



**Tender specification: Monitoring and evaluation for the Farmstrong Scotland wellbeing programme.**

Deadline for submission:	By 5pm on Tuesday 23rd July 2024
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Farmstrong Scotland is a new wellbeing programme launched in 2023 for farmers and crofters across Scotland. It is modelled on the highly successful Farmstrong programme in New Zealand which has been running since 2015.

Its purpose is to support farmers and crofters live happier, healthier and more fulfilling lives and to have more productive and sustainable businesses. It is a vocationally-focused, non-commercial programme which aims to equip farmers and crofters with the skills, tools and capacity to enable them to take care of their own wellbeing, to build mental and physical resilience and to view this investment as a key component of a thriving farming business.

**The Farmstrong Scotland story so far...**

Well known New Zealand Farmer and author Doug Avery toured Scotland in 2018 bringing his story about struggles with his own wellbeing and resilience building. His tour reached over 2,000 farmers and crofters across Scotland. Subsequently, a small group of committed farmers and industry leaders with a desire to reduce the number of farmers and crofters in Scotland reaching personal and business crisis were keen to bring Farmstrong to Scotland. With thanks to RHASS, NFU Mutual Charitable Trust and the Scottish Government, seed funding was secured in 2021 to undertake foundation research and develop resources. Movember, who were seed funders to New Zealand's Farmstrong are our main funding partners until 2025.

We now have a small team of three employed part time staff members, overseen by a strategic board. Currently, RHASS are supporting development and acting as Farmstrong Scotland's parent body. Work is currently underway to set up Farmstrong Scotland as it's own entity as a charitable organisation and to secure a longer term funding partner beyond 2025.

**Programme Goals**

Designed to help avoid crisis and make lasting change, the programme is built around the 'Five Ways to Wellbeing' – Be Active, Connect, Give, Learn, Take Notice – and positive psychology.

Farmstrong Scotland seeks to;

- fill the early intervention space, focusing on protecting wellbeing and highlighting the business benefits this can bring
- connect farmers and crofters from across Scotland through sharing wellbeing experiences
- provide a well profiled website to readily access wellbeing information, tools and resources specifically tailored for farmers and crofters wherever they are, whenever they need them
- align effort and strengthen signposting to other organisations currently offering crisis support services (eg RSABI, NHS services etc)

*“We want to see a resilient, thriving agricultural sector where farmers and crofters have a high level of wellbeing, aren’t overwhelmed and are equipped to cope with the challenges, change and uncertainty that lie ahead.”*

### **Farmstrong Scotland Core Message**

Farmers and crofters are the most important asset on the farm/croft. Developing small but regular habits that increase wellbeing provides reserves to draw on during challenging times. It also helps you to perform at your best, boost resilience, reduce stress, prevent injuries and manage your business better.

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### **Tender Purpose**

A key success of Farmstrong in New Zealand is that it is evidence-informed. It uses research findings to demonstrate need, inform design, adapt delivery and measure impact. In seeking real change in Scotland, we will need to continually test our assumptions and learn from those who use (or potentially use) the programme about what works to deliver change and desired outcomes. We want to help improve their wellbeing by providing farmers and crofters with what they want, in a format they tell us they are most likely to use.

Being a small team with a large reach, Farmstrong Scotland is also reliant on wider industry support for its delivery. We therefore need to ensure that we continue to foster and maintain successful partnerships with key industry players.

To ensure that Farmstrong Scotland is relevant, sustainable and has maximum impact, it is important that we evaluate impact from the establishment and launch phases and gain insight from the first two years of implementation of the programme (2024-2025). We need to know what works from the point of view of both farmers and crofters (as users), and wider industry (as stakeholder supporters).

Farmstrong Scotland therefore wishes to commission research to provide insight data to allow us to:

- review progress
- support decision making
- measure impact
- ensure accountability

Ensuring that farmers and crofters needs are at the heart of the design, development and delivery is at the heart of the programme in order to ensure that we facilitate change and have lasting impact.

### **Key Research Insights Required:**

1. From our users, or potential users
  - a. Levels of awareness of Farmstrong Scotland
  - b. Levels of engagement with Farmstrong Scotland, and which methods are best
  - c. Which aspects of the programme users find particularly helpful
2. Compared to baseline levels, does exposure to the programme lead to the following outcomes:
  - a. Increased awareness, knowledge and skills about the importance of taking active steps to improve wellbeing
  - b. Increased knowledge and skills related to wellbeing promoting habits, including the 5 ways to wellbeing
  - c. Improved wellbeing among farmers and crofters
3. From Farmstrong Scotland partner and stakeholder supporters
  - a. Levels of engagement, satisfaction and support and their views of what works, what doesn't work and what could be improved.

These measures will provide evidence as to what contribution Farmstrong Scotland is making to improving farmer and crofter wellbeing in Scotland.

### **Scope**

Prior to launching the programme, we undertook foundational research which explored the wellbeing priorities of farmers and crofters across Scotland and provides us with a baseline against to measure change. (Further details can be found in Appendix 1).

Seeking to build on this foundation research, this tender falls into two distinct work streams:

#### **Workstreams 1a and 1b - Annual Monitoring 2024 and 2025**

Purpose: To collect data annually that will inform and guide programme implementation and then feed into programme evaluation (Workstream 2).

We expect this work to take the form of an annual survey of at least 500 farmers and crofters across Scotland and be undertaken in October 2024 and 2025, with reporting completed by 31 December each year. The survey will need to reflect a representative cross section of Scotland's farmers and crofters reflecting age, gender, farm type and geographical locations. It will include questions that will allow comparison against the baseline survey.

Although primarily quantitative we would also expect some qualitative work to be undertaken.

We do not anticipate that the survey will question the same individuals each year, although if it is possible to revisit participants, that would add value to the data. Tenderers are invited to propose what they see as the best methodology to align with the purpose.

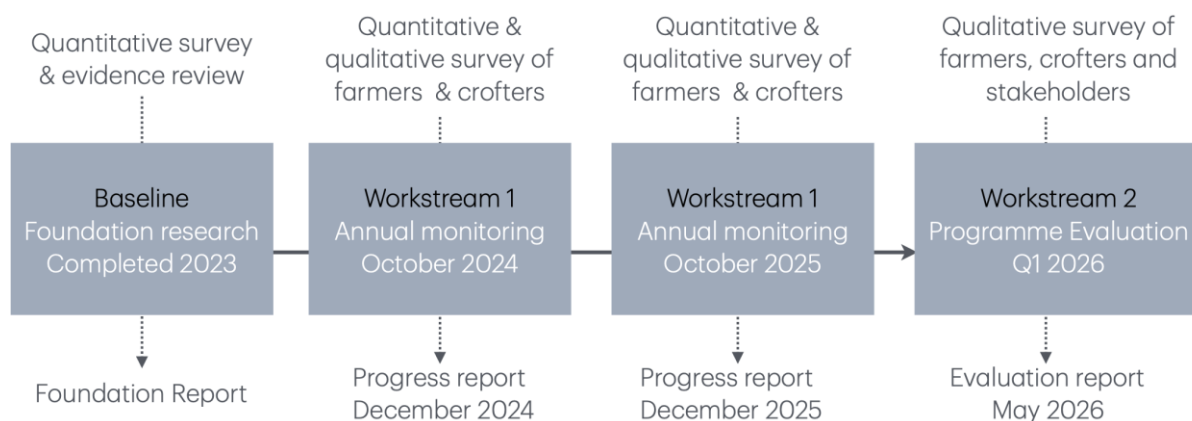
The key indicators used to monitor wellbeing among the target population should be consistent with those used in baseline research conducted by SRUC – see Appendix 1. Farmstrong Scotland will work with the agency appointed to build the survey, however to ensure consistency the key indicators (detailed in Appendix 1) will be included initially, although may be subject to changes as required in the future.

### Workstream 2 - Programme Evaluation

Purpose: To assess the impact, effectiveness and characteristics for sustainability of the Farmstrong Scotland Programme.

We expect this work will connect data from the annual monitoring surveys (Workstream 1a and 1 b) alongside qualitative survey undertaken with approximately 50 farmers and crofters. This will include those who have used Farmstrong Scotland for specific questions on the programme, and some of whom are aware of, but have had low engagement with Farmstrong Scotland. This qualitative work will also include a separate group of up to fifteen of our key stakeholder organisations.

This programme evaluation work will be conducted in the first quarter of 2026 with the report to be completed by 31 May 2026. Tenderers are invited to propose what they see as the best methodology to align with the purpose.



### Target Audience - Industry Background

Approximately 66,700 people work in Scottish agriculture (this includes owner-occupiers, family members and seasonal staff). Scotland has a range of farm types covering dairy, arable, soft fruit, horticulture, deer, arable, pigs and poultry. Cattle and sheep systems make up the largest holding type and cover the largest land area.

Crofting is unique to parts of the Highlands and Islands and is culturally important. A croft is a relatively small agricultural land holding and typically part-time.

The scope of this work seeks to reach farmers and crofters from across Scotland. Whilst Farmstrong Scotland can provide some contact details, tenderers will need to highlight if

they have access to any existing panels or other methods for reaching the audience and demonstrate a track record of accessing and engaging with appropriate survey sets.

Extreme external factors at the time of research should be considered ie. Disease outbreak, extreme weather event, market prices.

### **Methodology**

Tenderers are invited to put forward proposals on how to best meet the outcomes for this proposal within the budget available. A full explanation of your chosen approach, including any limitations, should be provided.

### **Deliverables**

The primary outputs from each work stream will be;

- a written report for each workstream. The reports should include an executive summary - of no more than two pages, detailing the key findings, within the full project report of no more than 50 pages (excluding appendices) to include:
  - Narrative of the results responding directly to the key aims
  - Main findings
  - Conclusions, including actionable recommendations
  - Appendices – to include:
    - The methodologies used and underlying assumptions
    - Detailed results e.g. underpinning evidence or data
- a presentation to Farmstrong Scotland and any relevant stakeholders, prior to the finalisation of each report that details the findings, and provides an opportunity for questions and discussion.
- cleaned data sets – any cleaned data files from the study, including any interview transcripts and other appropriate data.

To ensure all outputs meet quality standards and the needs of Farmstrong, time should be allowed for at least two revisions to the draft report.

The results from this work will be used to feedback to the Farmstrong Scotland Operational Team, the Farmstrong Scotland board and funders. The report in full and any key findings may also be published on the Farmstrong Scotland website. All deliverables need to be written in a format that can easily be understood by a range of readers.

The ownership of the research material including the final report and any data produced as a result of the research lies with Farmstrong Scotland.

Please note: Farmstrong Scotland are currently going through the process of becoming a SCIO. In the meantime, The Royal Highland Agricultural Society of Scotland (RHASS) are acting as the parent organisation until the SCIO is in place.

## Tender management and governance

This work is being commissioned by Farmstrong Scotland and will be managed on behalf of Farmstrong Scotland by Programme Director, Alix Ritchie. The monitoring and evaluation sub-group, made up of two board members and a representative from funders Movember, will support the Programme Director with assessing tenders, agreeing proposed methodology, and project planning. They will also support with comments on any draft findings, the report draft and sign off on the final report, plus any outputs for publication.

Regular update calls will be scheduled weekly (frequency to be altered as required) between the successful tenderer and Farmstrong Scotland Programme Director to discuss progress and address any issues, escalating to the steering group for consideration where necessary.

## Tender Timescale

	Deadline
Invitation to tender circulated	Wednesday 26 <sup>th</sup> July 2024
Last date for suppliers to ask clarification questions	Tuesday 16 <sup>th</sup> July 2024
Deadline for receipt of quotes	By 5pm on Tuesday 23 <sup>rd</sup> July 2024
Presentation on proposal to selection panel	w/c 29 <sup>th</sup> July 2024
Notification of intended award of contract	Maximum of 1 week after selection panel
Contract commencement	August 2024
Draft report and presentation for Workstream 1 - 2024	29 November 2024
Final report for Workstream 1 - 2024	31 December 2024
Draft report and presentation for Workstream 1 - 2025	28 November 2025
Final report for Workstream 1 - 2025	31 December 2025
Draft report & presentation for Workstream 2	30 March 2026
Final report for Workstream 2	31 May 2026

## Submitting a Proposal

Please send a brief work plan (no more than six pages excluding CVs) responding to the award criteria below.

To include:

- Proposed methodology for each workstream, including how data will be reported/presented
- A proposal of how you will approach recruitment
- Proposed delivery timetable, with key phases and deliverables indicated
- Total cost, broken down into the number of person days' work proposed and applicable day rates. Workstream 1 and 2 must be separately costed.
- A brief description of your consultancy and project team members, including relevant experience
- Examples of previous work and testimonials

CVs for the proposed delivery team can be added as an appendix out with the six page limit. Your submission should be a single document in PDF format. You should also highlight any potential conflicts of interest in your proposal.

Proposals need to be submitted to [alix@farmstrongscotland.org.uk](mailto:alix@farmstrongscotland.org.uk) by 5pm on Tuesday 23rd July 2024. Any documents or amendments submitted after the deadline will not be accepted. Any clarifications questions regarding the specification should be submitted by email at least 5 working days before the bid submission deadline above.

The shortlisted bids will be invited to present their proposal virtually to a selection panel.

We expect to contact the successful bidder within a month of the closing date.

The total costs of proposals (workstreams 1a, 1b and 2) for this project are expected to be in the range of £50,000 - £60,000 (excluding VAT), and no more than £65,000 (excluding VAT). However, Farmstrong Scotland would welcome proposals for less than this amount. We welcome consortium bids.

If you feel the scope of work is out with the budget set out above, please specify a suggested 'best approach' that would fall within the budget specified.

Depending on the quality of proposals received, Farmstrong Scotland may chose not to appoint any contractor. Farmstrong Scotland is not bound in any way and does not have to accept the lowest or any tender, and reserves the right to accept a portion of any tender, unless the tenderer expressly stipulates otherwise in their tender.

## Award Criteria/Tender Evaluation

To ensure best value of money, tenders will be evaluated on both qualitative and financial criteria. Tenders will be scored using a scoring matrix with weighting criteria set out below and in appendix 2. The highest scoring bid will be considered the most economically advantageous tender and the successful bidder.

Evaluation will be based on the following criteria and weighting:

Descriptor	Weight
Overall proposal demonstrates clear understanding of the research requirements, meets the scope and outcomes being sought and is presented in a clear and organised manner.	20%
Clear demonstration that methods proposed will generate quality insights on the research topic, and be representative of farming & crofting in Scotland	20%
Proposal demonstrates ability to manage the project within timescales with sufficient resource of experienced staff	10%
Proposal shows clear descriptions and documentation of technical expertise and relevant experience of those who will be delivering on the project.	20%
Competitiveness of cost. The costing provided represents value for money, taking into consideration the type and complexity of approach proposed, the team's level of experience, the benefits that are expected, the costings of other proposals received, and the available budget.	30%

**Terms & conditions**

The successful organisation will be required to enter into a contract for services with Farmstrong Scotland. Payment terms for the contract will be expressly linked to the project timetable and will be subject to milestone delivery.

The contract will have a scheduled end date of May 2026.

Farmstrong Scotland reserves the right to terminate services in accordance with the terms set out in the contract.



## Appendix 1

Foundation Research Report: [SRUC Farmstrong Scotland Report – Part 1.](#)

Based on this research, a number of dashboard measures were created to be included in the annual monitoring survey of a sample of farmers to demonstrate continuity. These were:

- Level of contact with family and friends
- Amount of exercise I do
- Volunteering in my local community
- Helping other farmers/crofters
- Taking time and taking notice of the small things in life that bring me enjoyment
- Time spent learning new things
- Increasing the amount/quality of sleep
- Having more time away from the farm
- Improved physical health
- Reducing injuries at work

## Appendix 2

### Scoring of Tenders

Assessment	Score	Summary	Interpretation
Excellent	5	Very strong evidence of appropriate knowledge, skills or experience.	As well as addressing all, or the vast majority of, bullet points under each criteria heading, it will demonstrate a deep understanding of the project. All solutions offered are linked directly to project requirements and show how they will be delivered and the impact that they will have on other areas/stakeholders.
Good	4	Sufficient evidence provided of appropriate knowledge, skills or experience. Have confidence in their ability to deliver the required service	Will reflect that bidders will have addressed, in some detail, all or the majority of the bullet points listed under each criteria heading. Evidence will have been provided to show not only what will be provided but will give some detail of how this will be achieved. Bidders should make clear how their proposals relate directly to the aims of the project and be specific, rather than general, in the way proposed solutions will deliver the desired outcomes
Acceptable	3	Reasonable evidence of appropriate knowledge, skills or experience. Meets requirements in many areas but not all.	Will again address the majority of the bullet points under each criteria heading but will lack some clarity or detail in how the proposed solutions will be achieved. Evidence provided, while giving generic or general statements, is not specifically directed toward the aims/objectives of this project. Any significant omission of key information as identified under each criteria heading will point towards a score of 3.
Minor Reservation	2	Some evidence of appropriate knowledge, skills or experience. Meets requirements in some areas but with important omissions	Will reflect that the bidder has not provided evidence to suggest how they will address a number of bullet points under the evaluation criteria heading. Tenders will in parts be sketchy with little or no detail given of how they will meet project requirements. Evidence provided is considered weak or inappropriate and is unclear on how this relates to desired outcomes.
Serious Reservations	1	Very little evidence of appropriate knowledge skills or experience	Will reflect that there are major weaknesses or gaps in the information provided. The bidder displays poor understanding and there are major doubts about fitness for purpose.
Unacceptable	0	No evidence/response	Will result if no response is given and/or if the response is not acceptable and/or does not cover the required criteria.