

LEADERSHIP, INTRODUCTION TO RESEARCH MANAGEMENT, AND ENTREPRENEURSHIP & INNOVATION TRAINING PROGRAMME(S) FOR EARLY CAREER RESEARCH FELLOWS (LOTS 1, 2 & 3)

Invitation to Tender

Background

The British Academy is the UK's national academy for the humanities and social sciences. We mobilise these disciplines to understand the world and shape a brighter future. From artificial intelligence to climate change, from building prosperity to improving wellbeing – today's complex challenges can only be resolved by deepening our insight into people, cultures and societies.

We invest in researchers and projects across the UK and overseas, engage the public with fresh thinking and debates, and bring together scholars, government, business and civil society to influence policy for the benefit of everyone.

As a registered charity, Fellowship and National Academy, the Academy undertakes a range of activities that provide public benefit either directly or indirectly. These include providing financial support and funding programmes for researchers at various stages of their careers.

The Academy is seeking to commission a Supplier or Suppliers for three training programmes tailored to its research fellowship award holders, specifically the Academy's Newton International Fellowships although the opportunity may be opened up more widely.

The Newton International Fellowship scheme aims to attract the most promising early career postdoctoral researchers from overseas in the fields of the social sciences and the humanities. The scheme supports the development and training of postdoctoral researchers at an early stage of their career from any country outside the UK, by providing an opportunity to work at a UK research institution for two years.

The three training programmes are as follows and the Academy is seeking a Supplier or Suppliers on a one-year pilot basis (please note it is possible to bid for an individual, selection or all Lots), after which a decision will be taken whether and/or how to continue such training and development courses more long-term:

1. **Lot 1** refers to the tender for the development and delivery of a **Personal Leadership Development in Research programme**.
2. **Lot 2** refers to the development and delivery of a training programme for an **Introduction to Management and Leadership in Academic Research Environments**.
3. **Lot 3** refers to the tender for the development and delivery of an **Entrepreneurship & Innovation training programme**.

Background to the project

Supporting excellence in the humanities and social sciences through our research fellowship programmes is one of the activities undertaken by the Academy to achieve its mission. The Academy's fellowship programmes include schemes that support many talented early career researchers with the potential to be future leaders in the humanities and social sciences.

Leadership in research requires more than excellence in research and the Academy has long recognised the importance of high-quality training, mentoring and support. By providing focussed training programmes, the Academy is equipping our early career research fellows with the knowledge and skills to lead and manage a team in an increasingly diverse and global research environment.

High-quality leadership training is a priority for British Academy early career research fellows (Lot 1).

Structured training provision for research fellows starting to establish their team and manage for the first time (Lot 2). Research fellows have highlighted the need for a tailored programme focussed on introducing management and leadership in academic research at the start of their fellowship award. As well as being new leaders, many will be first time managers of people and budgets, possibly starting out in a new academic institution and/or relocating to the UK from overseas.

Research Entrepreneurship & Innovation is vital for solving real world problems (Lot 3). The Academy would like to develop an entrepreneurship & innovation training offering to develop its research fellows' awareness of and aptitude in research entrepreneurship and innovation, with options for researchers with different levels of experience in entrepreneurial and innovation literacy.

Our research fellows represent a diverse group of people including different research fields and subject areas spanning the humanities and social sciences, different nationalities, will be located at academic institutions around the UK and will have different career paths and backgrounds.

Service Requirements

The purpose of this tender is to develop and deliver training programme(s) focused on leadership in research (Lot 1), an introduction to management and leadership in academic research environments (Lot 2) and research entrepreneurship (Lot 3) tailored to the needs of British Academy funded early career research fellows:

- Lot 1: Personal Leadership Development in Research Programme
- Lot 2: Introduction to Management and Leadership in Academic Research
- Lot 3: Research Entrepreneurship & Innovation Programme

Please note it is possible to bid for an individual, selection or all Lots.

The successful Tenderer/s shall be offered a 1-year agreement as the Academy aims to use the coming year as a pilot during which a decision will be made to continue and/or extend the Academy's training and development offer. Within the year, it is expected there will be minimum of two iterations of Lot 1 and Lot 2 courses and one iteration of Lot 3's course (i.e. both the foundational course and the follow-up course).

The delivery of the first round is expected to start in March 2023.

While some high-level themes have been suggested below, the Academy would welcome suggestions from prospective Tenderers of high-quality content and innovative approaches for a forward-looking and impactful training programmes. We would hope suppliers would draw on their expert experience and/or sector knowledge to inform the design of each one.

Personal Leadership Development in Research Programme – Lot 1

Rationale: Research leaders in academia and the wider research sector are working in a diverse, global and evolving environment. As such the Academy knows established and aspiring research leaders need to draw on a wide range of skills and competencies to be an effective leader to help them contribute to an open, inclusive and thriving research culture and manage both failures and successes.

Aims: The Academy seeks to offer a high-quality leadership development programme that is specifically tailored to the needs of early career academic researchers, facilitating their transition to an independent career leading their own research and team in academia. The programme should ideally include the following outcomes for the delegates:

- a. offer insights into what it means to be an effective leader in academia embedded in a strong understanding of the UK research and higher education environment.
- b. equip them with the skills that will support their transition to a leadership role and advance their ambition to become a research leader.
- c. enable them to develop a good understanding approaches to leadership and allow them to develop their leadership skills and approach/style.
- d. how to develop and support strong team and research culture and understand the importance of diversity in teams.
- e. enable them to confidently navigate challenges as a new research leader in an evolving research landscape, including influencing and negotiating skills, managing setbacks and failures, conflict resolution and decision-making.
- f. know how to balance competing demands, self-management.

Introduction to Management and Leadership in Research – Lot 2

Rationale: To facilitate a strong start to their fellowship, the Academy seeks to ensure research fellows are equipped with the skills to effectively develop and manage a new research team, budget and research programme as well as establish their independent scientific identity/profile as a research leader. With this the key themes should include managing and recruiting a team, project and resource management, developing research strategy and leading (international) collaborations.

Aims: To provide early career research fellows a high-quality introductory training course that shall equip them with the skills, knowledge and confidence to effectively build and develop a new research team in academia, manage and plan their own budget and resources and develop a research strategy in line with their fellowship.

The course shall complement the Leadership Programme (Lot 1) (and the Academy expects there will be unavoidable overlap). This introductory course should ideally include the following outcomes for the delegates: (and is by no means exhaustive):

- a. develop the skills to recruit staff and PhD students to their group, and effectively develop and manage their team.
- b. learn how to establish, lead and manage effective international and research collaborative teams/projects including developing effective networks/relationships.
- c. offer insight into developing a research strategy, establishing project plans and how to navigate challenges.
- d. enable them to understand the essentials of project management in a research environment, including planning, identifying key stakeholders, and resource, risk, and budget management.

- e. learn how to set themselves up as a new group leader, self-management, career planning, and establishing their scientific profile within a new or existing organisation.
- f. allow them to develop how to handle difficult conversations, negotiate and influence.

Research Entrepreneurship & Innovation Programme – Lot 3

Rationale: Entrepreneurship and innovation in research is fundamental to enabling translation of research ideas to address real life problems, and in order to become an effective entrepreneur or innovator commercial and wider skills and awareness must be developed. The Academy recognises that research fellows may come with differing level of experience in this area. The main offering shall provide an introduction to research entrepreneurship and innovation from understanding intellectual property, financial literacy, cultivating an entrepreneurial and innovative mindset as well as the challenges and opportunities associated. For researchers already on the path to commercialisation or social innovation a shorter follow up offering is sought to develop their ability to evaluate and establish business strategy, the frameworks of driving forward new ventures, as well as the evolution of such ventures from inception through to delivery and implementation.

Aims: To provide research fellows with the knowledge, and confidence to help them pursue and succeed in entrepreneurial and innovative opportunities as well as developing an understanding of the environment within which these can thrive. This being met through training in two parts – a foundational course with a shorter follow-up course.

The foundational entrepreneurship and innovation course should ideally include the following outcomes for the delegates (and is by no means exhaustive):

- a. learn what it takes to be an effective research entrepreneur and/or innovator.
- b. understand the role of intellectual property in entrepreneurial and innovative opportunities.
- c. equip them with the skills and understanding of financial literacy and its role in ventures.
- d. allow them to differentiate between an academic and business/charitable processes and learn how to cultivate an entrepreneurial and/or innovator mindset.
- e. learn about routes of ventures from inception to delivery and implementation with the opportunity to discuss and link to real-life examples.

The follow up, shorter, entrepreneurship and innovation course should build on the previous content and include the following outcomes:

- a. develop skills to effectively evaluate and establish business strategy.
- b. learn the frameworks of driving research-based ventures forward.
- c. offer insight into how to evaluate venture opportunities for their feasibility, creativity and the practicalities associated.
- d. enable them to discuss and evaluate their own potential routes to delivery and implementation.

Delivery

Pedagogical approaches

All three of the training courses shall offer a variety of pedagogical approaches, including group and individual work (for example, coaching), case studies, practical elements, opportunities for feedback and structured action learning sets. It is important that delegates can reflect and bring forward their own experiences to personalise the training specific to their needs. Where possible examples should be used with relevance to the attendee's experience and career stage.

The courses shall encourage delegates to reflect on their own competencies and consider how they can lead their groups with respect to their personal disposition, the resources available to them and managing this effectively in different scenarios. The Academy also invites Tenderers' suggestions of how ongoing learning and application of the course contents could be meaningfully facilitated for delegates beyond the course end.

- **Trainers and external speakers**

The Academy expects that trainers and speakers shall be drawn from a broad range of organisations, sectors, experiences and voices.

- **Networking**

Prospective Tenderers are invited to suggest how networking and community/cohort building will be facilitated especially during potential remote phases.

- **Accessibility**

Equality, diversity and inclusion are essential parts of the Academy's work and the Academy expects this to be reflected in the training programmes for its Research Fellows. The training provided should therefore be inclusive and accessible to all attendees, with consideration of personal needs and disabilities.

- **Frequency**

For Lot 1 and Lot 2 there will be two iterations, and one iteration for Lot 3, over the one-year the services agreement(s). This can be reviewed and revised according to demand.

- **Format**

The Academy expects that the majority of the courses are run in person with some online content if appropriate. Tenderers' submissions should outline options for all formats and include any costs associated.

The Academy expects groups of delegates to be around 20-30 per course.

In-person delivery shall be a two or three-day residential in course length for the Leadership in Research Programme (Lot 1) and ideally one day for the Introduction to Management and Leadership in Academic Research course (Lot 2).

Please note, the Academy shall be responsible for the logistics and costs of venue hire and catering, and any associated travel, catering and accommodation costs for fellows and trainers. Costs associated with travel and accommodation for training staff shall be covered in line with the Academy's travel and expenses policy.

- **Shaping the programme**

Course providers shall be required to deliver courses in a continuous improvement approach and as such shall collect and collate feedback on the quality and effectiveness of each module following each course. This information shall be shared with the Academy who will work with the course provider to improve and tailor the course.

Specific deliverables/outputs

	DELIVERABLE/OUTPUT	DELIVERABLE	TIMEFRAMES *
1	Programme design	Work with British Academy to design the programme/course.	To be completed by 30 January 2023
2	Programme consultations and user testing	Work with the British Academy and consult research fellows on course materials.	February 2023
3	Delegate registration and pre-programme communication (administration)	Work with the British Academy to communicate and promote courses. Registration will be initially managed by the Academy and handed over at the point of place confirmation.	February/March 2023
4	Programme delivery	Deliver training programme/courses on dates agreed in advance with the British Academy	Starting from March 2023
5	Programme feedback	Run delegate survey processes post each course to test delegate's satisfaction. Review data at end of a full round which may result in course material review and changes.	October 2023
6	Post programme review and updates	Work with British Academy to review feedback and reports on agreed timelines. Course material updates and reviews to be conducted based on reported requirements.	December 2023

**Subject to confirmation of the timeframes with the course providers*

1. Timeframe

The following sets out the tender timetable:

	TENDERING STAGE	DATES
1	Tender Open	Wednesday 16 November 2022
2	Tender Clarification Questions	By 10am Wednesday 30 November 2022
	British Academy final clarification responses issued	By 5 pm Wednesday 7 December 2022
3	Tender Closes	(5pm) Wednesday 14 December 2022
4	Evaluation and shortlisting of bids	15 December 2022 to 6 January 2023
	Confirmation of short-listing and offer of interviews	By 5pm Friday 6 January 2023
5	Presentation and interviews	Thursday 12 January 2023
6	Contract Award	By Wednesday 18 January 2023
7	Contract Start Date	Wednesday 25 January 2023
8	Kick off meeting	Tuesday 31 January 2023
9	Completion of Services/Project	Wednesday 13 December 2023

2. Criteria Questions

The following sets out the criteria to be used in assessing proposals received:

Criteria No.	Criteria Question	Weighting
Mandatory A	Have you demonstrable experience of delivering similar projects for delegates from an academic background within the last 3 years? Yes or No?	Pass/Fail
1	Understanding of the Requirements Demonstrate your understanding of the brief requirements and objectives and why you have chosen to tender for the Services and the specific Lots if not bidding for all three	10%
2	Relevant knowledge and experience a. Outline your organisation's background and experience in providing similar training services for academics b. Provide a brief statement of 2 recent and relevant examples of similar service provision. c. Demonstrate your organisations' specific knowledge and experiences of the sector, including: i. Understanding of the research funding landscape and the academic research community ii. Understanding of the challenges facing researchers in the humanities and social sciences making the transition to an independent research career and leadership role iii. Understanding of the British Academy's grant funding portfolio	20%
3	Methodology Detail how your organisation would propose to achieve the delivery of the services stated at item 3.4 of the Brief including: a. Proposed design framework of the programme/course, pedagogical approaches, duration, inclusion of innovative approaches or themes not outlined in this document b. Please include mock agendas and timelines as examples for both virtual and in-person courses c. Detailed timeline for delivery (including development phase) d. Outline your organisation's methodology in consideration of the audience, course format, subject matter, and application in the research sector	20%
4	Project Team a. Detail your proposed team for the Services including who will be responsible for delivering various elements throughout the course design, development and delivery timeline (e.g. project management, course design etc) b. Please detail the experience of the individuals proposed for the project team including provision of CVs.	20%

Criteria No.	Criteria Question	Weighting
5	Risk assessment and mitigation a. Please detail your organisation's assessment of possible risks and your suggested mitigations relating to the Services and evidence of contingency planning to ensure business continuity.	10%
Pricing Schedule	Pricing and demonstrating value for money by completing the template at Attachment 1 – Pricing Schedule	20%
Total		100%

Budget for agreement

The services agreement shall be offered to the successful tenderer/s for one-year.

The Academy advises Tenderers that the British Academy is a registered UK charity and the funds for this agreement are provided via Government grants funded by public funds. We therefore ask that you are mindful of restrictions we have and the obligation to acquit on all expenditure.

Please note the Academy shall award the Services to the Tenderer/s who offers the best value for money and quality of services.

Tenderers are asked to identify which Lot/s they are bidding for and provide their detailed proposed costs for the provision of the Service provision.

Any costs that are variable due to possible models offered to the Academy in tender submissions shall be identified clearly. Each Lot shall be priced separately to allow for distinct evaluation process of each Lot.