



The  
**Community Foundation**  
for Northern Ireland

Terms of Reference For Research Project

**“Vital Signs”**

April 2017

## 1. Background to the Community Foundation for Northern Ireland

### 1.1. Vision

**The Community Foundation for Northern Ireland connects people who care to causes that matter.**

For over 35 years the Community Foundation has been a trusted, secure means through which donors choose how, when and where they give, by helping them to set up funds, supporting them to make grants and to see the impact of their donations on local communities in greatest need.

We believe that a vibrant Community Foundation is a vital part of helping Northern Ireland move forward as an institution independent of the government and beyond party politics, built on voluntary contributions from the community and caring about the most marginalised and vulnerable in society.

The role of the Community Foundation is to develop a culture of giving based on relationships – as opposed to transactions – from local people and those with a local connection; to be a vehicle for connecting communities, enabling them to learn from others doing similar work, to share and be supported, and to feel the strength of people joining forces.

We bring donors and local communities together, supporting people to direct their giving to issues and causes that are important to them and to where it is really needed.

We do this because we want to see a Northern Ireland that is peaceful, equitable and values the contribution of local people and communities in achieving a shared and socially just society.

### 1.2. Strategic areas

We outwork our vision in three strategic areas:

- **Community Impact** - making grants (and potentially other forms of social finance) to support local communities, particularly to help the most marginalised and vulnerable, and investing in the kind of projects that other funders might not fund.
- **Donor Development** - effectively helping donors direct their money to causes that make a difference.
- **Community leadership** - listening to the communities we're working with, and based on what we're hearing advocating on their behalf.

### 1.3. Values

While pursuing our passion for giving and for social justice, we hold each other to account to act with the following values:

- **independence**, particularly from government and political affiliations
- **innovation** in our approaches to supporting communities and working with donors
- **flexibility and proportionality** in how we work with communities we're supporting
- **empowerment** of staff and communities
- **risk taking** in the projects we choose to engage with
- the importance of **transparency** and **honesty**

## 2. The Research Project

### 2.1. Project Name: Vital Signs

**2.2. Purpose:** To research and produce a report, called Vital Issues. This will in turn act as a baseline for the development of the Community Foundation's 'Vital Signs' guide to philanthropy in Northern Ireland.

### 2.3. Research Context

#### *What is Vital Signs?*

Vital Signs UK (hereinafter referred to as Vital Signs) is an annual community check-up conducted by community foundations across the UK that measures the vitality of communities, identifies significant trends, and reports by an agreed number of areas critical to quality of life.

Vital Signs is an initiative of UK Community Foundations, the umbrella body for all Community Foundations across the UK, and is designed to inform and promote the development of effective community philanthropy.

It will do this by:

- Measuring the health and vitality of local communities using a range of indicators
- Identifying those issues that present communities with significant challenges and opportunities
- Engaging a range of stakeholders in grading these issues, identify appropriate philanthropic responses and influence local priority setting and action
- Raising the profile of the Community Foundation as a community hub and source of local leadership in the field of community philanthropy

The Vital Signs initiative comprises 3 stages, with the latter two stages being completed by the Community Foundation staff directly:

1. **Production of the Vital Issues Report, a comprehensive, technical document which analyses and presents information from a variety of data sources under the agreed issue areas;**
2. Community consultation to gauge the perception and experience of local residents to provide a reality check of life in their county
3. Production of a final, marketable report which is widely disseminated to the stakeholders of the Community Foundation (*Vital Signs Report*).

### **3. Research Project Tender**

#### **3.1. Vital Issues Report**

This tender is for the research and development of a report called Vital Issues. This report will inform the development of effective community philanthropy in our area by providing a health check on key local issues informed both by national statistics and local knowledge and experience. We started our first Vital Signs in 2016 on ten broad themes (see here). This year, in 2017, we are going deeper on 2 themes: Health and Wellbeing and Education and Skills. This Vital Issues report will therefore provide the data under the two main themes, and in particular:

- Report on the vitality of Northern Ireland's communities using a range of nationally gathered statistics, alongside evidence from local experts.

#### **3.2. Production of Vital Issues Report**

The researcher must produce one Vital Issues report on:

1. Healthy and Wellbeing, with a particular focus on mental health
2. Education and Skills, with a particular focus on alternative education models, to include community education, family learning, etc.

For each of these areas, indicators should be selected/suggested that are:

- Well defined, measurable and quantifiable;
- Use current data, preferably and where possible from the last two years;
- Are easy to understand.

#### **3.3. Structure of the Final Report**

The structure of the reports must be as follows and as a minimum the report should contain:

- Abstract
- Introduction - to put final report into context and to set the scene
- Methodology, including descriptions of all indicators used
- A report of between 5 - 10 pages on each of the identified 2 themes.
  - The narrative for each Issue Area should reflect, comment on, and explore the statistics and the text should be academic in style, presenting supporting facts in an objective manner.
  - Any exceptional or unusual statistics (perhaps variance in performance at a district level) should be highlighted, as will any that have an interesting correlation to another statistic.
  - A range of different visuals to best present the data for each Issue area

should be included.

- Appendix: Sources of Research
- Appendix: Bibliography

### **3.4. Deliverables**

- Final report (proof read) as set out above in a word document
- Any data collected and or collated provided to CFNI

### **3.5. Delivery Timetable**

The preferred tender will be required to complete the project within the following timeline; this is to facilitate the requirements of the Community Foundation to produce their Vital Signs Report for October 2017. Individuals/organisations seeking to carry out this contract should be available in line with the following draft schedule and be in a position to prioritise this work for the Community Foundation.

- Initial meeting with CFNI to discuss approach by 26th May
- Review meeting with CFNI policy officer to discuss progress by 9th June
- The first draft of the Reports should be delivered to the Community Foundation by 30th June 2017
- This draft will be reviewed by the Community Foundation during the week commencing 3rd July 2017
- The Reports will be progressed, refined and finalised by the researcher during the period 10th to 21st July 2017
- The final report should be delivered to the Community Foundation by the week commencing 21st July 2017
- The Community Foundation will release their full Vital Signs Reports in October 2017

### **3.6. Copyright**

Authorship of the works will be acknowledged. However the copyright and any other intellectual property on materials provided by the Community Foundation or produced on their behalf, shall vest with the Community Foundation. All materials received, and software files created in the course of this project, should be returned to the Community Foundation at the conclusion of the project, in an agreed format. The reports should be produced based on the above dates and a copy made available to the Community Foundation for Northern Ireland. The Community Foundation for Northern Ireland should be invoiced for the work carried out on their behalf and the agreed contract sum will be paid on receipt of a satisfactory Vital Issues Report by the delivery date.

#### 4. Selection Criteria

Tenders will be selected for their ability to demonstrate a high quality and rigorous approach that offers value for money to the Community Foundation. You should highlight your suitability to fulfil the brief using examples of contracts you have worked on over the last two years.

##### 4.1 Pass or Fail Criteria

- Work undertaken in relation to carrying out commissioned research. Examples within the last 2 years should be drawn upon.
- Confirmation of capacity to deliver the work over the specified timeframe.

##### 4.3 Weighted Scoring Areas:

<b>Criteria</b>	<b>Score</b>
Understanding of the operating context and ethos of the Community Foundation for Northern Ireland	10%
Methodology	30%
Understanding of the issues within each of the Vital Issues areas as outlined in 3. above.	40%
Value for money	20%

The person(s) or organisation appointed will report to the Community Foundation's Policy Officer in the first instance.

## 5. Making a Response

You should respond to the invitation by supplying a maximum 4 page proposal, via one electronic copy, sent to [shouston@communityfoundationni.org](mailto:shouston@communityfoundationni.org) that should inter alia include the following components:

- Your understanding of the brief including the methodology and proposed approach
- Your understanding of the issues within each of the 2 theme areas as outlined in 3. above.
- Any comments you wish to make on the proposed approach
- Your ability to fulfil all the tasks and deliver the outputs in the timeframe outlined
- Who will be involved in the research with respective CVs
- That you will be contracted on a self-employed basis
- A statement of experience detailing your work in this area of research
- The names and addresses of two clients for whom you have completed similar assignments (detailing the nature of the work undertaken for them).

**Please note that while we have not attached a specific cost to this evaluation process, we anticipate it to be in the region of £1500-2000 inclusive of VAT and we anticipate that this should take between 5 and 7 days work. It is imperative that the successful applicant provides a flexible and robust approach alongside excellent value for money. Note that this is a maximum price contract, individuals/organisations should price accordingly to gain a competitive advantage.**

## 9. Further Information

Contact: Sara Houston: Policy Officer  
Email: [shouston@communityfoundationni.org](mailto:shouston@communityfoundationni.org)

Queries will only be accepted by email and responses will be made available to all those who have been invited to tender for this research project

## 10. Closing Date

The closing date for receipt of tenders is 12 noon on Monday 19th May 2017. These should be emailed to [shouston@communityfoundationni.org](mailto:shouston@communityfoundationni.org). Tenders received after the closing date will not be considered.

**Note that the Community Foundation is not obliged to appoint the lowest or any tender.**