**Terms of Reference**

**Roundtable and Interview Facilitator**

**Summary:**

We are looking for an external third party to assist with a series of interviews and a roundtable discussion with experts in economics, health, community and the environment, focussing on the advantages of home decarbonisation.

Background:

Building on a successful two-year partnership, WWF-UK and an energy company have been working together to promote carbon-free living in households across the UK. In 2022, the partnership released the *Better Homes, Cooler Planet* report, which showed how low carbon technologies can increase property value whilst reducing energy bills; the energy bill modelling was subsequently updated in spring 2023 to reflect more recent price cap data. Additionally, the two organisations jointly published a policy gap analysis in 2023, which looked at the extent to which existing policies meet the government’s 15% energy demand reduction target by 2030 (in the domestic sector only, rather than economy-wide), and identified policies which could be introduced to fill this gap.

To further build upon the success of this partnership, a series of interviews and a roundtable are being planned. The aim is to build upon work already completed by the partnership and create tangible links between the full range of benefits of home decarbonisation, with the aim of broadening support for home decarbonisation within political thinking.

Main Tasks:

* Assist with interview preparations, including tasks such as:
  + Minute and notetaking during interviews: Record key points, discussions and insights during interviews with relevant stakeholders (approximately 10 interviews in total).
  + Writing summaries of interviews: Summarise the content of the interviews, highlighting key findings and insights.
  + Summary pamphlet: Create a comprehensive summary pamphlet including insights and key facts, figures and/or quotes, main conclusions and themes from all interviews. Distribute the pamphlet to attendees before the roundtable to provide an overview and accurate representation of the discussion themes.
* Stakeholder engagement:
  + Engage with stakeholders to gather input and perspectives before, during, and after the roundtable.
* Roundtable assistance:
  + Assist with the roundtable between experts from a diverse range of industries including, but not limited to: health, housing, finance, environmental and community engagement, as well as academics, civil servants and political officials.
* Roundtable follow-up:
  + Summarise findings: Consolidate the outcomes and insights generated during the roundtable discussions.
  + Distribute findings: Prepare a comprehensive report summarising the roundtable findings and distribute it to relevant stakeholders.
  + Identify and document action items arising from the roundtable for further consideration and implementation by the partnership.
  + Assist with follow-up from the roundtable, summarising and distributing findings.
* Communication plan:
  + Develop a communication plan to help WWF-UK and the partner organisation disseminate the interview and roundtable outcomes.
* Post-event evaluation:
  + Conduct an evaluation and debrief of the events at the end of the roundtables; gather feedback and identify areas for future improvement.

Suggested Project Timeline:

* Project kick-off: 5th February
* Interviews: 12th February – 1st March
* Roundtable preparations: From the 26th February
* Pause: 25th March – 12th April
* Roundtable: w/c 29th April

Project Governance:

This project is being conducted as part of the partnership between WWF-UK and the energy company. The project will be jointly led by both parties. Weekly progress meetings will be held, alongside additional communications as required.

Response Instructions:

* Please provide evidence of having previously undertaken similar work that demonstrates the required skills and experience, as well as brief professional biographies of the team involved.
* Please include a project plan detailing proposed scope, methodology and timelines.
* Please include a cost estimate for the project to include the daily rate, the number of days/breakdown of cost by task/milestone. Please also include any applicable charity discounts you may offer. If VAT is applicable please clearly stipulate this within your costing proposal. If relevant, please list any anticipated travel expenses separately.
* Proposals should be no longer than four pages (names and CVs of staff working on the project are excluded from this).

Assessment of Proposals:

WWF-UK and the partner organisation will consider proposals and appoint the successful third party through a mix of qualitative and quantitative assessment, to include:

* Quality of the submission and adherence to the brief.
* Relevant organisational experience, expertise and skills of staff.
* Cost and overall resource inputs.
* Quality and effectiveness of the proposed methodology and ability to deliver the brief.

Proposal Submissions:

* Please submit your written proposal to [latkinson@wwf.org.uk](mailto:latkinson@wwf.org.uk)
* The deadline for submission is 24th January 2024

Consultant to be Appointed by: 2nd February 2024

Contract Particulars:

*Contracting with WWF-UK:*

*It is our requirement that an appointed external partner adopts our standards terms and conditions for engaging with us.  These are included within the tender documents.  Please confirm you are willing to accept these terms. Should you have any amends you need to make, these will need to be put in a word document and submitted for approval by the WWF-UK legal team.*

*WWF-UK asks all suppliers to comply with the Supplier Code of Conduct and WWF-UK Third Party Expenses Policy. Both documents are enclosed within the tender pack. Please confirm your acceptance of both.*

*All contracted suppliers are required to register on Panda Purchasing (WWF-UK’s PO and invoice system). Should you be successful in your bid, please confirm you will be willing to register on the system.*

WWF-UK Contacts:

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