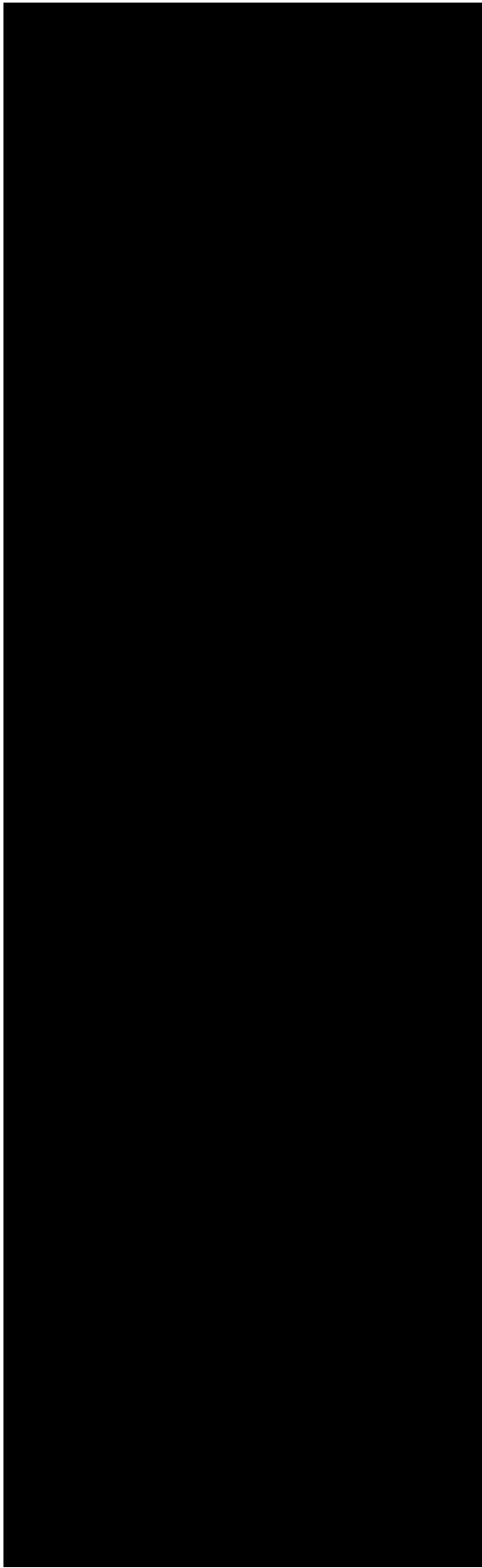
## Risk Matrix

The following matrix outlines the potential risks that could apply to both evaluation examples, and the steps we would take to mitigate these risks.

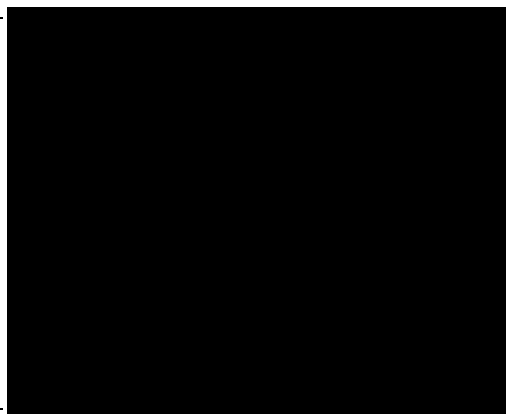
Risk	Likelihood	Impact	Mitigation
Timetables not met	Low	Medium	
Availability of Qa staff compromised due to COVID-19	Medium	High	
Qa unable to meet GDPR requirements for processing AHDB data	Low	High	

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Security of data transfer and storage is compromised	Low	High
Reporting outputs do not meet the expectations of the client	Low	Medium



Seasonal effects	Medium	Medium
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#### 4 1.2.5 QUALITY CONTROL, INFORMATION SECURITY, INTERNATIONAL STANDARD & MRS CODE OF CONDUCT COMPLIANCE

4.1 *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%)*

4.2

4.3 Business Continuity

At Qa, we operate a 'buddy' system which offers clients the assurance that there will always be two members of staff who are fully up to speed with their research or evaluation project in the event of holidays or other absence. For contracts involving telephone survey work, we have arrangements in place with another research organisation to deliver telephone survey work should Qa experience high levels of staff illness/absence.

Before national UK lockdown was announced by the UK Government, Qa Research took steps to implement remote working practices. These steps were facilitated by our significant investment in our ICT infrastructure and software systems during 2019. At that time, Qa invested in new laptop computers for all colleagues, a Voice Over Internet Protocol (VOIP) telephone system and improved remote access for colleagues to data held on our secure server (further details of which are below). This meant that a seamless transition to remote working could be realised in March this year.

A small number of Qa colleagues are now working in our COVID-secure offices in York, including colleagues who maintain ICT services and equipment, contact centre colleagues and our senior management team. These measures mean that we will be able to continue to work remotely as an organisation, and in the event of any one colleague falling ill to COVID-19, a significantly reduced likelihood that this will impact anyone else in the team. The result for you is the assurance that your projects will progress unhindered in the event of absence.

4.4 ISO 20252

All research undertaken by Qa Research is carried out in compliance with **ISO 20252** (to which Qa is registered), the international standard for organisations and professionals conducting market, opinion and social research. The Standard sets out requirements for:



- Research process management system;
- Managing the executive elements of research;
- Data collection;
- Data management and processing; and
- Reporting on research projects.

Qa's documented research process management system includes procedures and measures focussed on fulfilling quality control and quality assurance requirements.

ISO processes and procedures underpin all stages of our research processes and we have written Work Instructions that stipulate how each stage should be carried out, what forms should be completed and what records needs to be kept to ensure that projects are undertaken in a consistent, comparable and accountable way. These Work Instructions are developed to align with the ISO standard and are regularly internally and externally audited to ensure compliance.

4.5

#### 4.6 MRS Code of Conduct & Company Partner

All research and evaluation activity will be carried out in compliance with the Market Research Society's Code of Conduct, which all staff abide by. Data provided by respondents, as well as their identity, shall be treated in the strictest confidence and all assurances given to respondents shall be fulfilled. All reasonable precautions shall be taken to ensure that respondents are not harmed or adversely affected as a result of participating in the research.

As an MRS Company Partner, Qa Research is committed to upholding industry standards and we endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout our operation.

The MRS Company Partner Service delivers effective support to enable organisations such as Qa Research to develop our people and processes, and meet our commitment to research standards.

#### 4.7 Data protection and GDPR

All of our research and evaluation work is carried out in compliance with the current Data Protection legislation including the EU General Data Protection Regulation (2016/679) and the Data Protection Act 2018. Our data protection registration number is: Z8603006.

Our internally appointed Data Protection Officer (DPO) liaises with our Directors and ICT Manager and advises our researchers on the application of GDPR and DPA to the research they undertake for our clients. As an MRS company partner, Qa has access to the MRS Codeline service for any questions which may arise about the application of GDPR to research projects.

Our Privacy Policy can be found on our website [www.qaresearch.co.uk/privacy](http://www.qaresearch.co.uk/privacy), and is publicly available to clients and research participants alike. It outlines how we process and safeguard your data. Project-specific information, including the legal basis for the research (which will be discussed and agreed with you beforehand) is communicated to research participants in a privacy information notice in a format appropriate to the research methodology.

GDPR compliance is built into questionnaires, recruitment scripts and discussion guides, for example recording consent for the collection of personal data and explicit consent for the collection of special category personal data. We have processes in place to respond to requests from individuals to exercise their rights under GDPR, for example those making Subject Access Requests.

#### 4.8 Data Security

Data security is critical, and Qa has implemented a radical upgrade of our data security protocols to meet exacting standards for data security and have attained Cyber Essentials Assurance. This policy is supported by Cyber Essentials Assurance - Certificate Number: [REDACTED] and is available on request.

- File server is protected by an access control policy. Qa restricts and controls user access with system policies on the fileserver and network to prevent unauthorised or unlawful

processing of personal data and against accidental loss or destruction of, or damage to, personal data.

- All data stored on site is held on secure file servers covered by password protection and security policies, servers are held in locked air conditioned server room.
- All user accounts are protected by a password which matches the recommended password structure. If the user suspects that their password has been compromised they should report this to ICT and get the password reset.
- Paper documents and surveys are stored in a locked archive located on the premises.
- All data is backed up nightly online by [REDACTED], providing highly secure, [REDACTED] [REDACTED] as well as portable hard disk drives which are stored in our safe.
- Data access is restricted to authorised personnel.
- Removable media access is restricted, all transactions to removable media are logged.
- Transfer of data is controlled by the ICT team and all transfers are encrypted using [REDACTED]
- Passwords are never sent with the data or by the same transport method.

#### 4.9 Quality Assurance and Quality Control

We have specific Work Instructions that govern the recruitment of qualitative and quantitative respondents and which outline how to communicate with them, what information needs to be given to them to ensure compliance with Data Protection laws and to align with the MRS Code of Conduct, and how their details should be recorded and securely stored.

Any recruitment/interviewing completed by telephone is monitored in real time by the Contact Centre Manager who checks adherence to the instructions and feeds back directly to interviewers about their performance. We also digitally record all quantitative and qualitative calls (with the respondent's permission) so we can listen back to them not only for training and quality monitoring purposes but also for the later analysis of any qualitative information. For face-to-face interviewing we always 'back-check' a set proportion of respondents (5%-10%) by calling them back and asking some questions to verify their identity and participation.

Our approach to moderation of qualitative work is based on a cascading team system whereby the data resulting from the work of individual team members is analysed by at least 2 different qualitative moderators to provide a team based approach to analysis and interpretation and to share experiences, techniques and monitor the consistency of moderation. At least one of these moderators will be a senior qualitative researcher who will also provide ongoing training as required to other moderators. Generally, qualitative research analysis is carried out in a thematic way based on a number of analysis sessions involving all moderators working on the project; within each session key findings will be discussed, opinions shared and conclusions agreed. These will then be supported by close analysis of individual interviews/groups to provide supporting evidence.

All outputs (e.g. data tables, SPSS data, data coding, reports, presentations etc.) are checked in detail by a senior member of the Project Team before being signed-off and a record of sign-off and assessment is kept in the project folder. We are externally audited annually as part of ISO 20252 and these records are looked at as part of this assessment for completeness and any inconsistencies are raised and discussed with the project team. This process governs all coding of open questions and all data processing.

Generally, our approach to the reporting and presentation of findings is based on ensuring thorough, accurate and consistent reporting. We'd liaise closely with key AHDB stakeholders to design outputs

that align with their preferences and requirements (e.g. look & feel, complexity, focus of analysis, need for actionable recommendations or insights, etc.). We would aim to draw in understanding from other research we've completed for AHDB to cross-reference and map understanding in a holistic and overarching way, if this brings value to the project.

Specifically in relation to evaluation, we follow **Good Practice Guidelines** and principles outlined by the **UK Evaluation Society**. We ensure that we are transparent about our evaluation methods and that we uphold the principles of integrity and independence.

## 5 1.2.3 STRATEGY AND EXAMPLES

5.1 *Demonstrate a clear strategy for maximising evaluation effectiveness, giving at least two examples of where contracted evaluation work has improved programme performance. (10%)*

### 5.2 Strategy for maximising evaluation effectiveness

Please note that we have outlined in response to question 1.2.1 (approach, objective and delivery) the various steps that we would take in planning, undertaking and reporting on AHDB's various evaluations. That response covers the planning, procedural and methodological approaches that we might take in managing or supporting your evaluations.

We outline here the strategies that we would utilise in ensuring the effective delivery of all evaluations for AHDB.

#### **Identifying Clear Objectives**

We understand that the evaluations you are likely to commission will span multiple departments within AHDB and will include both process and impact evaluations; formative and summative.

Of critical importance in developing our evaluation plans will be to work with AHDB colleagues to understand their specific needs and expectations of the evaluation; what is the relative importance of evaluating processes and mechanisms relative to demonstrating impact? For which stakeholders is impact most relevant? Where will any resulting recommendations likely be actionable?

By working with you closely in the planning stages of the evaluation we can ensure that our work will deliver against your individual evaluation expectations.

#### **Matching Data Collection Approaches to Evaluation Objectives**

Once clear evaluation objectives have been agreed, Qa would work with you to establish performance indicators and develop a data collection strategy to support those objectives, whether they relate to process or impact evaluation.

This would include the development and roll out of quantitative and qualitative methods as required to fulfil the data requirements. In creating these data collection approaches, we will carefully consider potential existing data sources with you (for example from Management Information or other administrative data), and design tools to collect only the necessary primary data.

When devising any primary data collection approaches we will carefully consider the participants or stakeholders from whom information is required, and design data collection methodologies with their needs and preferences in mind. This will always involve careful consideration of the most appropriate mode of data collection, and will allow us to maximise both response rates and the quality of insights we can deliver to you.

### **Data Synthesis**

Paramount in the delivery of evaluation reporting is the successful synthesis of data from multiple sources and across modalities within the evaluation. Qa has a longstanding history of delivering mixed methods evaluations, including the analysis of existing data and the collection of both qualitative and quantitative primary data.

When reporting, we always seek to synthesise findings from these multiple sources and exercises in order to paint the most complete picture of a programme or intervention for our clients. This allows us to draw conclusions and make recommendations based on the most comprehensive body of evidence possible.

### **Reporting**

We will always discuss with you at the inception of any evaluation your needs and expectations for reporting.

We appreciate that some evaluations will require comprehensive in-depth reports with a high level of detail and reference to data. Equally, we understand that others will need to culminate in, for example, a succinct set of recommendations to be implemented in order to improve practice or maximise impact.

Whatever the format, we will ensure that our findings are clear and that we deliver actionable recommendations wherever possible. We can provide reports in the form of written documents, slide decks or even infographics, where appropriate, and always in line with your requirements and pre-agreed expectations.

### **Dissemination**

Our team is experienced in presenting our research and evaluation findings to a wide range of audiences. Ranging from one-to-one debrief meetings with project leads to presentations at conferences and conventions, in person or remotely, we are happy to disseminate and discuss our findings with you in the most appropriate way for each project, depending upon its scale, scope and intended audiences.

We will cost for any dissemination activity on a commission by commission basis in order to ensure that you get the most at the end of evaluation.

### 5.3 Examples of evaluation work improving programme performance

Qa's evaluation experience is varied and spans a range of sectors; see below for two notable project examples where we have undertaken programme evaluations which have provided the foundation for improved organisational or programme performance. Should we be successfully recruited to your evaluation support supplier framework, we will apply this methodological skillset and outcome-driven approach to agricultural sector evaluations.

#### **Process Evaluation of Programme Renewal (2020)**

##### **Girlguiding**

##### **Topic of evaluation**

The evaluation sought to understand the effectiveness of a newly-introduced Programme Management Office (PMO) into the organisation; a division introduced to oversee and support a number of large-scale change programmes the charity had planned. Specifically, Qa was commissioned to undertake an evaluation of the way in which Girlguiding designed, developed, tested and rolled out its renewed 'programme' – the structure, principles, activities and badges that make up the Girlguiding offer to girls and young women. This change programme was supported by the PMO.

##### **Evaluation methods used**

Based on the requirements for the evaluation, Qa proposed an evaluation plan that took into account the theory of change for this change programme, its established performance indicators and anticipated data collection methodologies. Where necessary, tools were designed for the collection of data in respect of these performance indicators.

A telephone depth interview approach was taken to this project, with Qa interviewing Girlguiding colleagues and Girlguiding unit leaders for Rainbows, Brownies, Guides and Rangers from all four nations of the UK. In total, 40 interviews were undertaken. Whilst the emphasis of the project was to evaluate the process, mechanisms and management of renewal, Qa was also able to deliver a number of insights into the impact of the revised programme so far (which had been in delivery for 3-4 months at the time of the fieldwork).

##### **Outcomes delivered**

As a result of the evaluation, Girlguiding have identified a number of highly successful elements of their delivery of programme renewal, including gaining an understanding of how the introduction of a PMO has assisted with this successful delivery. Equally, Qa were able to make a number of recommendations for changes to delivery in future change projects, and how improvements might be made within the PMO.

Whilst the emphasis of the project was to evaluate the process, mechanisms and management of programme renewal, Qa was also able to deliver a number of insights into the impact of the revised programme so far (which had been in delivery for 3-4 months at the time of the fieldwork) on Girlguiding unit leaders and the girls and young women experiencing the new programme. Beyond the scope and remit of the piece, Girlguiding are now able to talk confidently about the way in which their new programme is catering to the needs of girls and young women; improving their life skills, driving their ambitions, and helping them to reach their potential.

##### **How evaluation improved programme performance**

- Actionable insights were implemented to improve future change programmes
- Recommendations were taken up in order to improve future organisational performance



- Where successful process and factors were identified, Girlguiding were able to invest more in these areas to further improve impact on programme delivery
- Girlguiding have since adapted the way they deliver change programmes (and how the PMO supports such changes) for maximum effectiveness

*“Working with Qa Research on the evaluation of our programme renewal management and development was wonderful; there was a real sense of quality, care and consideration through the final report, and during the stakeholder management. The recommendations in the evaluation are tangible, honest and realistic. Qa were lovely to work with, proactive, friendly and flexible.”*

**Gemma Benton, Head of Girl Experience**

***Demonstrates experience in the following areas of evaluation support:***

- Developing evaluation plans
- Data collection among internal programme leads & external stakeholders (qualitative)
- Developing lessons learnt and recommendations for improvement
- Demonstrating early programme impact
- Producing independent evaluation reports

## **Mid-term evaluation: Building Better Opportunities projects in Lancashire (2018)**

### **Selnet**

#### **Topic of evaluation**

Qa Research completed a mid-term process evaluation of three Building Better Opportunities projects in Lancashire. Big Lottery Fund and the European Social Fund are investing in these Building Better Opportunities projects to work towards tackling the root causes of poverty, promote social inclusion and drive local jobs and growth. The three projects evaluated were:

- Age of Opportunity (supporting those aged 50+ who have low or no skills to help them move towards or into employment);
- Changing Futures (supporting those aged 15+ who are most at risk of exclusion from the labour market, focusing on particular groups such as BAME, women, those with physical and /or mental health problems);
- Invest in Youth (supporting NEET young people aged 15-24).
- Project beneficiaries tend to be those with multiple and complex needs that need support with practical matters and the development of soft skills before they are 'work ready'.

#### **Evaluation methods used**

Qa used a mixed-method approach to this evaluation. This involved desk research/reviewing existing monitoring information; online surveys with delivery partners and beneficiaries as well as depth interviews and focus groups with the breadth of stakeholders from beneficiaries; delivery partners and staff through to wider stakeholders including funding representatives.

The work very much focussed on establishing lessons learnt to date and exploring what could be improved within the remaining year of project delivery.

#### **Outcomes delivered**

To aid this the evaluation culminated with a deliberative workshop with key stakeholders involved in the three projects. The outcomes of the workshop informed the final evaluation recommendations

#### **How evaluation improved programme performance**

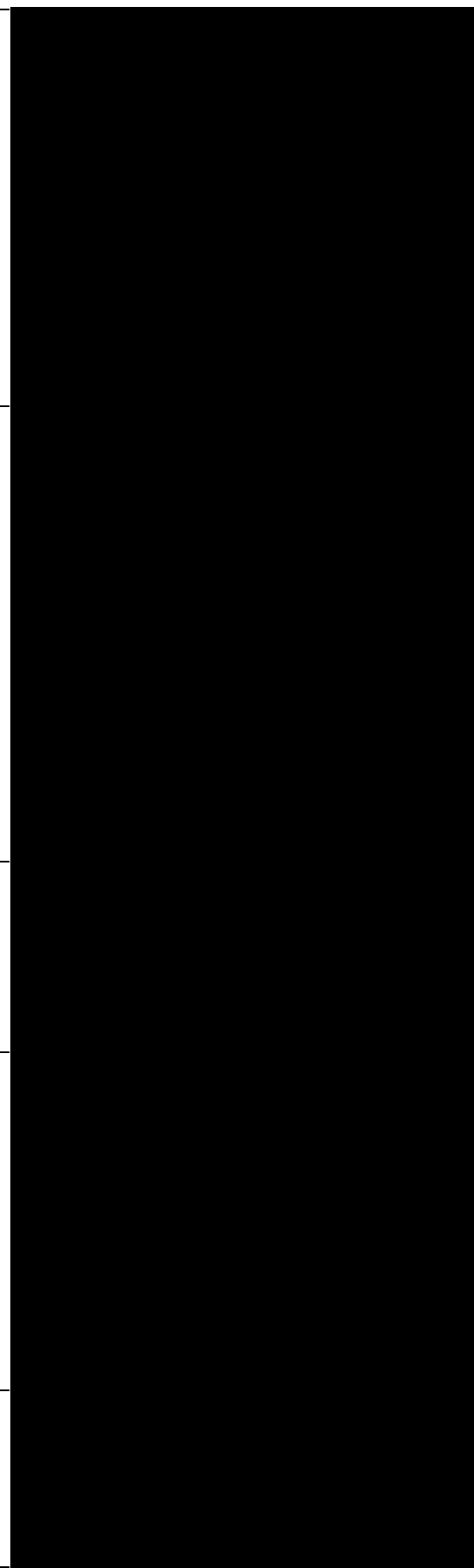
The evaluation highlighted issues relating to a specific job role within the Age of Opportunity element of the overall programme. Informed by the evaluation findings Selnet took the decision to reconfigure this role to improve efficiency and the experience of beneficiaries. This change helped to improve the performance of the programme.

#### **Demonstrates experience in the following areas of evaluation support:**

- Developing evaluation plans
- Data collection among programme leads & stakeholders
- Developing lessons learnt and recommendations for improvement
- Interim evaluation techniques
- Producing independent evaluation reports



Low levels of digital engagement by levy payers	High	Low
Dissatisfaction amongst disengaged levy payers	Medium	Low
AHDB 'ambassadors' provide positive feedback that introduces bias into findings	Medium	Low
AHDB offers multi-sector products and services	Medium	Low
Anxieties amongst levy payers over Brexit and a trade deal	Low	Low



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## **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.



AHDB Contract for Call off order form  
Buying Goods and S

**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.