

The British Academy

INVITATION TO TENDER

External Evaluation of The British Academy Innovation Fellowship Schemes

1.0. About the British Academy

The British Academy, established by Royal Charter in 1902, is the UK's national academy for Social Sciences, Humanities and the Arts for People and the Economy (SHAPE). It represents the humanities and social sciences nationally and internationally; it organises wide-ranging programmes to support advanced research, disseminate research findings and promote policy engagement. As a Fellowship of over 1,400 UK humanities scholars and social scientists, elected for their distinction in research, the Academy is an independent and self-governing organisation, in receipt of public funding.

The British Academy is committed to making evidence-based decisions to maximise its impact and effectively champion the SHAPE disciplines. The Academy values monitoring and evaluation as an enabler for the successful delivery of its strategic priorities and to inform future planning of its programmes. The overarching aim of this independent evaluation is to strengthen the Academy's evidence and understanding of schemes at their baseline and early stages, facilitating the appropriate development of the counterfactual. As such, The Academy is tendering for a **baseline study** of Global Innovation Fellowships **and an early process evaluation** of the Innovation Fellowship schemes.

2.0. The British Academy Innovation Fellowships & Global Innovation Fellowships Schemes

Innovation Fellowship schemes provide funding and support to UK-based early and mid-career researchers in the Humanities and Social Sciences to partner with organisations and businesses in the creative and cultural, public, private, commercial or policy sectors, to address challenges that require innovative approaches and solutions. With the support of the Department for Innovation, Science and Technology (DSIT), the Academy supports researchers to develop new and deeper links beyond academia, enabling mobilisation and translations, as well as individual skills development. All awards are up to 12 months. To date, the schemes have funded over 100 awards.

2.1. Innovation Fellowships Routes A & B

Innovation Fellowships were launched in 2021 as a dual-route scheme offering SHAPE researchers the opportunity to partner with UK-based organisations through one of the following routes:

2.1.1. Innovation Fellowships Route A: Researcher-Led

In this route, researchers are expected to apply for the scheme with a partner organisation they have self-identified and commit between 0.4 and 0.8 FTE time to the fellowship. The Academy

awards a maximum of £120,000 on a Full Economic Costing (FEC) basis. There have been three funding rounds so far, [past awards](#) and [scheme notes](#) can be found on the Academy's website.

2.1.2. Innovation Fellowships Route B: Policy-Led

Route B of the scheme is policy-led. Applicants work with one of our named policy partners in the following strands:

- a. Foreign, Commonwealth & Development Office (FCDO, [scheme notes](#))

Up to £120,000 at 80% FEC is available, and fellows are expected to commit between 0.6 to 0.8 FTE time. In some cases, FCDO have provided additional funding to support the extension of some awards. There have been three funding rounds so far, [past awards](#) can be found on the Academy's website.

The Academy also awards up to £150,000 through three different public policy strands, paying up to £120,000 on an 80% FEC basis. Award-holders are expected to commit between 0.4 to 0.8 FTE time. The strands are:

- b. Local Policy Innovation Partnership (LPIP, [scheme notes](#))

This competition is in partnership with ESRC, AHRC, Innovate UK, UKRI and the Local Policy and Innovation Partnership Strategic Coordination Hub located at the University of Birmingham. [Past awards](#) can be found on the Academy's website.

- c. Central Government ([schemes notes](#))

Two cohorts have been funded under this competition so far, [past awards](#) can be found on the Academy's website. Fellows worked with policy partners including:

- The Cabinet Office
- His Majesty's Treasury (HMT) and the Department for Business and Trade (DBT) - joint hosts of the scheme
- The Department for Culture, Media and Sport (DCMS)

- d. Digital Society ([scheme notes](#))

The Academy partnered with Bridging Responsible AI Divides (BRAID) to co-fund this cohort of Fellowships. Unlike other Route-B: Policy-Led schemes, the Digital Society Fellowships for 2024-25 adopted a thematic approach whereby the research supported in this cohort aligned with one of the Academy's internal policy programmes. This approach has facilitated better integration of Innovation Fellowships into the Academy's policy work. For example, recent fellows participated in a roundtable with Skills England on AI Skills and its outcomes. In addition, the Academy has seen a significant increase in interest in the scheme. The Academy plans to adopt this thematic approach in future calls of Route B Fellowships.

[Current awards](#) can be found on the Academy's website.

2.2. Global Innovation Fellowships

Global Innovation Fellowships are new strands of the scheme that have been introduced from 2023 onwards. These programmes are part of the £337 million [International Science Partnership Fund](#), which is designed to enable potential and foster prosperity. It puts research and innovation

at the heart of the UK's international relationships, supporting UK researchers and innovators to work with peers around the world on the major themes of our time. Each programme offers one to two fellowships. The new schemes are expected to be awarded in March 2025, with successful applicants beginning in September 2025.

The British Academy launched the following nine programmes:

- i. Global Innovation Fellowships: Carnegie Endowment for International Peace ([scheme notes](#))
- ii. Global Innovation Fellowships: The German Council on Foreign Relations (DGAP) ([scheme notes](#))
- iii. ODA Global Innovation Fellowships ([scheme notes](#))
- iv. ODA Global Innovation Fellowships: C40 ([scheme notes](#))
- v. ODA Global Innovation Fellowships 2025 (Remote) ([scheme notes](#))
- vi. ODA Global Innovation Fellowships: The Igarape Institute ([scheme notes](#))
- vii. ODA Global Innovation Fellowships: Conciliation Resources ([scheme notes](#))
- viii. ODA Global Innovation Fellowships: International Crisis Group ([scheme notes](#))
- ix. ODA Global Innovation Fellowships: South African Institute of International Affairs (SAIIA) ([scheme notes](#))

3.0. Objectives of the schemes

The overall aims of the Innovation Fellowships schemes are to:

- Enable SHAPE researchers to develop their skills, networks and careers in the creative and cultural, public, private and policy sectors, to address challenges that require innovative approaches and solutions
- Foster mutually beneficial partnerships between the award holder and partner organisation, with each able to:
 - take advantage of fresh perspectives
 - expand their networks and reach
- To strengthen and create new links between academia and policy, and across various industries, enabling knowledge mobilisation and translation
- Provide the opportunity to develop new approaches and solutions to policy challenges through different perspectives, across economy, regions and society.

In addition to the overall objectives, each programme has its own objectives and requirements. For full details, please see the respective schemes notes.

4.0 Objectives of the evaluation

The objectives of the independent evaluation of the Innovation Fellowship schemes are to assess:

- (a) The current conditions, challenges and opportunities related to the scheme's objectives
- (b) The current research capabilities, skills and expertise of award-holders.
- (c) To collect baseline data to enable counterfactual estimation in the future.
- (d) To identify and collect key indicators to track progress towards desired outcomes.

- (e) The existing networks/connections and level of policy or equivalent engagement prior to the scheme.
- (f) Where possible, the known outcomes and impacts-in-progress of awards and on award-holders. It is acknowledged that many will be achieved in the future.
- (g) What can be learned from the application and delivery processes, from the perspective of:
 - a. Award holders
 - b. Partner organisations
 - c. Unsuccessful applicants
 - d. Programme delivery staff
- (h) The demand & accessibility of the schemes to applicants.
- (i) The schemes in comparison to other similar schemes in the UK's research funding landscape.
- (j) New or existing partner relationships formed or maintained.

Methodologies employed should be compliant with the HM Treasury Magenta Book.

It is expected that the evaluation objectives will be met through engagement with a range of stakeholders, including (but not limited to) award-holders, unsuccessful applicants, British Academy staff and partner organisations.

4.1 Proposed questions

The following questions are proposed; however, the appointed contractor will be invited to make contributions to the refinement or extension of these to meet the objectives of the evaluation:

Baseline:

- What are the existing trends, challenges and opportunities that may influence the effectiveness of schemes?
- What are the baseline levels of skills, capacity and readiness among applicants and partner organizations?
- What networks and past or present engagements do award holders have with policy and policymakers?
- What indicators and processes should be implemented to track the effectiveness and impact of the scheme over time, including the identification of short-, medium- and long-term outcomes?
- What are the baseline perceptions of key stakeholders regarding the scheme, including perceived potential for impact and relevance of the scheme?

Other questions:

- What are the views of the application and delivery processes? Are there any lessons that the Academy might consider in future calls?
- Who does the scheme attract? And what factors influence applicants' decision when choosing one of the available Innovation Fellowship funding routes?
- How, if at all, have broader socio-political and cultural contexts impacted implementation, uptake and engagement of the schemes to date?
- Have there been any barriers faced in establishing cross-sector partnerships and knowledge mobilisation? If so, how have they overcome these challenges?

- In what ways are fellows developing new approaches or solutions to challenges by integrating diverse perspectives across sectors?
 - Is the scheme contributing to the development of research capacity, skills and networks in participating researchers and partner organisations, and if so, in what ways?
 - How have fellows and partner organisations benefited from their collaboration, and what early signs suggest the partnership will be mutually beneficial long-term?
 - Have there been other benefits conferred by the schemes to date? E.g., leveraged funding, career development, wider dissemination of research, ongoing or continued partnerships.
 - What do fellows and partner organisations value in the scheme?
- How are Route B Fellows' contributions influencing early-stage policy discussions or decisions, and what signs are there for their work shaping policy outcomes?
 - In what ways do Route B Innovation Fellowships enhance the policy work conducted by the Academy?

4.2. Deliverables

- Interim report at the mid-point of evaluation delivery. This should include a draft introduction, context and methodology sections. A proposed structure for the final report and intended headings are expected, even if they are not populated.
- A final report no longer than 25 pages, with additional annexes allowed.
- An executive summary no longer than 2 pages.
- Data sets of evidence gathered.
- Case studies from Innovation Fellowships Route A and B with appropriate data sharing agreements.

5.0 Appointment process, budget, and timing

The Academy shall award the Services to the Tenderer who offers the best value for money and quality of services. Tenders should be submitted as a single Word document or PDF by email to ba_monitoringevaluation@thebritishacademy.ac.uk by 6pm, 9th March, 2025. The outline timing for deliverables is shown in Table 1, and the criteria against which tenders will be assessed is shown in Table 2. The budget available for this independent evaluation is up to £30,000 (including VAT).

Table 1. Outline Timeline for Tender and Service Provision

	Tendering Stage	Dates
1	Tender Open	30 th January, 2025
2	Tender Clarification Questions	By 12pm on 7 th February, 2025
	British Academy final clarification responses issued	By 5pm 13 th February, 2025
	Tender Closes	By 6pm on 9th March, 2025
3	Assessment and decision	10 th – 25 th March
4	Contract Award Notification	26 th March
5	Contract Start Date	27 th March
6	Kick off meeting	The week after notification (Arranged on award)
7	Interim Report	27 th June, 2025
8	Completion of Services/Project	5 th September, 2025

Table 2. Tender Assessment Criteria

Criteria No.	Criteria
1	Demonstrate your understanding of the requirements and objectives and why you have chosen to tender
2	Relevant knowledge and experience
	<ul style="list-style-type: none"> a. Outline your organisation’s background and experience in providing similar services b. Provide a brief statement of 2 recent and relevant examples of similar service provision c. Demonstrate your organisation’s specific knowledge and experience of the sector, including an understanding of: i), the research funding landscape and academic research community, ii) SHAPE, and iii) the British Academy’s funding portfolio
3	Methodology
	Detail how your organisation would propose to achieve the delivery of the services including: <ul style="list-style-type: none"> a. Proposed design framework of the programme, approaches, duration, inclusion of innovative approaches or themes not outlined in this document b. Detailed timeline for delivery

Criteria No.	Criteria
4	Project team
	<ul style="list-style-type: none"> a. Detail your proposed team for the Services including who will be responsible for delivering various elements throughout b. Please detail the experience of the individuals proposed for the project team including provision of CVs.
5	Risk assessment and mitigation
	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.
6	Pricing and demonstrating value for money

The services agreement shall be offered to the successful tenderer from April 2025 to September 2025 inclusive. The Academy advises potential suppliers 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.

The terms of payment will be 50% payable on commission and 50% on acceptance of a satisfactory final report accompanied by all other relevant documents and datasets.

6.0 Further information

For further information, or to submit tender clarifying questions [here](#), or via [the Academy's website](#).

Contact: Kanekwa Nzimba, Senior Monitoring and Evaluation Lead on ba_monitoringevaluation@thebritishacademy.ac.uk.