



# **Bellweather interviews brief**

## **Economic systems change**

**Close of tender: 25 September 2023**

## Purpose of the Brief

Friends Provident Foundation is seeking the services of an agency to conduct a series of interviews on its behalf to assess the state of the economy and areas of need for economic systems change.

Our grants programme aims to seek out and support activities and ideas pushing for changes in our economic system to make it fair and sustainable. By systemic change we mean work pushing at how structures operate, behaviours of key economic players, challenges to how the economy is thought and spoken about. We do not prioritise work to alleviate more immediate problems caused by the economic system.

For more information on the types of work that we support please visit [our funding page on our website](#).

As part of our continuous approach to learning we wish to scan the horizon wider than our current points of contact to ensure that we are factoring in all possible viewpoints on what is currently happening within the economy.

## Required Outputs

It is anticipated that the work would involve a series of 10-12 interviews with key voices across fields such as policy, academia, journalism, community organising, and other funders. The interviews would then be presented to the Foundation as a brief report and optional presentation giving a snapshot of the problems and gaps in current economic systems change work in the UK. The participants for the interviews will be discussed and agreed with the Foundation in advance.

## Background and Context

Friends Provident Foundation is an independent endowed charity with a vision of a fairer economy and a better society. It works towards this through grants, social investments, mainstream investments and building networks and communications. The Foundation takes an integrated approach to its mission and capital base and alongside grant making uses its endowment as a tool for change, including through social investments and shareholder engagement.

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You can access our mission and programme [here](#)

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## Roles and Responsibilities

The Foundation operates from its office in York, led by the Foundation Director with a staff of eight. Governance is through the Foundation's board of trustees to which the staff report. The appointed agency will be expected to work to the Grants and Learning Manager to deliver this work.

## Selection Process

Written responses to this brief will be assessed against the following criteria:

- Response to the specific requirements of the brief
- Quality of the proposal
- Methods proposed
- Successful track record of similar projects
- Experience of working with other charities/foundations
- Value for money
- Suppliers to the Foundation should include consideration of whether they are Living Wage employers, by the criteria of the Living Wage Foundation

In making this tender appointment the Foundation may positively seek out organisations with a social purpose, and be mindful of local economies. We will also seek to ensure that any services provided are undertaken by organisations whose other business practices are consistent with the principles of [our investment policy](#) in terms of negative and positive screens.

Shortlisted agencies will be invited to discuss their proposals with staff, either in person or online, on a date to be confirmed.

## Budget

The guide price for this contract is £8,000 (inclusive of VAT and expenses). Applicants are asked to submit a detailed budget for the work, including a breakdown of fees and allocation of time. Quotations should be inclusive of VAT and all expenses.

## How to apply

To apply please send a proposal for the work that is relevant to the brief by 9am on Monday 25th September 2023 to Jo Wilce, Grants and Learning Manager at [enquiries@friendsprovidentfoundation.org.uk](mailto:enquiries@friendsprovidentfoundation.org.uk). We will acknowledge receipt of your application.

If you would like a brief, informal, discussion about the work, please contact Jo Wilce on [joanne.wilce@friendsprovidentfoundation.org.uk](mailto:joanne.wilce@friendsprovidentfoundation.org.uk)

References will be requested and taken up for any shortlisted firms, prior to appointment.

## Timetable

Issue of tender	Friday 18 August 2023
Close of tender	Monday 25 September 2023, 9am,
Discussions	TBC Late September/October 2023
Appointment	expected week commencing 16 October 2023 for work to commence shortly after