



FRAMEWORK AGREEMENT FOR THE PROVISION OF GOODS AND/OR SERVICES

Agriculture and Horticulture Development Board

and

IFF Research Ltd

Ref: 2019-399

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

FORM OF AGREEMENT

THIS FRAMEWORK AGREEMENT IS MADE ON 20TH NOVEMBER, 2020

BETWEEN

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

AND

IFF 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 86);
 - Annex 4 (Call-Off Contract Template, page 88);
 - Annex 5 (AHDB Terms, page 89)

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

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

Signature:

Name of signatory:

Date:

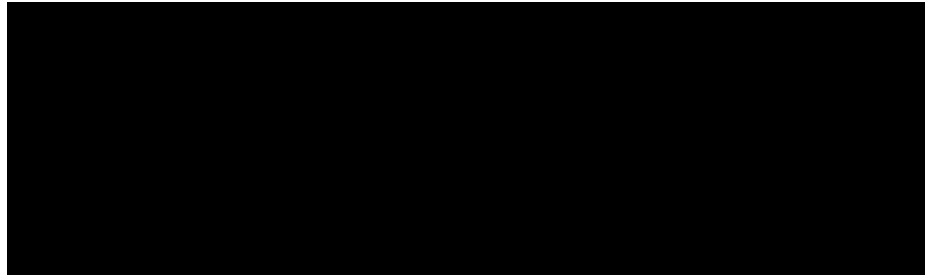


Signed for and on behalf of the Supplier:

Signature:

Name of signatory:

Date:



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:
Sara Maslowski
[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] (april.hughes@ahdb.org.uk) and (except for notices and matters required to be in Writing) by telephone (☎ [REDACTED] [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:
7 Brookdale Road, Bramhall, Stockport, Cheshire, SK7 2NW
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 85.
- 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:
 - name and full contact details of the project manager who would be leading any projects
 - relevant experience of project manager
 - role and name of key members of proposed staff to be involved in any projects
 - CVs for key members of staff to be involved with any projects
 - demonstrating how you will ensure continuation of service at the required level if any key members of staff leave your company
 - demonstrating, with reference to specific examples, a recent successful track record with similar contracts
 - a breakdown of hourly/day rates for each staff member

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

Structure of Submissions and Evaluation Methodology

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

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

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

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

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

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

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

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

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

Lot Two: Evaluation Validation

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

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

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

- General questions on the report or return on investment calculation
- Areas of critique
- How can the report/calculations be improved?
- Is evidence reliable?
- Are any assumptions outlined realistic?
- Do you agree that the report/calculations are reasonable? Why?

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

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

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

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

Budget

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

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

Proposal Requirements

1. Ability to deliver evaluation validation of internally produced AHDB reports and cost benefit analysis calculations (or similar), covering a variety of AHDB work functions, such as research, marketing, market intelligence and knowledge exchange, all relating to the agricultural industry.
2. The proposal should clearly demonstrate the supplier's capability for meeting requirements of AHDB against the evaluation validation lot. Suppliers should be able to demonstrate a track record of providing validation work in either evaluation in the agricultural industry, or agricultural economics.
3. The proposal should include the following details:
 - a. name and full contact details of validator
 - b. whether the validator is suited to evaluation validation and/or agricultural economics validation
 - c. relevant experience and knowledge of validator
 - d. a brief summary of suitability of the validator to meet the validation requirements
 - e. demonstrating, with reference to specific examples, a recent successful track record with similar contracts
4. Details and experience of any third party agencies that will be used to deliver any projects. Clearly indicating the stage in which they would be involved, and the expected extent of their involvement.
5. A process for quality control and consistency with validation work. Higher marks will be awarded where this information is presented in a way that demonstrates how quality control processes impact on/are implemented through validation work.
6. Availability for evaluation validation work throughout the year, with the bulk of work in the first quarter as described.

Structure of Submissions and Evaluation Methodology

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

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

Duration of contracts

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

Key personnel and account management

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

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

Terms/conditions of participation

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

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

Please respond via the Bravo portal

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

Submissions will remain unopened until after the closing date and time has passed.

Any clarifications are to be sent via the Bravo portal, the cut-off period for clarifications being 23rd October 2020.

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

Timetable

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

Examples are relevant to Lot One

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

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

Background/Aims

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

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

Required outputs

<i>Supplier:</i>	<p><i>The supplier should be able to demonstrate:</i></p> <ul style="list-style-type: none"> • <i>A track record in evaluation consultancy</i> • <i>Experience of working within the agricultural sector</i> • <i>An understanding of GDPR and its compliance</i>
<i>Interim report</i>	<ul style="list-style-type: none"> • <i>The interim report should review the progress made towards implementing the Investment Test business case and subsequent delivery in year 1 of the project plan.</i> • <i>Recommendations should be made on how to improve programme delivery, increase uptake and engagement with the pig industry and its stakeholders and maximise impact for the remainder of the plan</i>
<i>Resources for interim evaluation:</i>	<p><i>The following are available now:</i></p> <ul style="list-style-type: none"> • <i>AHDB strategy 2017-2020</i> • <i>Pork KE Investment test business case and feedback</i> • <i>1st year (2018) results from Farm Excellence Impact Survey and cost benefit analysis from year 1</i> • <i>2018/19 technical events feedback form evaluation</i> • <i>Precision Pig awareness, uptake and benefits/barriers baseline survey</i> • <i>PigPro reports on uptake to date</i> • <i>EUPIG phase 1 report (covering 18mths of delivery)</i>
<i>End of programme evaluation</i>	<ul style="list-style-type: none"> • <i>The summative impact evaluation should review delivery in years 2 and 3 (building on year 1) of the plan, review uptake and engagement with the pig industry / stakeholders and assess value for money, cost benefit and the end results</i> • <i>Recommendations should be made on future KE activity and ways to improve delivery</i>
<i>Resources for end evaluation:</i>	<p><i>The following will become available:</i></p> <ul style="list-style-type: none"> • <i>2nd and 3rd year (2019 and 2020) results from Farm Excellence Impact Survey and cost benefit analysis</i> • <i>2019-2021 technical events feedback form evaluation</i> • <i>Precision Pig awareness, uptake and benefits/barriers repeat survey</i> • <i>PigPro reports on uptake to date</i> • <i>EUPIG end of programme reports</i> <p><i>This isn't an exhaustive list and other evidence, case studies etc will be available</i></p>
<i>Industry and Stakeholders</i>	<ul style="list-style-type: none"> • <i>The successful supplier may wish to contact a small number of producers and stakeholders to gain direct feedback. This methodology should be outlined in the quote</i>
<i>AHDB Staff</i>	<ul style="list-style-type: none"> • <i>Face to face meetings can be undertaken, or attendance at team meetings to ask questions to help inform the evaluation can be made</i>
<i>Report Template</i>	<ul style="list-style-type: none"> • <i>Please provide a suggested template for the evaluation report</i>
<i>Project Plan</i>	<ul style="list-style-type: none"> • <i>Please provide a project plan, covering the production of the interim and end of programme report</i>
<i>Timings</i>	<ul style="list-style-type: none"> • <i>The interim report should be done in Jun-Aug 2019 and made available by end Aug 2019</i> • <i>The full end of programme evaluation should be carried in April/May 2021 and made available by end June 2021.</i> • <i>Invoicing should be after completion of each report</i>

Relevant to Lot One

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

Research objectives

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

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

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

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

3. Service Requirement

3.1 Research Objectives	<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> <i>i. Awareness of FEP</i>
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	<ul style="list-style-type: none"> ○ How did they find out about the FEP? ○ When did they find out? <p>ii. Involvement with FEP</p> <ul style="list-style-type: none"> ○ Why did they choose to get involved in the FEP? ○ What was their aim for attending? <p>iii. Uptake of FEP</p> <ul style="list-style-type: none"> ○ How many FEP events have they attended? ○ What has been their uptake of any resulting products/services? <p>iv. Learning</p> <ul style="list-style-type: none"> ○ What key messages have they taken from attending FEP events? ○ What skills have they improved following attendance at FEP events? <p>v. Change</p> <ul style="list-style-type: none"> ○ Have they made any changes following attendance at FEP events? ○ If yes, what and why? ○ If no, do they intend to make any change? ○ Or if no, why not? <p>vi. Benefits (economic, social, environmental)</p> <ul style="list-style-type: none"> ○ Perceived benefits of making change ○ Realised benefits of making change (economic quantification where possible and considering timescale of farming year) ○ Will they continue to realise benefits into the future? <p>vii. Satisfaction</p> <ul style="list-style-type: none"> ○ Did the FEP events / meetings achieve their objectives? ○ Changes they think could be made to the FEP <p>viii. Recommendation</p> <ul style="list-style-type: none"> ○ Would they recommend the FEP (scale 1 – 10)? ○ Net Promoter Score <p><u>AHDB will be very much guided by the research supplier in terms of setting the pre-determined baseline metrics.</u></p> <p>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.</p> <p>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.</p>
3.2 Approach Sampling	<p>to</p> <p>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.</p> <p>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.</p> <p>Prospective research providers should advise on the sampling approach with reference to the following considerations:</p> <p>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</p>

	<p>have varying levels of activity in the four key components illustrated in Appendix 1.</p> <p>ii. The FEP also consists of a variety of different programmes across the sectors - there are different products, services and campaigns used within each sector, examples of which are included at Appendix 2. (Hence, the requirement for a third of the questions to be sector specific). In creating and undertaking the survey, it is important to consider that these sector events and activities are more likely to be how levy payers recognise what they have participated in than the term FEP.</p> <p>iii. The FEP is increasingly linked to, or represented by, digital resources, tools & media which may be the main or only point of access for some levy payers and stakeholders.</p> <p>iv. A respondent may also have multiple enterprises qualifying for levy payment, but should be chosen on the basis of, and asked questions specifically relating to, the sector activity which they have engaged with the most. (One respondent = one enterprise).</p> <p>v. Sampling should be based on producers and growers that have actually attended FEP meetings & events. In addition, AHDB will ask the chosen supplier to also conduct a number of interviews with key stakeholders engaged with the FEP (to be advised once project is awarded).</p>
3.3 Database	<p>In order to carry out the research, the appointed supplier will be provided with a database of contacts covering England, Scotland and Wales (not NI). The database will be compiled from those who have engaged directly (attended an event or logged into a webinar) with the FEP (split into levy payers and stakeholders) and who have provided the necessary consent to be contacted for the purposes of this survey. Prospective suppliers are expected to demonstrate a thorough understanding of GDPR requirements and how they would comply with the regulations at every stage of the survey process.</p>
3.5 Quality Control	<p>The proposal should demonstrate a process for quality control and adherence to MRS code of conduct.</p> <p>Higher marks will be awarded where this information is presented in a way that demonstrates how quality control processes impact on/are implemented at each stage of the research project.</p>
3.6 Additional Information	<p>AHDB will provide the research supplier with details of the FEP programmes as well as examples of past questionnaires. Appendices one to three provide some initial information.</p> <p>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.</p>
3.8 Deliverables	<p>Questionnaire for Y1 baseline survey.</p>

CAPACITY AND CAPABILITIES

1.5 Introduction

Our partnership combines IFF Research and The Andersons Centre, enabling us to respond to the full range of evaluation requirements on AHDB's Evaluation Support Framework. IFF Research is one of the leading public sector evaluation specialists in the UK, regularly designing and undertaking evaluations for the likes of Food Standards Agency, Department for Education, MHCLG, Office for Students, Cabinet Office, BEIS and DWP. IFF works across a variety of sectors but is also familiar with AHDB having conducted the inaugural stakeholder survey in 2019. Joining IFF is The Andersons Centre, a specialist agricultural consultancy combining data analysts and agricultural economists.

1.6 Meeting the requirement

In this section we signpost our capacity and capabilities for undertaking the evaluations as described in the previous section


1. **Evaluation Design:** We have detailed our approach to planning and conducting evaluations earlier in this section, and the team selected for this framework bring extensive experience of planning evaluations (see Project Team). Of particular note is that our lead project manager for this framework, Kelsey Benninger, is a member of the UK Evaluation Society (<https://www.evaluation.org.uk/>). As a member of this society, Kelsey regularly attends seminars, workshops and conferences to support continuous professional development, gauge the latest trends in evaluation theory and discuss the practice of evaluations with other members of the society. Kelsey also leads IFF Research's internal, Market Research Society accredited training on evaluations (given to all 70 of our researchers). Furthermore, when we design evaluations this is led by senior members of the team (commonly the Director or Associate Director), ensuring quality in design.
2. **Questionnaire and sampling design:** Evaluations often require the collection of primary data, necessitating questionnaires/surveys design, and the creation of a sample structure. At IFF we have been responsible for the design of a range of questionnaires, over a number of platforms with a variety of audiences. We regularly undertake bespoke cognitive studies to aid questionnaire development, for the likes of OfS, HEFCE, DfE and FSA, further cementing our understanding of what questions work in what contexts. We are methodologically agnostic; therefore all our research staff are equally trained in and capable of designing both quantitative surveys and qualitative discussion guides for one-to-one depths or focus groups. The Andersons Centre will support questionnaire design where appropriate, bringing expert knowledge of the sector to help in focussing topics and ensuring appropriate language is utilised. Complementing our questionnaire design work, we regularly design sample structures, and indeed have done so for some of the most prominent business surveys in the UK, such as the Employer Skills Survey (c. 90,000 interviews for the DfE).

3. **Respondent recruitment:** Whenever primary data is collected a key requirement is the ability to reach, and encourage participation, among the core audience. Low response rates reduce the statistical reliability of the data and increase the changes of biases affecting research outcomes. IFF has a dedicated team of recruiters who have many years' experience recruiting stakeholders for qualitative interviewers. Meanwhile The Andersons Centre are widely known throughout the farming industry. This will prove invaluable where we seek to promote evaluation work, engage respondents, and maximise response rates. Their branding on written correspondence alone will increase the likelihood of respondents engaging with research. Furthermore – depending on the particular requirement of the evaluation – we will be able to leverage their extensive network of contacts in the sector to increase engagement in our evaluation work (where this is suitable to the requirement).
4. **Conducting surveys:** With a panel of 1,000+ interviewers IFF Research has one of the largest CATI centres in the UK. Operating a homeworker network set up we are able to quickly upscale resource as required by each project, and conduct a sizeable number of interviews in a short space of time. Our fieldwork capabilities were recently recognized in September 2020 when IFF was awarded the prestigious Best Operational Excellence accolade in the Market Research Society's (MRS) Operations Awards, demonstrating our ability to deliver high quality research in challenging times. We also have an internal Data Services team who script all our CATI surveys, as well as scripting online surveys to a bespoke template, and running data files and tables to specifications set by the research team.
5. **Conducting qualitative interviews:** All IFF's research team are trained to undertake and analyse both qualitative interviews and focus groups. In addition we have our own viewing facility, and boardroom in our London office, which can be used for focus groups or workshops as required. Furthermore if there is a requirement for a substantial qualitative interviewing exercise we can draw upon our specialist executive interviewers who provide additional interviewing support across our research studies. We can also confirm we have geographic reach across the UK for conducting face to face interviews.
6. **Secondary data analysis:** Both IFF and The Andersons Centre have the capacity to process, manipulate and analyse secondary data collected from other sources. Where the data relates to farming or economic measures this work will be undertaken by The Andersons Centre.
7. **Economic analysis:** The Andersons Centre team combines an unparalleled knowledge of the UK agriculture industry with economic expertise. Qualified agricultural economists, the team regularly undertakes agricultural market analysis, industry forecasting, and cost benefit analysis.
8. **Reporting and dissemination:** A key component of any research study is the ability to report findings in a concise and engaging manner, and raise awareness across the range of stakeholders. Both IFF Research and The Andersons Centre regularly write reports, and we ensure that all our outputs are prepared to a publishable standard. In advance of any report we shall agree a report 'blueprint' with AHDB, which formulates around a structure that meets the evaluation objectives and contains key findings. All reports are signed off by directors, who also lead on key chapters of the report. Furthermore The Andersons Centre can assist AHDB promoting any findings they wish to make public from the research, disseminating this to their network of contacts in the industry.

1.7 Working as a consortium

IFF Research regularly works with partners on an on-going basis. They are brought in on an as needed basis given the requirements of each project. Currently IFF Research is working with the following organisations:

9. The Institute of Employment Research, on a study led by IER on skill needs in the telecoms infrastructure sector, and an IFF-led study for the Institute for Apprenticeships and Technical Education, where an IER Honorary Professor has provided advice on the project design and reviewed the final report.
10. The Stats People, for statistical consultancy (particularly on sample design and weighting for a random probability sampling) for the UK Employer Skills Survey;
11. Manchester Metropolitan University and Salford University, for a 4-year longitudinal social workers study for DfE. IFF are leading the study. The universities are providing on-going advice on survey design and analysis, and leading on the qualitative aspects of the project.
12. University of East London, on a project for Sport England evaluating local interventions - Local Delivery Pilots. They are providing consultancy input on the impact assessment and counterfactual element of the study as well as assessing the sustainability and scalability of interventions.
13. Bryson Purdon, on the Evaluation of Integrated Areas Programme for the Ministry of Housing, Communities & Local Government (MHCLG). They are providing consultancy input on the impact assessment and counterfactual element of the study.
14. Learning and Work Institute, on a 2-year study Evaluating the Apprenticeship Programme in Wales for Welsh Government. IFF are leading the study. LWI are undertaking a cost benefit analysis.
15. In this framework IFF is partnering with The Andersons Centre, who provide both expert insight into the agricultural sector, and related skills in undertaking economic analysis.
16. IFF will be the overall lead for the contract in the sense of managing the overall relationship with AHDB. For each piece of work that comes through the framework, Kelsey Benninger as contract manager will review the requirement and determine what role each member of the consortium will play. IFF will then work with The Andersons Centre as necessary to design an approach that meets the requirement, and transparently outline roles and responsibilities across the consortium.
17. A formal proposal will be written for each piece of work, detailing the planned approach, timetable, risks, team and roles. This will be updated (or confirmed) following the inception meeting, shared with AHDB, and further updated during the project if responsibilities, roles, or other aspects change.
18. There may be projects handled singly by just one consortium member (if for example we are solely required to undertake a cost-benefit analysis of existing data, this will be suited to The Andersons Centre). In this case, the other consortium member would simply be emailed with the findings, to keep them in the loop. As shown by the table below, the consortium will share out aspects of the evaluation work accordingly.

Aspect	IFF Research	The Andersons Centre
Overall framework management		

Initial review of evaluation briefs	✓	
Proposal Design	✓	✓
Questionnaire and sampling	✓	✓
Recruitment / promotion	✓	✓
Survey fieldwork	✓	
Depth interviews	✓	
Economic analysis		✓
Reporting and dissemination	✓	✓

We also envisage a brief review after each project between consortium members, and with the AHDB, discussing how things went, and things that could have gone better, to ensure continual improvement.

There may be occasions where sub-contractors are required to support our approach. Where sub-contractors are employed, there will be rigorous processes for ensuring the quality of their work, including thoroughly checking all outputs and maintaining regular lines of communication throughout the period of work, to check things are on track, no unforeseen problems have arisen, and to discuss emerging findings (both theirs and any from the tasks the core consortium is conducting). The frequency with which such communication would be required is likely to vary depending on their tasks, but we would typically expect weekly emails on progress and fortnightly diarised telephone calls.

More generally, in all cases where a new sub-contractor or partner is proposed, we will obtain information on:

1. Their quality standards
2. Their membership of relevant professional bodies
3. 2-3 references, which will be followed up by the consortium lead
4. Examples of their recent work and / or of work of the lead at their organisation.

Then for each specific project, we will obtain written information from them, before the work starts, of:

5. Any specific standards or processes that will be employed for this specific piece of work
6. The methodology they will employ
7. The staff team and the main contact lead, and the number of days assigned
8. Confirmation that they can complete the work within the timetable, and agreement of dates of delivery for key tasks
9. Frequency of contact / updates during their work
10. Risks and mitigations.

1.8 Introducing the partnership

Our partnership comprises **IFF Research**, a full-service research agency that has become one of the largest independent research companies in the UK specializing in evaluation theory, and **The Andersons Centre**, who provide comprehensive agricultural context and knowledge.

- **IFF Research are experts in evaluation and public sector research, including clients such as AHDB and the Food Standards Agency, with a host of in-house facilities.** Since being founded by Lord McIntosh of Haringey in 1965, IFF has become a trusted partner of numerous public and private sector organisations. As an ad-hoc agency our operation is particularly well designed to support framework-based contracts, fully equipped to respond to incoming briefs and project requirements quickly and efficiently. Additionally, we have the vast majority of necessary skills and resources contained in-house, all of which are relevant to various evaluation needs and requirements; we employ over 100 people in our research team alone and offer a full portfolio of research services, including a CATI telephone centre and remote telephone interviewing network, specialist qualitative and quantitative fieldwork teams, a dedicated data services and coding team and our own in-house focus group facility. This has supported us in the successful delivery of over thirty evaluations over the last three years.
- **The Andersons Centre: sector specialists who provide economic and business advice, research and analysis to the agricultural, rural and food sectors across the UK, Ireland and beyond.** The Andersons Centre traces its origins back to 1973 when Andersons the Farm Business Consultants started providing business advice to British farmers. Today, our consultants support around 2,000 farmers across the UK, advising on a range of issues including managing costs, financial planning, joint ventures and succession planning to maximise profitability and performance. In addition to our strong presence in the farm business consultancy market, we have expanded to offer services to businesses and organisations throughout the food and farming industry both domestically and internationally. We have also undertaken evaluation work directly on behalf of AHDB and HGCA. In 2014, we produced an excel-based Cost Benefit Analysis tool, for example, designed to be used to test the performance of all projects undertaken by the HGCA.

1.9 We provide an overview of the team structure, experience and roles and responsibilities below, with full CVs contained subsequently.

1.10 Team and experience

For this framework we have pooled together a large group of individuals from whom we will select specific project teams depending on any particular tender requirement within the framework. Overseeing all our contracts will be **Kelsey Beninger, IFF Associate Director and Contract Manager** for this framework. She will be on all project teams to **ensure consistency and embed learnings and knowledge**. Of particular note is that she will oversee a post project review within the appointed project team, and disseminate learnings across the consortium, to ensure we continue to knowledge build across the whole team. Within projects, day-to-day management responsibilities will typically fall to one of IFF's Research Managers or a consultant at The Andersons Centre.

IFF will act as the lead contractor for the vast majority of projects, save any that solely require economic analysis. In this scenario, the economic expertise of The Andersons Centre will see them lead.

1.13 Mitigating staff turnover

The partners are proud of our ability to attract and (critically) to retain high quality researchers. It is vital to plan for unexpected absences and for staff turnover however and have a number of procedures and measures in place to meet this end:

- **Large team:** The size of our 'core' team will ensure continuity. As noted, we have ample representation at the Director/Partner level (four colleagues in total) and at the Research Manager / consultant level (five colleagues in total). Should any need to step away from a given project (either unexpectedly or due to annual leave) others will be able to step in and pick things up with ease.
- **Knowledge sharing:** All members of the team will be kept up to date on project progress and specifics, regardless of whether they are appointed as the lead project manager or even part of the core project team. Consequently, the impact of anyone leaving would be very short term.
- **Workload planning/ resourcing processes:** a considered and detailed forecast of resourcing requirements is essential. Each partner has specific mechanisms for ensuring the management of workload, built in to standard business operations. For example, at IFF all members of the research team are required to log their projects and assignments for the upcoming months and to update this on a weekly basis. This log also includes planned holidays or absences. Using this, we can spot any potential issues well in advance, leaving plenty of time to devise an appropriate strategy.

APPENDIX 1 - PORK KNOWLEDGE EXCHANGE PROGRAMME EVALUATION (JUNE 2019-JUNE 2021)

1.15 Pork Knowledge Exchange Programme (Pork KE)

Knowledge Exchange is a key mechanism for accelerating innovation and productivity growth to achieve AHDB's purpose of inspiring its farmers, growers and industry to success in a rapidly changing world.

The Knowledge Exchange Pork Programme (Pork KE) operates in England only, using the pork levy to address some challenges facing the pork industry, like the impact of Brexit on trade. Funding for Pork KE increased from 31% to 33% between 2016 and 2019, showing AHDB's commitment to invest in supporting the pork industry.¹ Eight AHDB staff² coordinate pork knowledge exchange, both identifying the key skills required and signposting solutions to the pork industry. The Pork KE team help producers find the support their businesses need in a range of ways:

11. Help pig producers find tried-and-tested best practice from fellow producers across Europe by supporting the coordination of **EUPig** and sharing all new knowledge in one place;
12. Deliver information to and collect feedback from levy payers, both physically and digitally, through the **Farm Excellence Network**, a vast operation, with almost 100 host farms and over 200 discussion groups;
13. Provide locally representative case studies for pork businesses to follow in real time by attracting host farms and demonstration sites to deliver **Strategic Farms**. This engaged from 20-100 people and involves 3-6 meetings per year;
14. Coordinate **Pork Field Trials**;
15. Support levy payers to understand the detailed workings of farm business by hosting **detailed technical discussions** in smaller groups like a breakfast meeting or through larger conferences, about business and technical topics and benchmarking; and

¹ https://projectblue.blob.core.windows.net/media/Default/About%20AHDB/Corporate%20strategies/CorporateStrategy_updateJune2017.pdf

² <https://ahdb.org.uk/meet-the-team#h1>

16. Coordinate smaller groups of 5-15 people to meet through **pig clubs or groups**, anywhere from monthly to once a year.

1.16 Evaluation objectives

Evaluation is crucial for AHDB to understand what works, why and in what way to deliver effective programmes. It is also essential for demonstrating good value for money to levy payers, without which the levy-payer-facing activities in the Pork KE programme would not be possible.

To understand how Pork KE was implemented and is working in its first year (2018/19), and the reasons it has or has not worked, you need an **interim formative evaluation**.

To decide to sustain or scale up the programme you need to understand the impacts of Pork KE – positive and negative, intended and unintended, direct and indirect; you need a **summative impact evaluation** after the three years of the programme (June 2021).

IFF are well placed to deliver this evaluation. We are a known specialist in evaluation, with a live portfolio of c. 15 evaluations at any given moment, including evaluation scoping and feasibility studies. Our current portfolio includes multiple major evaluations for Department for Education, Department for Work and Pensions, the Construction Training Industry Board, the Health Education England, the Ministry of Housing, Communities and Local Government, and the Money and Pensions Service.

Evaluation considerations

To design an evaluation that meets your needs we reflected on your objectives and our methodological expertise. In doing so we identified key considerations that informed our proposed design, summarised below.

1. **Breadth vs. depth** – The programme involves lots of components of varying audiences and scale, and in different stages of development. Budget will not allow for us to go in depth with all activities (nor do we need to, to produce a robust evaluation).

To strike the right balance and answer your objectives, we recommend a mixed-method approach to leverage the strengths of both quantitative and qualitative evidence. We recommend secondary analysis of existing surveys and synthesis of strategic and operational reports coupled with targeted discussions with AHDB staff and pork industry stakeholders.

2. **Leveraging existing evidence** – AHDB has measured the performance of Pork KE through four surveys.³ Our proposed approach builds on accessing and analysing this insight. We assume the surveys capture core measures needed and have a sufficient sample size to do aggregate analysis, and possibly some sub-group analysis by activity type and/or audience type. At the start of the evaluation we will review the available data against the evaluation objectives and confirm how we will analyse it and what insight it will provide, working with AHDB to revise the evaluation approach if required

³ *Pork KE Investment test business case and feedback, 1st year (2018) results from Farm Excellence Impact Survey and cost benefit analysis, 2018/19 technical events feedback form evaluation and Precision Pig awareness, uptake and benefits/barriers baseline survey*

(see more details later in this proposal). From the information provided in the brief, it is unclear if data is available for each activity within Pork KE (e.g. strategic farms and field trials), so during this mapping exercise we will flag what gaps exist and what the options are for either expanding or reducing the scope of the evaluation.

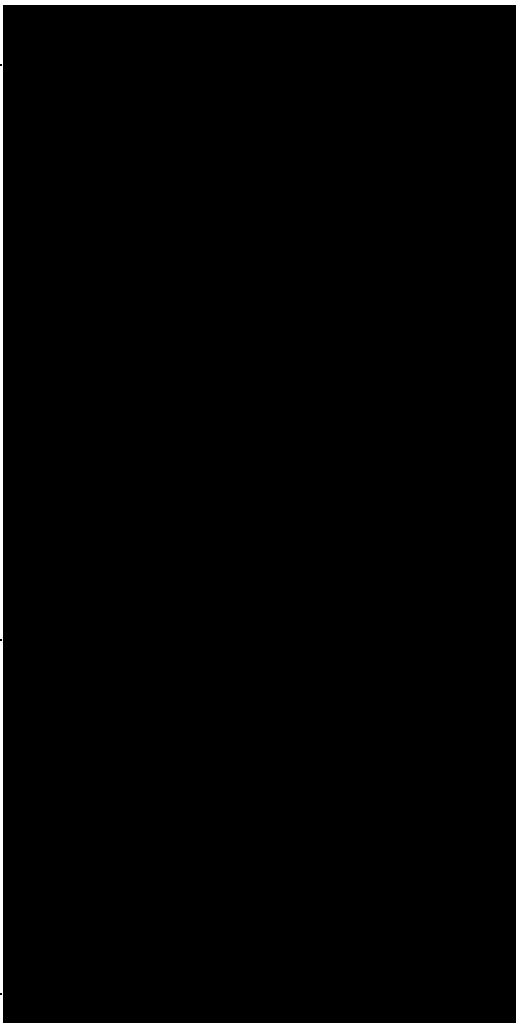
3. **Robust within budget** – The volume of activities over multiple years means evaluation could be quite resource intensive just to collect and analyse data. Our proposed approach has accepted some necessary trade-offs but we feel it will provide a level of robustness we believe is needed to meet your objectives within budget.

1.17 Evaluation approach

The table below explains how our proposed approach meets your research objectives and key research questions. We feel this approach offers the best value for your requirements.

N°	Evaluation objectives	Research questions	Proposed approach
1	Provide formative feedback on the implementation of the programme in its first year (interim formative evaluation)	<ol style="list-style-type: none"> a. What progress has been made towards implementing the Investment Test business case? b. What changes have been made to the programme compared to the business case, and the reasons for this? c. How is the pig industry and key stakeholders engaged in the programme, including barriers to engagement and opportunities to improve engagement? d. What is uptake to the programme, including barriers to uptake and opportunities to improve uptake? 	
2	Provide summative feedback on the success of the programme	<ol style="list-style-type: none"> e. What progress has been made since year 1 (in years 2 and 3), including pig industry and key 	

	(summative impact evaluation)	<p>stakeholder engagement and uptake to the programme?</p> <p>f. What effect has programme participation had on the pig industry and key stakeholders?</p> <p>g. What is the value for money of Farm Excellence?⁴</p>
3	<p>Provide proportionate and relevant recommendations on future KE activities and ways to improve delivery</p>	<p>h. What strategic, operational and contextual factors have facilitated or hindered:</p> <ul style="list-style-type: none"> - The implementation of the programme - The impact of the programme <p>i. What are the lessons learned for improving delivery of the programme?</p>



The remainder of the proposal discusses our approach in more detail.

1.18 Scoping

⁴ Cost benefit analysis (CBA) appears to only be available for Farm Excellence, and the evaluation budget does not stretch to cover CBA for all Pork KE activities

In our experience of successful evaluations, a robust scoping stage including an inception meeting is critical as the foundation for finalising clear objectives and approaches, understanding stakeholders and building effective relationships, and establishing clear and regular points of feedback. During the inception we will work closely with AHDB to establish a clear set of requirements and documents to steer the evaluation. We will attend a virtual **evaluation inception meeting** at Year 1 to discuss and agree practicalities of delivering the evaluation effectively and efficiently, to map the key stakeholders and audiences for this evaluation, and for the research team to gain a deep understanding of the programme to design a fit for purpose evaluation and deliver actionable insights. The meeting would be held via Teams or Zoom, as you prefer, typically lasting an hour for a project of this type. We will also establish clear expectations and templates for project management and formative feedback.

We would agree an agenda with you in advance, but would expect to use this meeting to introduce you to our team, obtain a full briefing on the study background and an update on Pork KE progress, including any KPIs, review the project approach and timings (including Q&A and working through any concerns), and agree our joint ways of working and project management processes. This will also include discussing any key decisions that need early discussion (such as identifying documents and stakeholders for the next phase, format and focus of the deliverables, and process for transferring the survey data).

After this meeting, we will provide confirmation of everything agreed, any changes to the evaluation plan, and provide an updated project timetable, as well as schedule regular project catch-up calls.

We also suggest having an inception meeting at Year 3, to restart the evaluation, catch up on key programme developments and agree our intended approach still remains appropriate.

1.19 Strategic document review

Following the inception meeting, we will begin a short phase of work to better understand the programme, its activities, and its intended impacts from different perspectives. This is both for our purpose, to ensure we have a solid grounding in the programme, and to begin synthesising evidence to answer the interim formative evaluation questions. We will review strategic and delivery programme documentation. It is unclear from the brief the length and format of some of these documents, so for the purposes of costs we have allocated two days of time to collect, review and analyse documents for this purpose, or about three long documents. Relevant documents are likely to include the AHDB strategy 2017-2020, the PigPro report on uptake to date and the EUPIG phase 1 report.

To help understand the impact of the programme, we will review a further selection of documents at year 3. As above, we have allocated two days of time to collect, review and analyse documents for this purpose, or about three long documents. Documents are likely to include the PigPro report on uptake to date, the EUPIG end of programme report and another document key for understanding the impact of the programme's components.

Key information from these documents will be added to a bespoke framework, organised around the information needed to answer evaluation objectives.

In an ideal world, our evaluation would include a detailed programme logic model to ensure the evaluation measures the right things, in the right way. There is insufficient budget to develop a logic model here however. Evaluation design will need to be fluid and we may need to change the suggested approach once we understand more about what data is available. Any changes will be discussed with you and reflected in a revised evaluation framework.

1.20 Evidence review and secondary analysis of surveys

Our partner, The Andersons Centre team, combines an unparalleled knowledge of the UK agriculture industry with economic expertise. Qualified agricultural economists, the team regularly undertakes agricultural market analysis, industry forecasting, and cost benefit analysis. They will consult on this stage of the project, reviewing the cost benefit analysis for Farm Excellence to assess its appropriateness for the evaluation, and explore opportunities for other value for money measurement. We have allowed [REDACTED] days of their time for this work.

Data management and analysis

Our exact data management and analysis approach will depend on the availability, type and format of evidence (this will be defined during the inception meeting). It is worth highlighting that due to GDPR conditions, AHDB must have consent from levy payers to share their information with a third party, if it is to be shared at a disaggregated, identifiable level. The remaining evidence sources will either be publicly available or anonymised and belong to AHDB so its Chief Executive can agree to share with a third party.

For now, we assume survey data (sample, responses) will be provided in Excel and we would then use the statistical software package SPSS to conduct descriptive analysis, and where possible, sub-group analysis, for year 1 and years 2 and 3, then comparing year 1 with year 3.

1.21 AHDB staff and pork industry stakeholder interviews

Qualitative research with relevant AHDB staff and board members, and pork industry stakeholders, like producers and farmers participating in Pork KE activities is a good way to capture depth of insight on implementation, delivery and impact. Below we outline our initial thinking of our approach, including breakdown of interviews by audience and Year 1 and Year 3. We would discuss this plan in the inception meetings and may find a different composition is more effective, based on the availability and role of different people.

AHDB staff discussions

To understand what progress has been made towards implementing the Investment Test business case and what changes have been made to the programme compared to the business case, AHDB staff discussions are recommended. We propose the following composition of stakeholder interviews and interview focus for each wave of interviews (see table below). In discussion with you, we will develop a topic guide to structure these interviews. Given not all individuals will have something to say about all topics of interest, we recommend topic guides that includes core questioning for use with all participants, and targeted questioning for use with a subgroup of participants. This also helps to strike a balance; delivering depth of insight without overburdening participants with long discussions.

Audience and approach	Interview focus	
	<i>Time 1 (interim)</i>	<i>Time 2 (end of evaluation)</i>

AHDB Board and Pork Sector Chair or a Pork Board member** 1 teledepth, up to 30 minutes **Some members are producers and could also be asked about the discussion points for the stakeholders interview at Year 3, below	<ul style="list-style-type: none"> • Importance of Pork KE for AHDB and the sector • Expectations for Pork KE in Year 1, 2 and 3 • Opportunities and challenges of establishing and delivering Pork KE
AHDB's Head of Knowledge Exchange – Pork 1 teledepth, up to 45 minutes	<ul style="list-style-type: none"> • Rationale for business test case, and expectations of what Pork KE would achieve • Pork KE's key components, and how these are managed and organised • Changes made to programme design and delivery since business case, and the reasons for this • Approaches to engaging with pig industry and key stakeholders, early successes and challenges • Programme uptake to date and expectations going forward
AHDB's Knowledge Exchange Managers 1 mini group, up to 60 minutes	

Pork industry depth interviews

To better understand how pork industry stakeholders are engaging with the programme, the factors influencing take-up and the effect the programme has on them, we recommend interviews with pork industry representatives engaging with the programme. Given evaluation parameters, we think resource is best allocated to conduct these at the end of the evaluation, allowing sufficient time for impacts to emerge among individuals, while also allowing us to support

individuals to ‘look back’ on all Pork KE activities involved in, to understand what worked well and less well. We propose the following composition of interviews and interview focus (see table below).

Audience and approach	Interview focus	
	<i>Time 1 (interim)</i>	<i>Time 2 (end of evaluation)</i>
Pork industry stakeholders delivering KE activities with AHDB e.g. a host farm, speaker at a discussion or group 3 teledepths, c. 30 minutes	NA	
Levy payers directly supported by KE activities e.g. visited a host farm, attended a discussion/group 5 teledepths, c. 30 minutes	NA	

Our in-house team of specialist qualitative interviewers would engage stakeholders, arranging an appointment time most appropriate for them. We do not think an incentive for participation is necessary, given the relatively small ask on people’s time, and the numbers we are seeking to engage. We would explore with AHDB at the inception meeting how best to identify individuals willing to take part. It may be survey respondents have consented to be recontacted for further research, or possibly we could advertise the opportunity through one of AHDB’s communication channels to relevant individuals.

Qualitative analysis

All interviews will be recorded with consent, and interviews written up thematically by the researcher using a consistent template. Our qualitative analytical approach is structured by the research questions but builds upwards from the views of participants. To uncover key insights, we propose an analytical

approach firstly comprising a process-driven element using our framework analysis technique. We will also conduct Director-led analysis sessions involving the full team, to consider the implications of the underlying factors that influence programme delivery and outcomes, and to reflect on opportunities for AHDB to affect change.

1.22 Communicating your insights

This evaluation is pivotal to understanding how the Pork KE programme has been implemented and the impact it has had on the users of its activities and resources. Any deliverables need to do more than tell you facts. To support your strategic and operational work we will provide engaging and accessible findings reports (interim and final), integrating all findings and their implications on your work. To ensure we've got the structure and flow of the reports right, we will agree a report structure in advance. Our initial thinking for the reports includes:

17. Executive summary: Around 2 pages, summarising the main, top level content from the remaining chapters
18. Introduction: Pork KE context, evaluation objectives and evaluation approach summary
19. Pork KE implementation: How the programme intended to be delivered (business case), how it was actually delivered (including progress made against the business case), reasons for delivery journey, the challenges faced and overcome, concluding with the lessons learned for improving delivery and increase uptake and engage the pig industry
20. Pork KE effectiveness: An overall look at the effectiveness of Pork KE against its aims, including levels of uptake and engagement from the pig industry and stakeholders
21. Activity effectiveness: Chapters for each element of the programme, going into more detail about what was achieved, and what is working well and less well
22. Conclusions: A short summary of the main takeaways from the findings
23. Implications and recommendations: A discussion about what the findings mean for AHDB's strategic objectives, Pork KE's delivery and the effect on key audiences (e.g. levy payers), concluding with recommendations on how to strengthen the programme to best support achieving impacts.

We anticipate an interim report of around 15 pages and a final report, building on the interim report, of around 25 pages in Word, each with a 2-page executive summary. We intend to use charts and verbatim quotes to bring the findings to life. We are happy to use an AHDB template and brand guidelines for these reports, or our IFF templates.

It is important that you learn as we learn, and that you and your stakeholders are not surprised by the findings. To support this, we will occasionally share topline reflections from the research in our progress emails and we welcome you at our analysis sessions.

Your team

For your project, we propose a team that brings strong experience of evaluation design and execution, value for money assessment and expertise in the agricultural, rural and food sectors in England. Your team includes:

- [REDACTED], will oversee delivery and have ultimate responsibility for quality control and sign-off.
- [REDACTED] will scope and lead the value for money assessment.
- [REDACTED] will lead evaluation tool design and reporting, pilot the qualitative interviews and manage the contract.
- [REDACTED] will project manage the team and act as day-to-day contact for AHDB. He will lead the secondary analysis, conduct interviews and contribute to report drafting.
- [REDACTED] will lead the desk research and support project delivery.

Detailed experience for each team member is included in the 'Team' section of the main proposal.

1.23 Timetabling

Our project plan by week is provided below. We also have a plan by day so it is clear the start and end dates for each activity, and the organisation responsible. We welcome the opportunity to discuss these timings in the inception meeting to ensure decision milestones are planned for.

BACKGROUND

1.26 The Farm Excellence Platform (FEP)

The FEP facilitates knowledge sharing and innovation across all six AHDB sectors via “a network of inspirational farmers who open their doors to others to learn, share and create new ideas.”⁵ The operation is vast, with approach 100 host farms throughout the UK. The events, which are independently facilitated, are usually attended by levy payers and relevant stakeholders and are focused on improving “productivity, competitiveness and sustainability”⁶. At each host farm an AHDB Knowledge Exchange Manager is charged with planning and orchestrating the events:

29. Monitor and Strategic Farms Centre events: occur around 3-6 times per year, involving anywhere from 20 to 100 attendees. Host farms and demonstration sites act as live and locally representative case studies. Within this, monitor farms tend to be holistically focused with an eye to business performance whereas strategic events cover sector-specific learnings and technical performance.
30. Discussion groups and technical events: There are upwards of 200 discussion groups and technical events per year. the former tend to involve around 5-15 attendees while technical events can range from “small breakfast meetings for a handful of people up to conferences of 200-plus”⁷. These discussions are often led by specialists and industry experts and cover similar topics to the Monitor and Strategic Farm events in more detail.

1.27 Objectives

AHDB requires an outcomes and impact survey of those levy payers and stakeholders who have directly engaged in its Farm Excellence Platform (FEP), by attending an event, either virtually or in-person. As outlined in the brief:

31. The **primary purpose of this piece will be to deliver an evaluation of the FEP** in terms of its actual impact on the ground at a host, attendee and industry level. Specifically, it will look to determine current levels of perceived benefit and conversion of learning to reasoned action and improvement. This will then be repeated annually in order to measure progress/ impact over time.
32. The **secondary purpose will be to create an effective organisational baseline measurement** to inform forward planning and track performance over time.

The brief also positions the research as a unique opportunity to create a “synergistic collaboration” by researching and analysing the events across the piece; in the past, surveys and feedback loops have been designed (and facilitated) by individual sectors. Naturally, there was some variation in methodology as a result, limiting the scope for cross-sector analysis. Nevertheless, it will be important to ensure that the research continues to deliver the sector-specific information needs that have proved useful to date.

METHODOLOGY

1.28 Inception

A robust inception meeting is critical to understanding and agreeing the research requirements, objectives and associated approach. We suggest this [REDACTED]

[REDACTED] introduce you to our team, obtain a full briefing on the study background and

⁵ <https://ahdb.org.uk/farm-excellence-strategy>

⁶ Ibid.

⁷ Ibid.

the FEP and work through the project approach and timings (including Q&A and risks). We will also establish [REDACTED] for project management and formative feedback. After this meeting we will provide confirmation of everything agreed, any changes to the research approach or plan, and provide an updated project timetable (if required). As we go on to discuss, the metrics and desired approach are already well established, reducing the need for a full-scale scoping exercise, evidence review and e.g. [REDACTED]. Nevertheless, we have factored a day of [REDACTED] during the set-up phase to allow the team to become fully immersed in the background and research requirements.

At present, there are plans to [REDACTED] this bid is focused on this first year, it will be important to keep these future intentions in mind during the inception.

Although we anticipate that [REDACTED] will remain relatively consistent between the years, we will need to build in scope to e.g. build additional questions into the survey. We also propose to repeat an inception meeting at the start of each year.

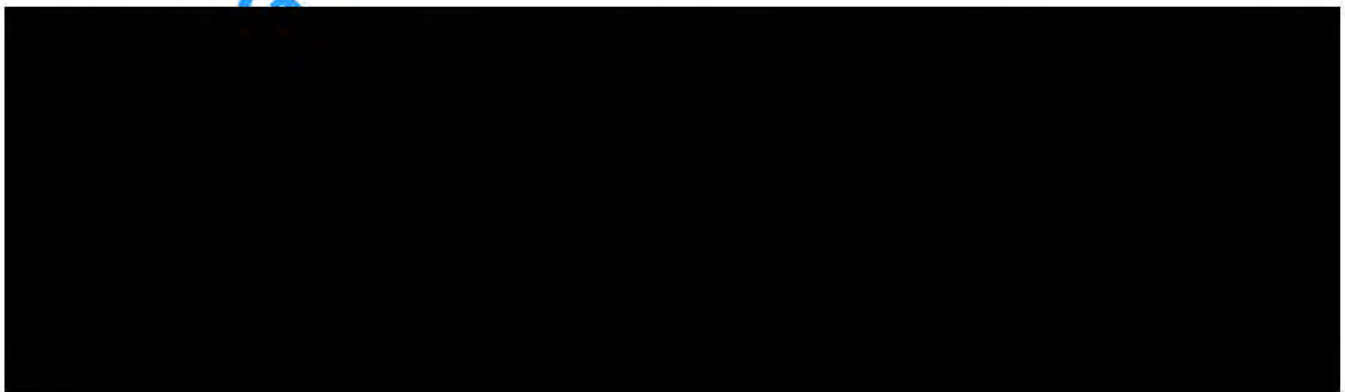
1.29 Sampling

We understand that AHDB will provide a database of relevant contacts from which to draw an appropriate sample. As noted in the brief, this will be compiled from those who have either attended an FEP event or logged into a webinar (and who have provided the necessary consent to be contacted). We have assumed that the database will be relatively complete but have built in some contingency budget for any final refinement.

Design

The brief is clear that the sample should be broadly representative in terms 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. We can discuss this further upon commissioning (and subsequent sight of the sampling frame) but – if there is sufficient sample to do so – propose a random “1 in n” draw and/or quota based approach; if the sample is randomly drawn in proportion then the survey profile should fall out naturally, but we may wish to make some adjustments to ensure sufficient representation across key/certain groups. It may be the case that some groups make up a small proportion of the population and a representative base too small to be statistically robust as a result.

In addition to ensuring a representative profile of commercial growers in each country, the sample will need to consider/ensure appropriate coverage across the sectors, with different products, services and campaigns used within each one, as well as an appropriate split by levy payers and stakeholders (we note the target of roughly 300 to 50, respectively, and agree that this is sensible). Other considerations include the fact that:



Quality control

The sampling approach will be developed in conjunction with AHDB and signed-off by the project Director. We will provide a written summary of the agreed stages to ensure understanding is aligned

and, following this, draw up a sample specification for our data services to work from. This will be signed off by the project manager and sense checked with the directors as required.

1.30 Questionnaire design

We suggest that the survey is [REDACTED]. The latter would be predominantly aimed at [REDACTED], but we would also allow respondents to complete the survey [REDACTED], or set an appointment for a later date.

An [REDACTED] flexibility for respondents, as they are able to take part in their own time and at their own pace (their answers will be saved so that they can stop or pause as much as they like, without needing to start from the beginning upon their return). This is particularly important for studies amongst time poor audiences such as farmers, who will have many other demands upon their time. Additionally, [REDACTED] cost-effective method of dissemination with the potential to engage a much larger sample (and therefore responses), without a proportional increase in cost.

Overview

As noted earlier, the core purpose of this research is to provide an evaluation of the FEP. With this in mind, the questionnaire will contain twelve customer metrics, eight of which are generic (i.e. applicable to all sectors) and four are sector specific. The latter will ensure that the research continues to deliver on the information requirements of each individual sector, as well as the programme as a whole. These metrics will also serve as a useful baseline for future research.

We will want to keep the survey relatively short to maximise respondent buy-in, engagement and quality of response (i.e. to avoid respondents rushing through it as they tire), but also to leave space for additional questions in future years. We therefore recommend (and have costed on the basis) that the survey take roughly 10-15 minutes to complete. In our experience this will provide sufficient time to cover the proposed question areas without having a detrimental impact on respondent experience and response.

How we design questionnaires

Close collaboration with you is key in the design and development of the questionnaire. Additionally, the IFF Director(s) will be involved during all stages of the design/set up and have the final sign off before we provide you with a draft questionnaire.

More generally, the key steps we will undertake:

1. Initial discussion of the programme approach, measurements and objectives, including an initial discussion of appropriate questions/metrics to address each. As part of the project inception meeting we will always [REDACTED]
[REDACTED]
[REDACTED] On occasions the questionnaire design may warrant facilitating workshops with stakeholder or Knowledge Exchange Managers for example, who will have a detailed understanding of their events.
2. Brief literature review considering the details of the FEP programmes and examples of past questionnaires (which we understand will be provided upon commissioning) alongside the baseline metrics/question areas outlined in the brief and key points from the inception.
3. Producing a first draft of the questionnaire and then working with you to refine in an iterative way.

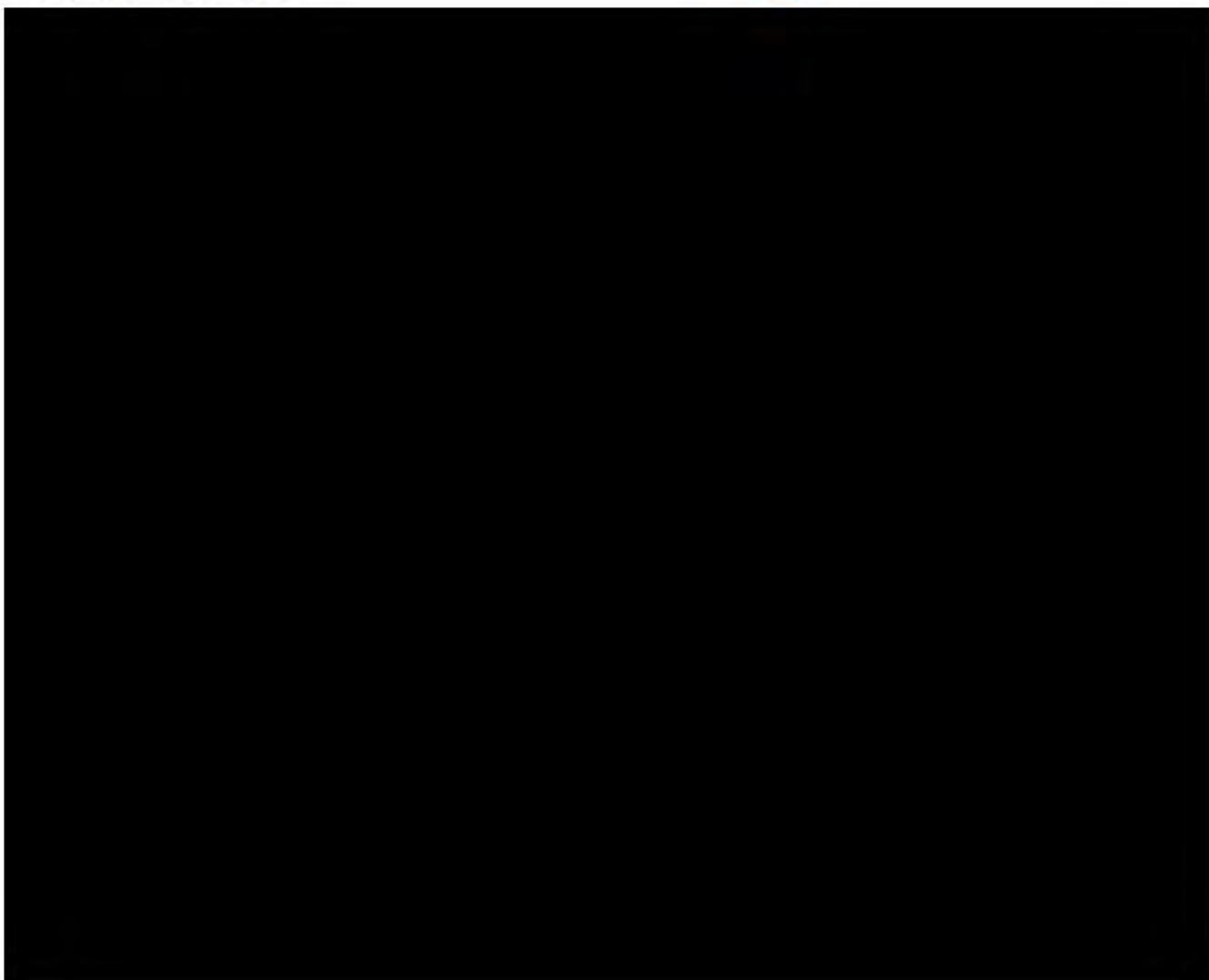
The next stage is [REDACTED] our survey platform. Our in-house team program our surveys, which are then tested thoroughly by the research team (see “quality control”). We use the same set up for online and CATI surveys, so those undertaking checks can easily switch from one mode to another.


Finally, we pilot the questionnaire. With online surveys the pilot study is predominantly aimed at any final ‘fine-tuning’ by reviewing response patterns – such as levels of “don’t know” responses – and open text fields, for any indication that specific codes are not working or that new ones could usefully be applied. Online pilots can also be useful for testing assumptions about survey length and associated response rates. To support the pace of the project, we recommend a rolling pilot, i.e. we will closely monitor the first 20 or so interviews as this will provide the necessary information as to the efficacy of the questionnaire without impacting timings or costs.

Baseline measurements

We note the statement in the brief that AHDB will be very much guided by the research supplier in terms of setting the pre-determined baseline metrics and we are very happy to work on this basis. The generic measurement requirements outlined here are summarised in Table 1 below, alongside some initial *suggestions* about question type/style.

Table 1: Survey content





With regards to the sector-specific metrics, we will consider the balance between continuity with previous questionnaires and innovation/improvement here, as it will be important to ensure that the research continues to deliver on the sector-specific requirements where possible. The measures will also need to account for variation across sectors but also within sectors, in the form of different products, services and campaigns etc. We welcome discussions on key areas of interest here at the inception.

As indicated in Table 1, we have assumed a need for c. 10 qualitative 'other specify' responses and a handful of entirely open-ended questions, across both the core and sector specific metrics. Coding of these will be conducted in-house and on an on-going basis, to codeframes agreed with AHDB.

As noted, there are plans to repeat the research a further two times. While this bid is focused on this first year, it will be important to keep these future intentions in mind when considering survey content.

Quality Control

IFF practices to ensure quality when conducting online research include:



1.31 Fieldwork

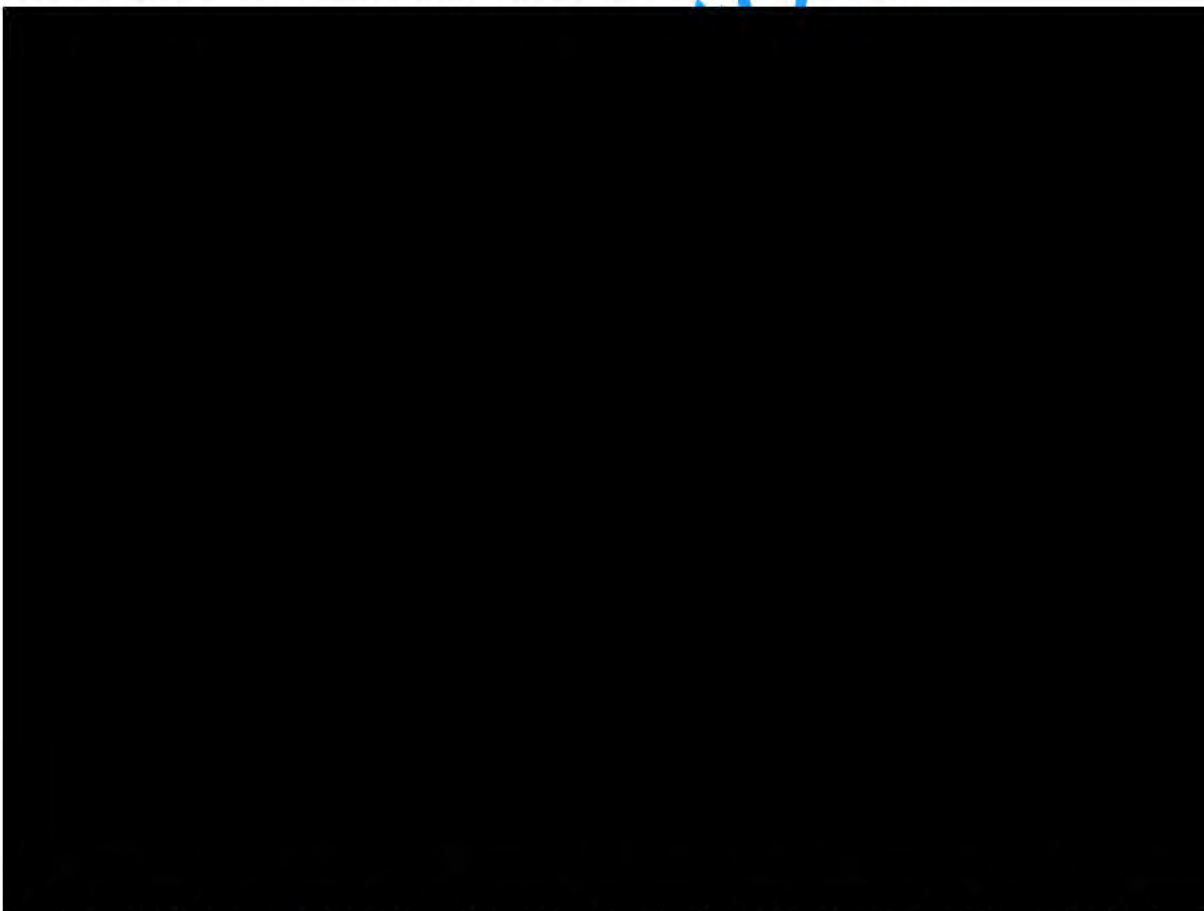
At IFF we pride ourselves on our ability to achieve response rates to the highest industry standards and levels, and very often to exceed them. The key challenge of any online research study is to ensure

optimal response by making the most out of the available/drawn sample. Nevertheless, the brief implies an overall target of c.350 responses and we are comfortable that is achievable, based on our experience of online surveys and the range of strategies for bolstering response at our disposal.

Maximising response

Email invitation: It is critical that the email is clear, concise and offers a 'hook' or selling point for taking part. We will also want to maintain momentum, and have planned for at least two follow up emails as a result. We have undertaken many cognitive studies over the years into the best means of positioning research and have consistently found that knowing how the research will be used and 'what's in it for participants' often drives their decision to take part. We will also want to account for the fact that levy payers are more likely to recognise sector events and activities that they have participated in as opposed to the term/ idea of the FEP as a whole. If this information is not contained in the sample, we will need to provide a broad description of the key events/activities that will resonate with relevant attendees. We can discuss this further upon commissioning.

Survey design: this is important in engaging participants and in ensuring a positive user experience. In terms formatting and colour the survey should look clear, engaging and recognisable, using AHDB branding where possible (see example of our branded platform below, with desktop on the left and mobile device on the right). There should also be a limit on the number of questions per page, to avoid a cluttered aesthetic and minimise the need to scroll. It is also important to consider other practical points, such as instructions on how to record a response and 'what to do next'.



Help-desk and additional materials/support: we tend to set up a dedicated email address and telephone number which will be well signposted on all correspondence. It would also be appropriate for you to assist in raising awareness of the study where possible.

Data security adherence and assurance: The legal basis for IFF Research processing personal data is based on it being used for research purposes in the public interest; and/or Explicit consent of the data subject. Our approach to establishing consent, and our processes for handling, collecting and processing personal data means all survey materials must:

4. Ask for clear consent from research participants and forewarning of asking for any sensitive data and an explanation that these can be used;
5. Explaining what sensitive data will be collected and how it will be used for analysis purposes (i.e. location, gender, age, etc.);
6. Explaining research participants' rights to see the personally-identifiable data we hold on them, to change this data, or to have it deleted within a given timeframe.

Telephone chasing

As noted, a key component of our proposal is to boost response using our Interviewing Services team, focused on encouraging online response and undertaking interviews on the phone if preferred by the respondent. We have budgeted for 150 calling hours accordingly. In terms of quality control, IFF is an accredited member of industry-relevant quality standards such as Interviewer Quality Control Scheme (IQCS), the industry mark of fieldwork excellence.

1.32 Data analysis

The focus of our analysis approach will be to identify differences in attitudes, perceptions and experiences at the overall level and by key subgroups. On the technical side, the data reduction phase of the project will involve steps such as coding of open-ended and "other" responses and verification of pre-coded and integer responses. We will also produce a clearly labelled and accurate SPSS data file and a set of data tabulations to a specification agreed in advance with AHDB. The tables will include responses to all questions against a set of cross-breaks. They will also include significance testing to highlight where any differences between a particular sub-group and the rest of the sample are statistically significant.

We will check that the demographic profile of survey participants closely matches the profile of the population covered within the survey, if this is known. If weighting is required the weighting targets and process will be discussed and documented in detail with you, alongside the sampling strategy.

Quality control

The specification for the data preparation will be signed-off by the Research Directors, including the approach to weighting (if this is required). Other standard procedures include:



Quality Assurance

We pride ourselves in our ability to deliver high quality research to time and budget, working to the highest possible standards in all areas of our work. IFF has demonstrated through our work for government departments and public sector organisations, our ability to provide the high quality of work that public scrutiny demands. The large amount of repeat business we undertake is further evidence of our ability to deliver and maintain quality (typically 80% of our business in any one year is for clients for whom we have worked previously. We have been working for many of our key clients for 10+ years). Beyond this, a high level of senior involvement at all stages in a project is a hallmark of the partnership's approach and our staffing ratios reflect this.

As IFF will be acting as the lead contractor, we have focused on our processes here. It is important to note however, that similar measures are in place at The Andersons Centre where relevant. At IFF, Directors play a very hands-on role particularly at design and analysis phases, for example, and the same is true of the Anderson Centre. As such, all documents we send to you will have been thoroughly reviewed by a project director or partner.

Membership and awards

IFF is a Market Research Society company partner and an accredited member of industry-relevant quality standards. We are a member of the Interviewer Quality Control Scheme (IQCS), for example, the industry mark of fieldwork excellence. This involves meeting IQCS quality standards, recording these for all projects, and an annual audit / inspection. This membership can be evidenced by visiting the IQCS website member listing section at www.iqcs.org. However, our interviewer recruitment, training and quality standards are higher than required by IQCS, reflecting the more demanding nature of much of our work. We also hold the ISO/IEC 27001:2005 accreditation (the international standard for information security).

Our commitment to quality was recognised in September 2020 when IFF was awarded the prestigious Best Operational Excellence accolade in the Market Research Society's (MRS) Operations Awards, amid stiff competition from agencies across the market research sector. According to the MRS the award is given to the agency or department "which best demonstrates their application of modern management techniques aimed at improving efficiencies, promoting excellent quality and guaranteeing consistency of delivery". This recognition, therefore, demonstrates our ability to deliver high quality research, with consistent and reliable results, offering you confidence and peace of mind in our ability to deliver.

Methodological design

We take a methodologically-neutral approach to developing a bespoke solution to your research needs. It is sometimes necessary to refine or adapt a proposed approach in response to developments 'on the ground'. Any changes to our approach will be designed and reviewed by the project director(s) in close collaboration with you. Where we feel a change in approach would be beneficial, we will prepare a short paper explaining how and why we recommend adapting the method alongside any consequences (both positive and negative) of doing so, alongside an updated risk register where appropriate.

Research instruments

Careful design of questionnaires and topic guides will ensure the information being gathered meets the research objectives to provide data that is meaningful, complete and accurate, while minimising the burden on research participants.

First draft materials will be planned by the project Director(s), drafted by the Project Manager, and then reviewed internally by the project Director before they are sent to AHDB for comment. We will then work with you to refine drafts in an iterative way. Where there is a particular need for agile design and fast turnarounds it will be especially vital that the first draft research instruments are as close to final as possible. We pride ourselves on the level of hands-on senior involvement in our research and the fact that IFF Directors and other senior staff will lead the design process should help to ensure this level of quality.

Sampling

Any sample we receive is reviewed at the headline level by the project manager, before being transferred to our Sampling Executive for more specialist and detailed checks, prior to processing. He is extremely familiar with checking/verifying sample databases, from ensuring that the number and profile of records matches to ensuring that there are no signs of possible misalignment. To guide this work, the research team will prepare a specification for processing and drawing the sample that will lay out the approach that we would want the sampling team to take. This will be signed off the Project Manager or above. More detail on our approach to data security is provided later in this section.

Scripting

IFF has an [REDACTED] led by an Associate Director, who are responsible for questionnaire scripting across CATI and online surveys using the Dimensions platform. Our DS team has over 45 years of experience between them. The processes we have in place to ensure quality in questionnaire scripting and testing are as follows:

- Strict version control protocols and only start scripting once the questionnaire has been signed off by the client.
 - Use of a bespoke Word template for all questionnaires, which allows consistent formatting and instructions (e.g. multicode ok/ single code only). This allows for faster set-up of more straightforward scripts, through a degree of automation. Logic checks are also included, where relevant.
 - Before scripting, the assigned programmer reviews the Word questionnaire to identify any routing queries, which will then be resolved with the research team.
- Once the first script is ready, it is checked internally by the programmer before being sent to the research team. These checks by Data Services take place at each round of script revisions.
- The research team checks the script thoroughly by working through the programmed script, checking question wording, screen accessibility (for online surveys), set up of single/multi-code responses, logic checks, and routing. If the routing is particularly complex, various scenarios will be set out in advance and assigned across several members of the team, to enable more efficient testing.

Alongside these checks, a researcher will check a 'dummy topline' and test data.

All feedback is aggregated in a change request log, which includes fields for who requested the change, when; who addressed the change, when; and who checked that the change has been made. This process is repeated until the script is ready for sign-off.

The Project Manager then does the final check/ sign off and fieldwork cannot start without this. If a script is very complex, the Project Director or AD will also review it at this stage.

An experienced member of the research team then checks the 'live' data a few days after fieldwork has started, once base sizes are sufficient to enable a thorough check.

Interviewing

As mentioned, IFF is an accredited member of the Interviewer Quality Control Scheme (IQCS), the industry mark of fieldwork excellence. We have rigorous processes, designed to optimise respondent experience, data quality and response rates, from quality control of interviewing to interviewer recruitment and training (the detail of which we are happy to provide on request). Interviewing quality control includes:

On all projects, interviewers receive a briefing to advise them of the background and objectives of the study, on whose behalf it is being conducted, how details have been sourced, etc. The briefing will be given in all cases by a member of the Research Team, and will include a through run-through of all survey questions. Members of the client research team are always welcome to attend and indeed contribute to this briefing.

Briefings are given in small groups, [REDACTED]

interviewers. There is a separate, more detailed briefing for all project controllers and field supervisors (who are responsible for monitoring the work of call-handlers, and who act as a first line of response where respondent and/or interviewer queries arise).

All calls to respondents are recorded, and as part of the requirements of the IQCS at least 5% of these calls will be listened in to. The work of each interview will be checked and quality controlled within the first 3 days of fieldwork. These QC procedures are documented: they involve the calls being scored on a set series of indicators (politeness, following the script etc.) and if any call handler scores below the acceptable level, they will be spoken to, the issue raised, an action plan agreed and signed, and their work further QC'd.

In accordance with the MRS Code of Conduct, we ensure that the appropriate permissions are sought when contacting respondents. Reassurances will also be made to respondents regarding the anonymisation of their responses and that their data will be handled securely at all times.

With regards to online interviews specifically:

Logic or validation checks are built into scripts – for example, requiring a range to be selected as well as an exact figure when entering numeric information to ensure an extra zero is not added or omitted; we will also build in 'soft' validation checks to provide guidance to respondents

We also monitor the pattern of responses to enable us to identify 'rogue' completes where respondents appear not to have given considered answers. For example, we would 'flag up' cases where respondents have given the same/similar answers to all questions or where the questionnaire has been completed very much faster than average (so, if the average survey complete time is 15 minutes we would scrutinise any completes which had been done in 5 minutes). We may re-contact these individuals to verify responses or we may simply exclude them from the final total.

Qualitative interviewing will be assigned to the research teams at IFF and The Andersons Centre. That said, should the scope of a particular exercise demand it, IFF have a pool of specialist qualitative interviewers to call upon.

Coding and data preparation

Coding, processing and preparation of the data files all takes place in-house.

- Data will be coded by our in-house coding team to a specification signed off by the Research Manager;
- The coding manager checks a minimum of 5% of the work of each coder. The coding team are briefed face-to-face by the research team;
- The specification for the data validation and checking will be signed-off by the Research Directors and agreed with you before use; this will include details of how cases 'failing' any validation checks will be handled.
- The specification for the data preparation will be signed-off by the Research Directors;
- The starting list of analysis cross-breaks will be developed by the Research Directors and agreed with you before programming;
- All datasets (tables and SPSS files) are programmed in-house by our experienced data services team, and then checked sequentially by multiple members of the research team, before being signed off by a director;
- A data dictionary will be supplied explaining every variable in the data file;
- If weighting is required the weighting targets and process will be discussed and documented in detail with you alongside the sampling strategy. The weighting approach will be developed by the IFF Directors.

Quantitative analysis

Analysis of the quantitative findings begins with multiple members of the research team immersing themselves in the survey data exploring key overarching themes, including:

- In relation to the initial evaluation objectives, what are the key overall emerging messages?
- How valid and reliable are these messages? What are the base sizes on which they are based and the degree of sampling error? How strong and consistent are these themes within the findings and is there 'counter evidence'?

- How do the findings / emerging messages compare to other published data (official stats, previous reports and surveys, Management Information)?
- What appears new, different or surprising?
- How does the story differ by key sub-groups or between the different audiences covered within the research?
- What statistical or other further analysis might help further understand what the data is saying?

The researchers then meet in a director-led analysis session in which the team compare and contrast their initial interpretation of the findings, discussing and scrutinising the evidence for these views. Typically, a consensus view emerges of the key themes. These are written up, and the data re-examined to check and verify these themes. Often a further discussion session takes place. We welcome your participation at either of these sessions.

Qualitative analysis

The process that we would typically follow for analysing qualitative material is as follows:

- Within the interview/group discussion itself - Within the discussion the researcher continually weighs up the implications of what the participants are saying – and devises relevant follow-up questions (where this helps us draw out additional insight to meet the evaluation objectives). Through this process of active listening and ‘weighing-up’ of feedback, the researcher exits the session with an initial view on the implications of the discussion.
- Individual post-interview/group review - The researcher uses the recording, the transcript/summary and any notes for personal analysis, re-immersing themselves in the content of what the participant said; the way in which they said it etc., in order to revisit – and potentially challenge – their initial view on the implications of the discussion. This will involve triangulating feedback from different sections of the interview. Notes are made of key take-outs, illuminating quotations, and areas to explore further etc.
- Entering data into an analysis framework - Individual analysis of each research session is entered into an analysis framework, under headings relating to the objectives – allowing sessions to be compared/judgements made about the commonality of views. The analysis grid is a dynamic document that will be added to during the fieldwork period as themes become clear. The primary themes from an attitudinal and behavioural standpoint will be taken into account with their own columns, as well as any elements of the participants personal situation impacting their outlook.
- Team Analysis Session - IFF then conducts a Director-led analysis session, in which researchers develop their thinking regarding the findings/their implications. Individual researchers bring to the session their tentative interpretation of the findings. This will be discussed, with careful reference to the evidence, to verify our interpretation of the findings through researchers applying a degree of scrutiny and challenge to each other’s perspectives. We welcome your participation in this session.

Desk-based research / literature reviews

- Lists of sources, and search terms to use to identify further sources, will be assembled by the Research Manager and signed off sequentially by the Directors and the client;
- The content of sources will be summarised to a template/structure, signed off sequentially by the Directors and the client;
- Summaries of findings will make clear our assessment of any limitations or biases in the sources;
- Summaries of findings will be checked by a Director before being shared with the client;
- Interim findings will be shared informally with the client so that queries can be resolved/further questions posed.

Reporting and presenting

A report / presentation structure will be agreed with you before writing begins, which will cover order, key messages, approach to subgroup analysis, look and feel, and intended audience. Our aim is to ensure that the final output meets your needs by directly addressing the project/evaluation objectives in an engaging and accessible way.

We deliver quality – encompassing writing style, analysis subtlety and quality of recommendations – primarily through the experience/seniority of the team writing and quality checking the output. In addition:

- We discuss key take outs with you before preparing reports, to create an opportunity to review analysis/recommendations and identify any further work required;
- Directors are actively involved in writing reports, writing key sections and reviewing all sections;
- Our protocols for checking reporting accuracy involve separate and sequential processes:
 - table to text and text to table figures;
 - grammatical and drafting accuracy; and
 - consistency and robustness of analysis.

A Director will undertake a final review before submission. In reality, the first 'client' draft is the second or third IFF-draft, with improvements made at each stage. The draft report is always supplied as if a final document, and ready for publication.

Our guiding principle in writing PowerPoint presentations is to use the findings to tell a clear story, so we always ensure each slide often begins with a 'headline' that sums up the key point being made. We also take care to include key 'take-outs' on each slide, i.e. ensuring the slide explains the practical implications of the findings for the research audience. Presentation charts will be prepared in PowerPoint and sent to you in advance to review and comment. Additionally, Directors will play a key role in delivering the findings at the presentation itself.

Our ethos is to balance keeping you fully informed while removing the burden of operational project management and a high level of senior involvement at all stages in a project is a hallmark of our approach. Indeed, our staffing ratios across the partnership reflect this. Directors and partners play a very hands-on role particularly at design and analysis phases. They frequently draft reports, conduct exploratory interviews, brief interviewers and design analysis specifications. As noted elsewhere, all documents we send to you will have been thoroughly reviewed by a project director.

Specific processes

We will devise detailed project plans at inception, used to plan internal logistics and guide weekly internal project team catch-ups. We will provide you with (at least) a weekly written update, detailing project status, highlighting risks and listing imminent actions. Fieldwork progress reports will be to agreed format, typically listing interviews completed, overall and according to the key breakdowns. A summary of the forthcoming risks to the project will form part of our regular weekly updates and we will, of course, alert AHDB to any issues and proposed solutions as soon as possible. In addition, we propose:

1.34 Approach to maximising evaluation effectiveness

We design and deliver evaluations in ways that support programme leadership make pragmatic and proportionate decisions swiftly, and that enable buy-in from stakeholders and end-users. We typically achieve this through:

18. Detailed briefing and stakeholder mapping to understand what the evaluation needs to achieve, and how best to design an evaluation that limits burden on programme stakeholders, stakeholder priorities and programme tensions.
19. Bespoke evaluation solutions, tailoring data collection techniques to maximise insight. This allows us to ensure we are going beyond the surface of what is happening and the reasons for this, to capture detail that can shine a light on practical solutions for improving a programme's effectiveness.
20. Clearly communicate the implications of the findings, situated in the wider programme and sector context. We do this by sharing emerging findings informally with the project manager throughout the evaluation and discussing these during catch-up calls, involving the project manager in our analysis brainstorms, and by workshoping implications in findings presentations with programme stakeholders.
21. Accessible, engaging outputs, including a short executive summary that is appropriate for end-users as well as strategic programme leads.

In this section we highlight 4 examples of our work that evidence how our evaluations have improved programme performance:

1.35 Evaluation of Local Delivery Pilots, Sport England (2017-2021)

To test whether a whole system change approach could unlock something ground-breaking for the whole country and find solutions to inactivity that are genuinely sustainable, Sport England has invested in a range of local delivery pilots (LDPs) across 12 specific places and commissioned IFF as the national evaluation partner, with University of East London. Our role is in co-ordinating, supporting and collating findings across the areas. This activity is influencing policy, environment, people and provision in tandem in order to lay foundations for lasting improvements to communities. The evaluation seeks to add value by identifying and sharing useful lessons through a community of learning, so that local delivery improves iteratively. In collaboration with Sport England and the University of East London, we synthesise the individual process evaluation reports into national themes every 6 months, collating qualitative process evaluation findings and quantitative impact findings from all of the 12 local areas coding up themes and workshopping these with Sport England and the local pilots to co-create a final output.

Some pilots have been using models / approaches, broadly as a means to conceptualise their system and how change happens within the system, to identify whether and how change is occurring and to plan ahead. A selection of the most relevant approaches are detailed in the figures below.

Recognise, Value, Change

What is the model, and what is it for?

- Calderdale's Recognise, Value, Change framework is designed to help organisations realise that they are part of the system and consequently the solution to creating an active population. The framework has three key elements:
 1. Recognise: help systems recognise that they are part of the system and consequently the solution to creating an active population
 2. Value: value PA as a means for meeting their own priorities and outcomes
 3. Change: as a result of the system recognising and valuing PA, the system makes changes to embed PA into what they do. This can also be described as the 'Embed' element.



How can it be used, and in what circumstances?

- Calderdale developed the framework because they felt that some systems in their area were including physical activity in their work because they were being asked to rather than because they understood the added benefit PA can bring to their offer. They've used the model alongside the Influencer Matrix and Utopia Modelling to get key strategic stakeholders to engage with the action planning process.
- The model can be used in a variety of settings, for example, during a recent presentation to school headteachers, the why was adapted to be about how the evidence shows that active children have better psychological outcomes, such as reduced stress and anxiety, increased academic achievement, cognitive functioning, and attention and concentration.

released. The results of the evaluation were also considered alongside an independent review of the TEF, conducted by Dame Shirley Pearce.

1.37 The Andersons Centre examples

The Andersons Centre tend to offer more bespoke services than programme level evaluations. They are well known to the AHDB and provide regular ongoing support to AHDB's operation, currently undertaking the Early Bird Survey for example.

In the past The Andersons Centre has supported AHDB and HGCA to help both in their evaluation programmes. In 2014, they produced an excel-based Cost Benefit Analysis tool, designed to be used to test the performance of all projects undertaken by the HGCA. They supported the researcher to calculate the overall benefit of a project by providing a mechanism and framework to calculate the commercial benefit of a project over a fixed period of time, helping to make sensible decisions on the uptake and effectiveness of each research outcome.

They also supported the completion of a series of evaluation assessments using the tool as demonstration for those who would be using the model.

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.

Draft - Subject to Contract

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
Buying Goods and S



Call off order form

Draft - Subject to Contract

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.

Draft - Subject to Contract