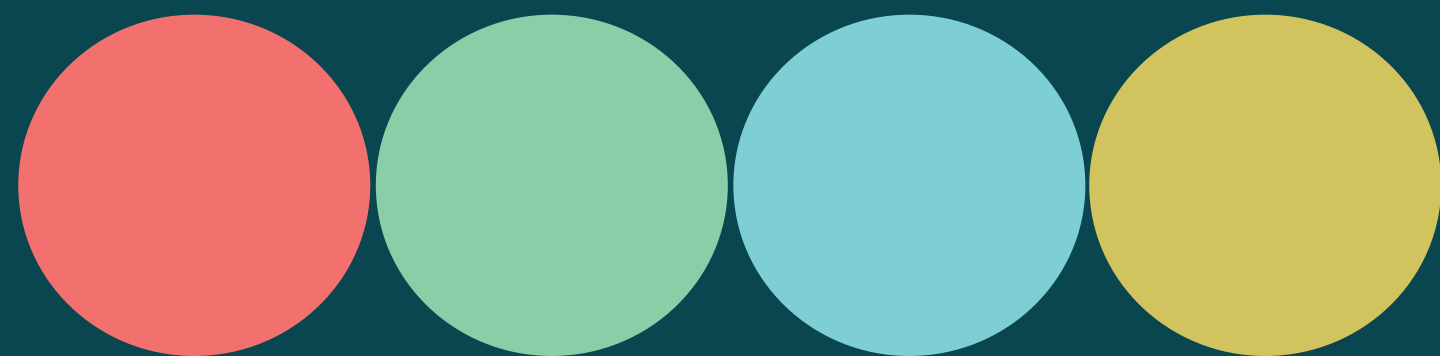




Budgeting for Wellbeing

Invitation to tender

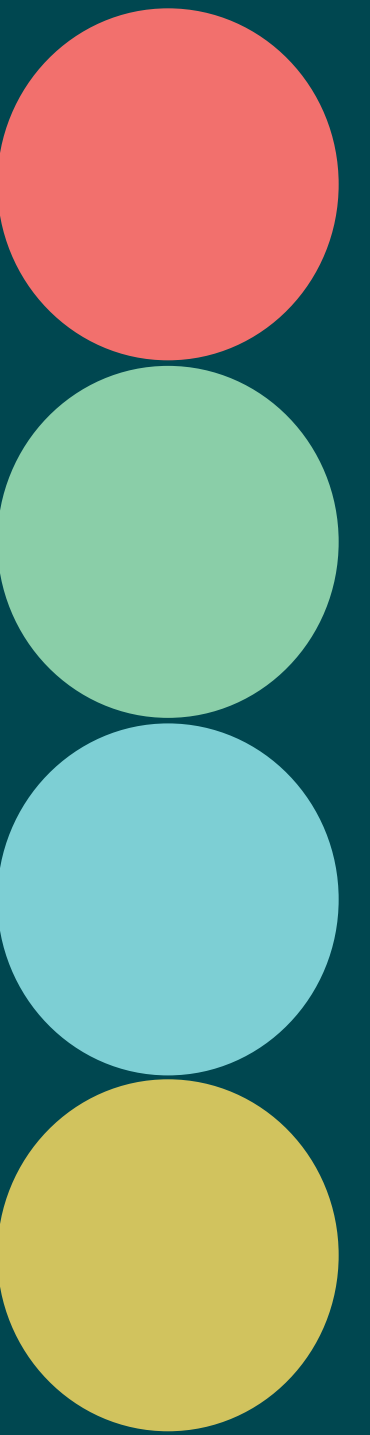
January 2025



Introduction

Carnegie UK are inviting competitive tenders for a research output on Budgeting For Wellbeing, through which we are exploring what a collective wellbeing approach to government revenue raising and spend could look like.

This is part of a larger programme and will help feed into our overall [Financing the Future](#) strand of work.



About us

Carnegie UK's purpose is better wellbeing for people in the UK and Ireland. We are a charitable foundation set up over 100 years ago, based in Dunfermline, Scotland and established with an endowment from the philanthropist Andrew Carnegie.

We aim to improve collective wellbeing by influencing public policy and practice.

We launched [our new strategy](#) in 2021.

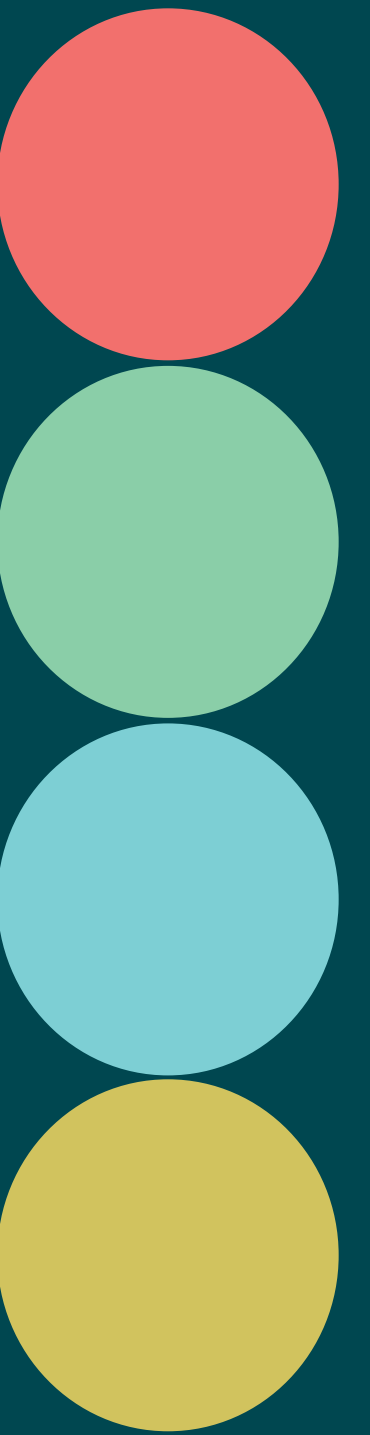
Our values shape our approach to all our work. It is important for us to be:

Motivated by change: we want to change people's lives for the better.

Challenging: social progress requires using research and evidence to speak truth to power.

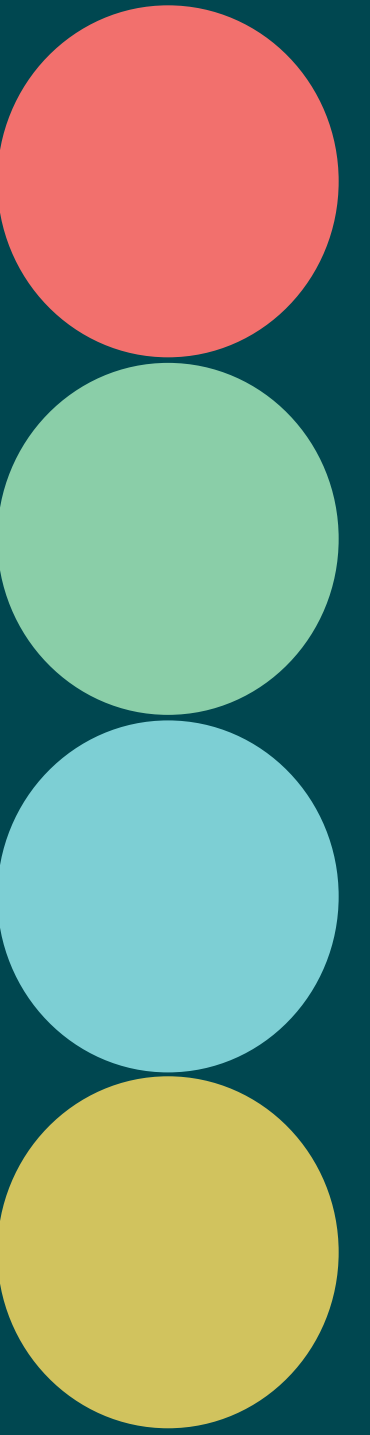
Collaborative: we will build coalitions to tackle injustice and change systems.

Kind: we will put strong relationships and kindness at the heart of everything we do.



The outcome we seek

Through this research we want to build our evidence and understanding of international approaches to budgeting for wellbeing, both for now and the future, what these look like and how their success is monitored and measured. Along with comparing approaches, best practice case studies would also be useful to bring the findings to life.

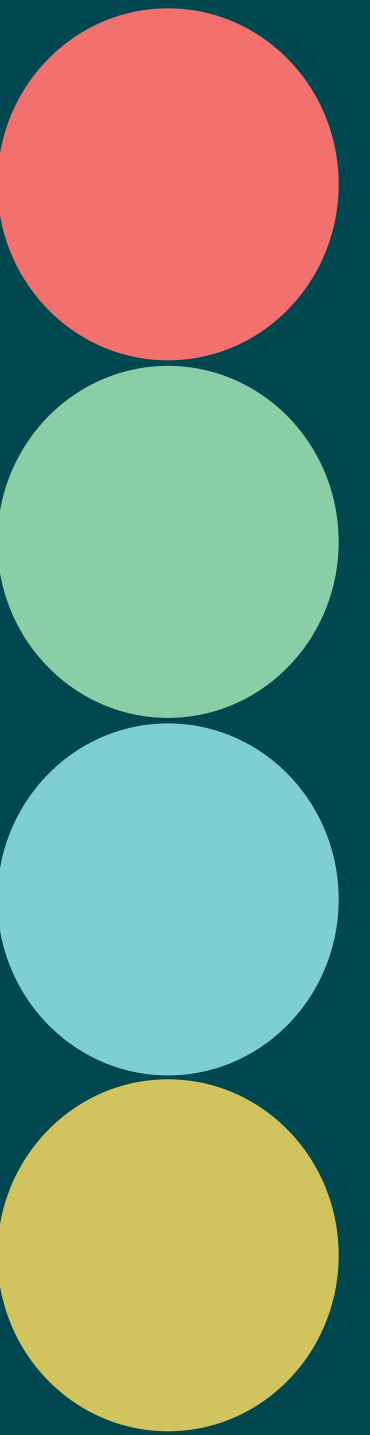


Where we seek insights

We are seeking research insight from examples of wellbeing budgeting approaches that have been taken and applied across the world, including what the impact was. This research could include activity at a national, state and/or local government level. Modules may include the following, however we are open to suggestions and keen to draw on the expertise and insights of the commissioned researcher regarding the final focus of the research:

- Outcome budgeting.
- Prevention Spend.
- Participatory budgeting.

Monitoring the assessment and impact of approaches to wellbeing budgeting should be a discrete section of all modules.

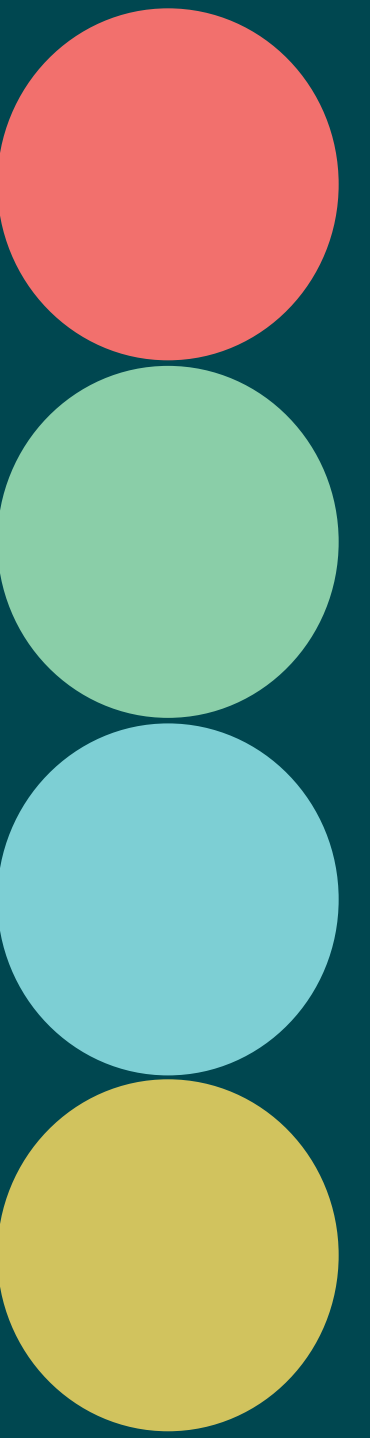


Outputs and outcomes

The output we seek is a full report of publishable standard along with a short executive summary to accompany it.

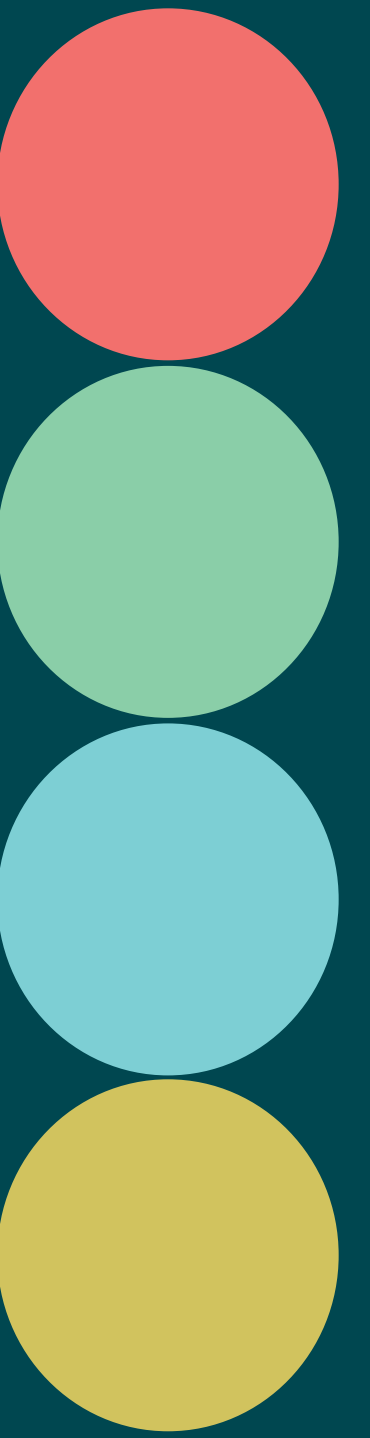
The outcomes we seek are to build our evidence and understanding of what international approaches to budgeting for wellbeing, both for now and the future, look like and how their success is monitored.

We want to have identified examples including countries, jurisdictions and states that have employed an approach to spend and budgeting that supports collective wellbeing (e.g. outcome budgeting/ prevention spend/ participatory budgeting), drawing together evidence on scope, approach and impact.



Key audience and stakeholders

The primary audience for the output from this pathway will be policy makers, including politicians and governments facing barriers to wellbeing budgeting in real time. Carnegie UK are also a primary audience. Likeminded organisations working for systems change, and peers in wellbeing spaces will be a secondary audience.

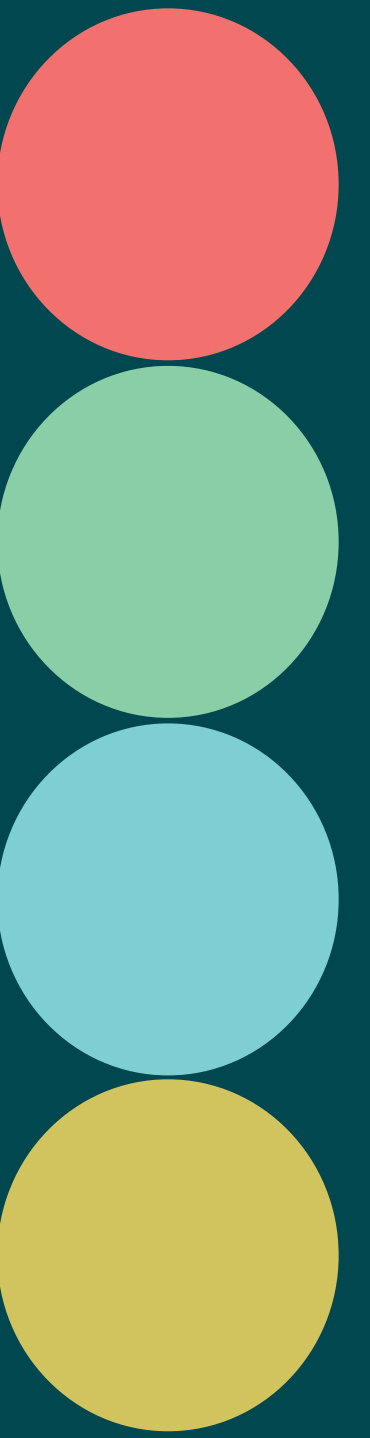


Methods

We would like the contractor to deliver a desk-based research output.

We would be pleased to hear from contractors regarding how they would both maximise information returns and quality of insights.

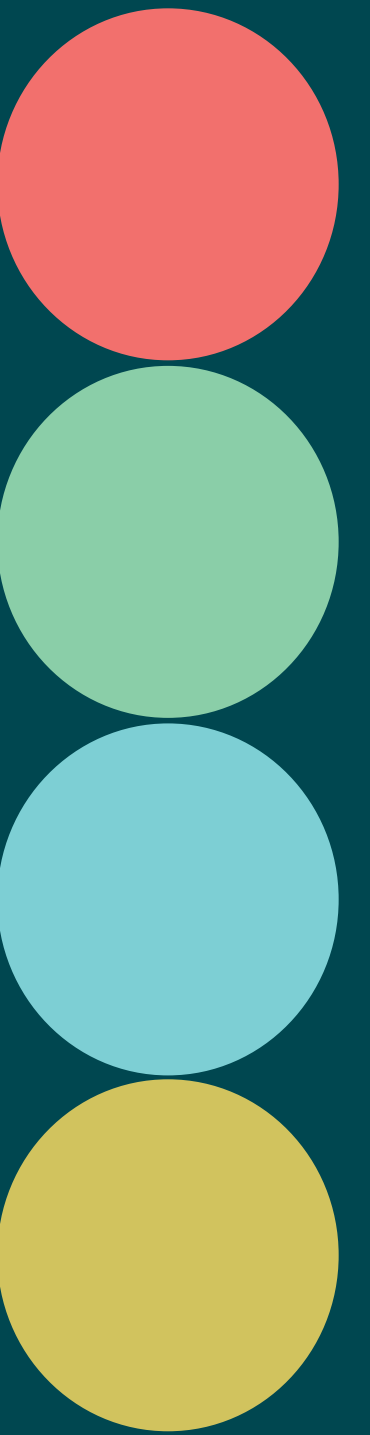
We would be pleased to hear from contractors about their experience delivering similar projects.



Approach, timescales and budget

Carnegie UK are looking for an organisation or individual that has the expertise and capacity to deliver this work for May 2025. We would be pleased to appoint a contractor before the end of February 2025.

Our budget is up to £18K+ VAT



Responding to the tender

The deadline for tender responses is **Sunday 09 February 2025 at 23:30**.

- Proposals of no longer than 5 pages should include:
- An outline on how you view the brief.
- A top line proposal of how you would take the brief forward, including methodologies.
- A proposed timeline for the project.
- A breakdown of how the budget may be allocated, including a demonstration of value for money.
- Evidence of alignment with our mission and values.
- A summary of your organisation's relevant experience, including a select number of case studies.

Submissions should be sent to our Financing the Future Programme Manager Jo McGilvray
joanna.mcgilvray@carnegieuk.org

If you have any questions on any aspects of this brief, please contact Jo on the email above in the first instance.

