



National Heart Foundation of Australia

ABN 98 008 419 761

Request for proposal (RFP):

Research & evaluation services

Champions4Change

20 July 2026

Date issued:	20 July 2026
Due date & time: (by electronic lodgement)	6 August 2026 By 5.00pm AEST/AEDT
All RFP communications, enquiries and responses to:	Senior Evaluation Lead, Sunet Jordaan (sunet.jordaan@heartfoundation.org.au)

Contents

Contents	2
1. Introduction.....	3
2. Organisational background	3
3. Context and evaluation need	4
4. Evaluation objectives	4
5. Scope of services and requirements.....	7
6. Instructions to vendors	10
7. Selection process	14
8. Project timeline.....	16
9. Vendor response templates	16

1. Introduction

The National Heart Foundation of Australia (**Heart Foundation**) is seeking proposals from suitably qualified organisations to deliver an independent evaluation of the Champions4Change (C4C) program. The purpose of this RFP is to engage a First Nations–led evaluator or evaluation team to design and deliver a culturally safe, independent evaluation of the Champions4Change program. This evaluation will build on existing internal monitoring and evaluation activities to generate deeper insights into program implementation, Champion experiences, community influence, and future measurement approaches.

Findings from this evaluation will inform program improvement, strengthen accountability to funding partners, and support future investment and sustainability of the program.

This RFP outlines the scope of services, expectations regarding methodology and deliverables, and the process for submission and selection.

1.1 What's important to us

In selecting a partner, the Heart Foundation is seeking:

- A First Nations–led organisation or evaluator, with demonstrated cultural engagement expertise
- Strong experience in evaluation in First Nations contexts, including culturally safe methodologies
- Experience applying relational, strengths-based and participatory approaches such as yarning, storytelling and community engagement
- Understanding of data sovereignty, ethical research, and HREC processes
- Ability to translate findings into clear, practical and actionable recommendations
- A collaborative, respectful approach to working with First Nations communities, Champions and other stakeholders

2. Organisational background

The Heart Foundation is dedicated to preventing heart disease and improving the heart health and quality of life of all people living in Australia through work in risk reduction, support and care and research. The Heart Foundation funds life-saving heart research and works to improve heart disease prevention and care for all people living in Australia. More than 580,000 people living in Australia live with heart disease; each year, approximately 375,000 people living in Australia suffer a heart attack.

It is a priority for the Heart Foundation to improve cardiovascular health outcomes for First Nation peoples, recognising the disproportionate burden of disease and the need for culturally safe, community-led approaches.

The Heart Foundation works in partnership with First Nations peoples, communities, Aboriginal Community Controlled Organisations (ACCHOs), and stakeholders to support self-determination, culturally safe care, and strengths-based health promotion.

Our work includes:

- Funding cardiovascular research
- Guiding health professionals in preventing and treating heart disease
- Educating people living in Australia about making healthy choices
- Supporting people living with heart conditions

- Advocating to government and industry to enact changes to improve heart health in Australia.

3. Context and evaluation need

3.1 Problem statement

Acute rheumatic fever (ARF) and rheumatic heart disease (RHD) disproportionately affect First Nations communities in Australia, with some of the highest prevalence rates globally.

The Champions4Change program was established in 2018 through RHD Australia to elevate lived experience and support community-led responses to prevention, awareness and advocacy. It transitioned to the Heart Foundation in 2023. Since this transition, the Heart Foundation's First Nations Heart Health team has focused on reconnecting with existing Champions, inducting new Champions, rebuilding program systems, strengthening relationships with communities and stakeholders, and ensuring the program continues to be delivered in ways that are culturally safe, respectful and responsive to Champion priorities.

Following program transition to the Heart Foundation and ongoing development, there is a need to:

- Understand how effectively the program is being implemented
- Assess cultural safety and appropriateness of the model
- Explore Champion experiences and outcomes
- Identify the program's contribution to awareness and system-level change
- Develop approaches for future culturally appropriate impact measurement

4. Evaluation objectives

4.1 Project objectives

The purpose of this evaluation is to guide how the Champions4Change program is monitored and evaluated across the current phase of implementation, while supporting ongoing program learning, accountability and sustainability. The evaluation is designed to determine if the Champions4Change program is clearly defined, implemented well, and that Champions are appropriately supported to participate, lead and contribute their lived experience in culturally safe and meaningful ways.

By collecting and reviewing data throughout implementation, the evaluation will inform continuous program improvement, identifying what is working well, where adjustments are required, and how the program can be strengthened over time. The evaluation will also provide a clear and credible evidence base to support sustained program funding, strong governance arrangements and the development of broader partnerships.

More specifically, the evaluation seeks to understand:

1. whether the program is being implemented in a culturally safe, appropriate and effective way;
2. whether Champions are being supported, and connected through their participation in the program;
3. whether the program is contributing to increased awareness, engagement and collaboration among stakeholders and communities; and

4. what practical and culturally appropriate approaches can be used to assess the influence of Champions' work in communities over time.

Taken together, the evaluation serves three purposes: formative learning and improvement, accountability and reporting to funding partners, and preparation for stronger long-term outcome and impact measurement as the program continues to evolve.

4.2 Evaluation scope

This evaluation will focus on Champions4Change program implementation up to December 2026, with an emphasis on understanding how the program is currently operating, how Champions are experiencing participation, and how implementation varies across different geographic and community contexts. The scope reflects where the program has been implemented for the longest period, where activity has been most sustained in recent months, and where meaningful learning can be generated within available time and budget.

Timeframe

The evaluation will assess program implementation and Champion experiences from program transition to the Heart Foundation through to December 2026. This timeframe captures the period of program stabilisation, renewed Champion engagement, and early activation of Phase 2 activities.

Geographic focus

The evaluation will prioritise locations where Champions4Change activity has been most established and active, specifically:

- Northern Territory, where the program has been implemented for the longest period and has had the highest level of activity over the past six months
- South Australia, where Champions have been actively engaged through online participation and program support

Within the Northern Territory, the evaluation will include a mix of remote, regional and metropolitan contexts to reflect the diversity of Champion experiences and community settings.

Champion cohort included

The evaluation will focus primarily on Tier 1 and Tier 2 Champions, reflecting the central role of lived experience in the program model. The proposed scope includes:

- Approximately 15 active Tier 1 and Tier 2 Champions
- At least 1–2 Champions from remote communities
- At least 5 Champions from regional and metropolitan areas

To strengthen understanding of engagement and sustainability, the evaluation may also include up to two inactive Champions to explore reasons for reduced or discontinued participation. Inclusion of inactive Champions will be subject to available budget and will be treated as a specific sub-question within the evaluation.

Suggested data collection approaches by location

Evaluation methods can be adapted to context to ensure cultural safety, accessibility and feasibility:

- East Arnhem (NT):
Face-to-face engagement is required due to language, cultural context and community preferences.
Community visits will be conducted with interpreters.
Focus on understanding awareness, engagement and interpretation of Champions' messages in a high-prevalence setting.

- Darwin (NT):
Combination of face-to-face engagement and community visits, with interpreters where required.
- Alice Springs & Tennant Creek (NT):
Champion engagement via Teams or Zoom, recognising practical constraints and Champion preference.
- South Australia Champions:
Engagement conducted online via Teams or Zoom.

Out of scope

Consistent with the program's current stage of implementation, the evaluation will not attempt to measure population-level or clinical outcomes, such as changes in ARF/RHD incidence or health service utilisation. The evaluation will instead focus on program implementation quality, Champion experience, perceived influence, and recommendations for future impact measurement.

Refinement of scope

This evaluation scope represents a proposed and pragmatic starting point. The final scope, sampling approach and data collection methods will be refined in consultation with the First Nations-led external evaluator, taking into account cultural considerations, evaluator expertise, feasibility, and available budget.

Motivation for scope selection

The scope has been intentionally designed to balance depth, cultural safety and feasibility. Focusing on the Northern Territory and South Australia allows the evaluation to learn from areas with the longest and most active implementation, while still capturing variation across remote, regional and metropolitan settings. Prioritising Tier 1 and Tier 2 Champions ensure that the evaluation centres lived experience, consistent with the program's values and intent.

Including a small number of inactive Champions, where feasible, will provide important insights into barriers to sustained participation and inform program strengthening. Tailoring engagement methods by location recognises the importance of culturally appropriate, relational approaches and avoids imposing one-size-fits-all evaluation methods.

Overall, this scope supports meaningful learning to inform program improvement, accountability to funders, and the design of future phases of Champions4Change.

4.3 Evaluation questions

1. How appropriate and culturally safe is the Champions4Change program model for engaging First Nations people with lived experience of ARF and RHD?
2. To what extent has the Champions4Change program been implemented as planned, including Champion recruitment, support, upskilling, workshops, community engagement activities, advocacy, and resource development?
3. How does participation in the Champions4Change program influence Champions' knowledge, confidence, leadership, connection, and ability to share their lived experience in community and stakeholder settings?
4. How has the Champions4Change program contributed to increased awareness and understanding of ARF and RHD among communities, health professionals and other stakeholders?
5. In what ways has the Champions4Change program contributed to advocacy, partnership development, collaboration and broader sector efforts to prevent ARF and RHD?
6. What culturally safe and cost-effective approaches could be used in future to measure the influence of Champions' work on communities, awareness and engagement related to ARF and RHD?

5. Scope of services and requirements

Respondents are invited to submit proposals that address the scope and requirements outlined below. The level of detail provided should be appropriate to the scale and complexity of the project.

5.1 Methodology and approach

The Champions4Change evaluation will use a mixed-method approach that combines routine program monitoring, internal evaluation activities conducted by the Heart Foundation team, and a First Nations-led external evaluation. This reflects the reality that the program already collects a range of implementation and outcome information, while also recognising the value of independent, culturally grounded evaluation to examine deeper questions of program quality, influence, and future measurement.

Routine monitoring will continue to document program reach and implementation progress. This includes information such as Champion numbers, activities delivered, workshop participation, advocacy engagements, stakeholder involvement, and resources developed or distributed. This data is already being used in donor reporting and internal program management. The external evaluator will build on this existing evidence base rather than duplicate it.

In addition to monitoring, the program is already undertaking internal evaluation activity. The strongest example is the Champions4Change workshop evaluation, which used culturally appropriate methods such as yarning circles, storytelling, and visual confidence-mapping to assess changes in Champions' knowledge and confidence. Internal evaluation activity also includes structured reflection on Champion experiences, review of stakeholder feedback on resources and activities, and documentation of implementation lessons.

We suggest the following data sources to answer the evaluation questions:

Evaluation question	Data sources
Cultural appropriateness and safety of the program model	Program overview documents; workshop evaluation; Champion feedback; reflections
Implementation as planned	Operating plans; donor reports; activity logs; workshop records, feedback from the Heart Foundation implementation team
Champion knowledge, confidence and leadership	Workshop evaluation summary; Champion feedback; examples from donor reports, key informant interviews, focus group discussions
Awareness and understanding among communities and stakeholders	Activity records; stakeholder feedback; donor reports; examples of reach and responses, key informant interviews, focus group discussions
Advocacy, partnerships and broader sector contribution	Records of advocacy activities, presentations, collaborations and requests for Champion involvement, key informant interviews, focus group discussions

Future culturally safe and cost-effective community impact measurement	Current templates, donor KPI requirements and practical lessons from existing data collection
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5.2 Ethics

The Champions4Change evaluation should be conducted in accordance with the Australian Evaluation Society (AES) First Nations Cultural Safety Framework (Gollan & Stacey, 2021). This Framework has been explicitly adopted to guide the design, implementation, interpretation and reporting of the evaluation, alongside the AES Code of Ethics and relevant human research ethics requirements. Its use reflects a commitment to First Nations leadership, cultural safety, ethical accountability and responsible evaluation practice in First Nations contexts.

Ethical clearance

The commissioned external evaluator should obtain ethical clearance from a registered Human Research Ethics Committee (HREC) prior to commencing any evaluation activities involving Champions or other participants. Evidence of HREC approval must be provided to the Heart Foundation before data collection begins. In addition, the evaluator should ensure that application for the evaluation is submitted to the Australian Institute of Aboriginal and Torres Strait Islander Studies Research Ethics Committee (<https://aiatsis.gov.au/research/ethical-research/research-ethics-committee>).

Where evaluation activities evolve over time, or where additional data collection methods are proposed, the evaluator is responsible for seeking amendments or additional approval as required.

Ethical principles:

The evaluator should abide by the Australian Evaluation Society (AES) First Nations Cultural Safety Framework (Gollan & Stacey, 2021) and plan and conduct the evaluation with the following in mind:

- First Nations leadership and expertise
- Culturally safe evaluation methods
- Voluntary participation and informed consent
- Respect for lived experience and wellbeing
- Confidentiality, anonymity and careful reporting
- Data sovereignty and intellectual and cultural property

5.3 Project management and delivery

The work plan below combines activities already completed, activities currently underway, and activities still required to complete the evaluation. Timelines are indicative and will be refined once the external evaluator is commissioned.

Deliverables	Activity	Timeline	Responsibility
Evaluation plan	Finalise and approve updated evaluation plan	2026	Heart Foundation evaluation team and program lead
Routine monitoring	Maintain activity logs, engagement records, resource tracking and donor reporting	Ongoing	Program team

Deliverables	Activity	Timeline	Responsibility
Workshop evaluation	Continue using culturally appropriate workshop evaluation approaches for major Champion workshops	Completed for 2025 workshop; ongoing for future workshops (1 – 2 September in Adelaide)	Program team or external evaluator if timelines allow
Internal reflection and learning	Document implementation lessons, operational reflections and stakeholder feedback	Ongoing	Program team
Internal data collection tool refinement	Review and refine internal tools such as activity check-ins, feedback approaches and workshop methods	2026	Program team
External evaluator procurement	Commission First Nations-led external evaluator	2026	Program lead with internal evaluation support
Inception and document review	External evaluator reviews program plans, donor agreements, progress reports, workshop evaluation and other existing evidence	At commencement of external evaluation	External evaluator
External data collection tool development	Develop discussion guides for yarning circles with key stakeholders	At commencement of external evaluation	External evaluator
HREC applications	Apply for ethical clearance from relevant bodies	At commencement of external evaluation	External evaluator
Champion consultations	Conduct yarning circles or interviews with Champions	During external evaluation	External evaluator
Stakeholder consultations	Conduct interviews with selected partners, health stakeholders and relevant internal staff	During external evaluation	External evaluator
Community impact measurement recommendations	Develop practical recommendations for future culturally safe and cost-effective community impact measurement	During external evaluation	External evaluator
Draft evaluation report	Prepare draft report with findings and recommendations	End of external evaluation period	External evaluator

Deliverables	Activity	Timeline	Responsibility
Final evaluation report	Finalise report following review and feedback	End of external evaluation period (by May 2027)	External evaluator

5.4 Reporting and deliverables

The Heart Foundation expect the following deliverables from the evaluator:

- Inception meeting after contracting
- Final project plan after inception meeting
- Progress updates via regular catch-up meetings
- Data collection tools
- Ethical clearance applications
- Draft and final reports with key findings and practical recommendations
- Recommendations for future community impact measurement approaches

Respondents should outline the format, level of detail, and intended audience for each deliverable.

5.5 Experience and capability

Respondents must demonstrate:

- Experience delivering First Nations-led or culturally safe evaluations
- Strong understanding of First Nations health contexts
- Capability in qualitative and participatory methodologies
- Experience preferable working with lived experience programs and communities

6. Instructions to vendors

6.1 Purpose of the RFP

This RFP aims to select a suitably qualified and experienced provider to deliver the research and/or evaluation services described in this document for the Heart Foundation's Champions4Change program. The engagement will support the Heart Foundation to generate evidence and insights to inform decision-making, program improvement, and stakeholder reporting.

Vendors are required to review this document in full and submit a response in accordance with the instructions and timelines outlined below.

This RFP may be issued on either an invite-only or open tender basis, as determined by the Heart Foundation.

6.2 Confidentiality

This RFP, including but not limited to any other documents released, the information provided or discussions held as part of the selection process are strictly confidential and must not be divulged to anyone who is not directly involved in the preparation of the response.

All information within this proposal or gained during the RFP or other processes will remain confidential.

No information or publicity will be allowed to any third party unless specific written authorisation is obtained from the Heart Foundation.

It is a condition of this RFP that the information provided herein is to allow Vendors to submit proposals to the Heart Foundation. It may not be used in any other context nor revealed to any other party not directly involved in the submission of a proposal in accordance with the terms of the specifications.

If at any time it becomes apparent that there has been a breach in confidentiality by a participant of this RFP relating to documents and any information, then the offending party will be immediately excluded from the RFP process. The offending party must immediately return all documentation to the Heart Foundation, and take any steps, as reasonably directed by the Heart Foundation, to remedy the breach.

6.3 Terms and conditions of the RFP

6.3.1 Closing date

The closing date for receipt of proposals is: 5:00pm AEST/AEDT on 31 July 2026.

Responses to the RFP shall be delivered to: Senior Evaluation Lead, Sunet Jordaan (sunet.jordaan@heartfoundation.org.au)

The proposal should be clearly labelled:

“Proposal for research and/or evaluation services – Heart Foundation Champions4Change”

6.3.2 Conditions

The Heart Foundation’s RFP document is structured to support consistent and fair evaluation of responses. Vendors should address all relevant sections of this RFP and complete the Vendor response template (Attachment 2) in accordance with the instructions provided.

The Heart Foundation’s management reserves the right to accept or decline late proposals at its absolute discretion.

The proposal should include the name of the person to whom the Senior evaluation Lead or their team may address any questions relating to the proposal.

Respondents should provide a complete copy of the proposal in an electronic format.

6.3.3 RFP questions and clarifications

Vendors should satisfy their interpretation of the RFP. If there is any perceived ambiguity or uncertainty in the RFP documents, vendors may seek clarification from the Senior Evaluation Lead before the end of the question-and-answer period.

Only the Senior Evaluation Lead may be contacted for supplementary information and clarifications relating to this RFP via the above contact details. All requests are to be emailed unless otherwise arranged.

The Heart Foundation reserves the right to issue any supplementary information requests made by vendors. Responses will be provided to all other vendors unless you expressly require it to be kept confidential at the time the request is made. If the Heart Foundation considers the contents of the request not to be confidential, it will inform the vendor and the vendor will have the opportunity to withdraw the request for supplementary information prior to the Heart Foundation responding to all other Vendors.

A Question-and-Answer period will commence from:

21 July 2026 and will close at 5:00pm on 27 July 2026.

Vendors shall aggregate their requests for clarification and submit them via email to the Senior Evaluation Lead, Sunet Jordaan (sunet.jordaan@heartfoundation.org.au).

Requests for clarification and the Heart Foundation's response will be supplied in writing (via email) to all parties expressing an interest in clarification. The source of the inquiry will not be disclosed. A consolidated clarification will be supplied on 28 July 2026.

6.3.4 Declaration of interest

Upon reviewing the RFP and agreeing to complete, the vendors will need to declare interest by sending an email with the proposal to the Senior Evaluation Lead, Sunet Jordaan (sunet.jordaan@heartfoundation.org.au) by 5:00pm AEST/AEDT on 6 August 2026 as per the timeline in Section 6.4.

6.3.5 Preparation of responses

Vendors are responsible for all costs associated with the preparation and submission of their proposal. The Heart Foundation is not bound to accept any proposal and may elect not to proceed with an appointment.

The requirements specified in this RFP reflect those presently known. The Heart Foundation reserves the right to vary, in detail, the final requirements.

All prices shall be in Australian Dollars, and all unit prices, charges and totals should be exclusive of GST.

The proposal must be accompanied by a cover letter signed by an individual authorised to bind the proposed entity.

6.3.6 Authorisation

The proposal should be signed by a person, or persons, duly authorised to bind the vendor to contracts. Proposals will remain firm and valid for 90 (ninety) days after the above due date.

All financial information submitted by the vendor will be used for evaluation purposes only and will be held in the strictest confidence.

6.3.7 Supplementary information

The Heart Foundation is only interested in receiving information that is pertinent to the RFP.

General information, which is not specifically requested, should be attached separately and clearly labelled "Supporting Material".

Marketing brochures included as part of the main body of the bid response shall not be considered. Such material must be submitted only as attachments and must not be used as a substitute for written responses. In case of any conflict between the content in the attachments and a Vendor's answers in the body of the proposal, the latter will prevail.

6.3.8 Service agreement & contract

The Heart Foundation's Master Services Agreement – General (MSA) is intended to form the basis for the agreement between the parties. If you have any areas of noncompliance with the MSA please document this in 'Attachment 2 Heart Foundation Champions4Change Response Template V1.0'. Amendments to the MSA will be considered, and the final form of the agreement will be dependent upon the results of negotiations between the parties based on the scope of the services to be provided.

NB: This RFP and responses to same may form part of the final agreements and terms of contract, accordingly, any representations made in submissions will be held to form part of those contracts unless specifically excluded.

6.4 RFP project timeline

The following timeline outlines the indicative stages of the RFP process. Dates are provided as a guide only and may be adjusted at the Heart Foundation's discretion. The Heart Foundation reserves the right to vary the timing, sequence, or scope of the RFP process as required. Respondents should not rely on the indicative dates as fixed milestones.

Milestone/Deliverable	Responsibility	Milestone Date
RFP issued	Heart Foundation	20 July 2026
Clarification period	Heart Foundation / Vendor	21 July – 27 July 2026
Consolidated clarification response	Heart Foundation	28 July 2026
Proposal submission	Vendor	6 August 2026
Initial assessment	Heart Foundation	6 – 12 August 2026
Optional clarification discussions	Heart Foundation	13 August 2026
Final assessment	Heart Foundation	14 August 2026
Reference checks (if required)	Heart Foundation	15 August 2026
Internal approvals (if required)	Heart Foundation	21 August 2026

Milestone/Deliverable	Responsibility	Milestone Date
Notification of outcome	Heart Foundation	24 August 2026
Contract finalisation	Heart Foundation / Vendor	4 September 2026

The Heart Foundation may elect to progress directly from evaluation to contract negotiation without conducting presentations or clarification discussions.

7. Selection process

7.1 Objectives

The objective of the evaluation process is to select a reliable and experienced provider with the capability to deliver the research and/or evaluation services required by the Heart Foundation within the specified timeframes.

Proposals will be assessed on their alignment with the project objectives, the suitability of the proposed methodology, relevant experience, and overall value for money.

7.2 Assessment process

The assessment process will comprise the following stages:

1. An initial review to confirm that submissions are complete and meet the requirements of this RFP
2. A detailed assessment of proposals against the evaluation criteria
3. Optional clarification meetings or presentations (if required)
4. Reference checks with previous clients (if required)

7.2.1 Preliminary examination

The evaluation panel will examine the proposals to determine whether they are complete, signed, and generally in order.

7.2.2 Detailed assessment

Proposals will be assessed based on their demonstrated understanding of the project context, the suitability and robustness of the proposed methodology, relevant experience, and the quality of proposed deliverables.

Consideration will also be given to the provider's ability to work collaboratively with the Heart Foundation and deliver the project within the proposed timeframe and budget.

7.2.3 Optional presentations or clarification meetings

At the Heart Foundation's discretion, shortlisted respondents may be invited to participate in a presentation or clarification meeting.

These sessions may be used to clarify aspects of the proposed approach, methodology, or experience and will not involve demonstrations of technical systems or platforms.

7.2.4 References

The vendor should provide details of two to four customers for reference. References should be for customers with objectives and requirements similar to those of the Heart Foundation. References should include detailed information about the contract. This should consist of e.g., specific projects or engagements, date of contract execution, the process involved, “project commencement” date and any services provided. In addition, Vendors should also include contact information for the client's project manager or other senior staff members familiar with the project. The Heart Foundation reserves the right to contact these references and discuss the client's level of satisfaction with the vendor and its services.

7.2.5 Contract negotiations

After completing the assessment phase of the process, the Heart Foundation will enter contractual and financial negotiations with no more than two vendors. The final selection will be based on the satisfactory outcome of these negotiations.

A contract will be awarded to a single vendor based on the evaluation of the RFP responses and the satisfactory outcome of financial negotiations.

7.2.6 Notification of outcome

After the contract has been awarded, the Heart Foundation will notify the unsuccessful vendors.

7.3 Contacts during the selection process

For all questions until completion of the selection process, the primary point of contact will be the Senior Evaluation Lead, Sunet Jordaan (sunet.jordaan@heartfoundation.org.au) unless otherwise organised.

7.4 Selection Criteria

The selection of a vendor will be based on responses to the items outlined in Attachment 2 and any optional clarification meeting/presentation (if held), which will be scored and weighted against the assessment criteria below:

#	Evaluation Criteria	Weighting
1	Strong research plan proposal, including methodology	20%
2	Innovative evaluation methodology included	10%
3	Ability to engage with and recruit diverse groups of health professionals and possible consumers (target audience)	10%
4	Ability to deliver on all outlined project deliverables	10%
5	Profile and credentials of the research team and/or organisation (including evidence of delivering similar evaluation)	10%
6	Ability to complete the project within timeframes and scope specified	10%
7	Ability to provide ongoing communication with Heart Foundation	10%
8	Value for money; alignment with budget	10%

9	Conflict of interest	10%
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7.5 Optional assessment process and due diligence

In addition to the above, the Heart Foundation may undertake the following process and due diligence in relation to shortlisted vendors. The findings will be considered in the evaluation process. Should the decision be made to undertake any of these, reasonable notice will be provided to the vendor.

- other checks against the vendor, e.g., ASIC
- additional interviews of vendors (if needed)
- requests for clarification
- additional financial information above the requirements set out in **Attachment 2 (Vendor response template) – Financial information section**

8. Project timeline

This section outlines the indicative timeframe for completion of the research and/or evaluation project.

The Heart Foundation anticipates that the evaluation will be completed by:

May 2027

Respondents should use this timeframe when developing their proposed methodology, resourcing, and delivery approach, and outline their proposed timeline in the Vendor Response Template (Attachment 2).

9. Vendor response templates

All information must be provided using the **Vendor response template (Attachment 2)**, along with any supporting documentation where appropriate. Responses should be clear, concise, and directly address the requirements outlined in this RFP.

9.1 Attachment 2 HF Champions4Change RFP Response template (Research & evaluation) V1.0 (Word)

The Vendor response template is structured to support consistent evaluation of proposals. Respondents are required to complete all relevant sections and provide sufficient detail to enable assessment against the evaluation criteria.

Responses should be written in plain English and be proportionate to the scope and complexity of the project. Lengthy academic or marketing material should be included as appendices only where directly relevant.



National Heart Foundation of Australia
ABN 98 008 419 761

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Champions4Change

Vendor response document

20 July 2026

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Contents

Contents	18
Section A – General requirements	19
1. Supplier profile	19
1.1 Vendor profile and demographics	19
1.2 References	21
1.3 Financial information	22
1.4 Insurance	22
1.5 Other information	23
Section B – Research & evaluation proposal	24
2. Proposed research & evaluation approach	24
2.1 Understanding of context and objectives	24
2.2 Proposed methodology and approach	24
2.3 Ethics and governance	24
2.4 Project management and delivery	24
2.5 Reporting and deliverables	25
2.6 Key personnel and capability	25
Section C – Cost considerations and pricing	25
3. Pricing	26
3.1 Pricing information	26
3.2 Cost of ownership	26

This is the vendor response template. Vendors should complete [Response] fields. This template is intended to be tailored for each engagement. Sections that are not relevant to the scope or risk of the project may be removed prior to issuing to vendors.

Section A – General requirements

10. Supplier profile

Answers within this section should be limited to a maximum of three paragraphs and should address every point as directly and factually as possible. Supplementary information may be attached to the proposal. Lengthy narratives should not be inserted into the body of a direct response.

Where a particular question or section is not applicable to the nature of the services proposed, vendors may indicate “Not applicable”.

10.1 Vendor profile and demographics

10.1.1 Company statement

[This should be kept brief and describe how the organisation is structured and how its people, expertise, and resources will be applied to meet the Heart Foundation’s research and/or evaluation requirements.]

Company Information	Detail
Company official name	[Response]
Type of entity (corporation, partnership or other)	[Response]
Company structure of respondent (independent, subsidiary, or part of broader organisation structure)	[Response]
Company address	[Response]
Authorised representative	
Authorised representative of vendor (name)	[Response]
Position within company	[Response]
Office address of authorised representative	[Response]
Telephone number	[Response]
History of relevant service provision	
Total number of years vendor has been in business offering and services	[Response]
Number of years vendor has been operating under present business name	[Response]

Number of years vendor has been delivering research and/or evaluation services relevant to this proposal	[Response]
Total number of employees (or consultants)	[Response]
Vendor growth profile	
Year when vendor was first established	[Response]
Location of vendor when first established	[Response]
Growth profile of vendor per year since inception in terms of locations and staff numbers	[Response]
If the vendor has been in operation for over five years, please provide a long-term summary and detailed information for the past five years.	[Response]

10.1.2 Description of vendor operations

[Include organisational structure, areas of expertise, and how the organisation supports delivery of research and/or evaluation services.]

[Response]

10.1.3 Corporate mission statement

[Include a brief statement outlining the organisation's mission and strategic direction, particularly as it relates to research, evaluation, public health, or social impact work. Where relevant, describe how this aligns with the Heart Foundation's purpose.]

[Response]

10.1.4 Merger and acquisition profile

[Include detail regarding any company that has merged with or been purchased by the Vendor]

[Response]

10.1.5 Alliance profile

[Include details of any strategic partnerships, alliances, or affiliations relevant to the delivery of research or evaluation services (e.g. academic institutions, specialist research partners).]

[Response]

10.1.6 Company statistics

[This includes geographic distribution, market share, reputation, company highlights including financials and manpower]

[Response]

10.1.7 Experience

['Experience' concerns the Vendor's experience delivering research or evaluation projects of a similar scope, complexity, and scale, including experience working with comparable organisations, programs, or populations. Please include information on the experience and continuity of key personnel.]

[Response]

10.2 References

The vendor should provide details of two to four clients for reference. References should relate to research or evaluation projects with objectives and requirements similar to those of the Heart Foundation. References should include information about the nature of the engagement, timeframe, scope of work, and outcomes delivered. The Heart Foundation reserves the right to contact these referees.

10.2.1 Reference one

Reference one	Detail
Company name	[Response]
Contact person	[Response]
Company address: Street City Postcode Country	[Response]
Number of employees at company	[Response]
Industry company operates in	[Response]
Summary of research or evaluation delivered	[Response]
Type of research or evaluation	[Response]
Date of delivery	[Response]
Participant group or stakeholder group	[Response]
Scale of engagement (e.g. number of participants, sites, or data sources)	[Response]

10.2.2 Reference two

(copy for References three and four)

Reference two	Detail
Company name	[Response]
Contact person	[Response]

Company address: Street City Postcode Country	[Response]
Number of employees at company	[Response]
Industry company operates in	[Response]
Summary of research or evaluation delivered	[Response]
Type of research or evaluation	[Response]
Date of delivery	[Response]
Participant group or stakeholder group	[Response]
Scale of engagement (e.g. number of participants, sites, or data sources)	[Response]

10.3 Financial information

Please provide a complete set of audited financial statements for the past three years. All financial statements should be prepared to generally accepted accounting principles. Vendors should note that the Heart Foundation reserves the right to purchase credit reports and additional financial information as it deems necessary. The vendor shall also provide a copy of its corporate annual report.

If the vendor is not a public company, it must provide financial statements that can be used during the evaluation to determine its financial viability.

Financial information	Detail
Audited financial statements for past 3 years	Attached: ☐
Corporate annual report	Attached: ☐
Is vendor currently in liquidation?	[Response]
Does the vendor have current or pending litigation?	[Response]
If yes to above, please provide details	[Response]

10.4 Insurance

Vendors are required to demonstrate the following insurance coverage and amounts:

Coverage	Amount	Detail
Public liability insurance	\$20,000,000	Attached: ☐
Professional indemnity insurance	\$20,000,000	Attached: ☐
Workers compensation insurance	As governed by legislation	Attached: ☐

10.5 Other information

[Please provide any other information you consider relevant to your proposal, including any known risks, limitations, or dependencies that may affect delivery of the research or evaluation.]

Section B – Research & evaluation proposal

This section sets out the information required to assess the Vendor's proposed research and/or evaluation approach. Responses should demonstrate a clear understanding of the project context, a fit-for-purpose methodology, and the capability to deliver high-quality, ethical, and actionable insights.

11. Proposed research & evaluation approach

11.1 Understanding of context and objectives

[Describe your understanding of the project context, including the program, initiative, or issue being examined. Outline how you interpret the evaluation objectives and how your approach responds to the Heart Foundation's needs.]

[Response]

11.2 Proposed methodology and approach

[Describe the proposed research and/or evaluation methodology, including:

- Overall evaluation or study design
- Data collection methods (e.g. qualitative, quantitative, mixed methods)
- Sampling or recruitment approach (if applicable)
- Data analysis methods
- Key assumptions, limitations, or risks associated with the approach

The methodology should be clearly aligned to the project objectives and proportionate to the scope and scale of the work.]

[Response]

11.3 Ethics and governance

[Describe any ethical considerations relevant to the project, including participant consent, confidentiality, and data privacy.

Where applicable, outline experience with Human Research Ethics Committee (HREC) applications and how ethical approval will be obtained and managed.

If ethical approval is not required, please state this clearly and explain why.]

[Response]

11.4 Project management and delivery

[Describe how the project will be managed and delivered, including:

- Proposed project phases and indicative milestones
- Roles and responsibilities of the project team
- Governance and quality assurance processes
- Risk identification and mitigation strategies

Please describe how you will work collaboratively with the Heart Foundation throughout the engagement and how you will monitor quality, timeline, and risks, including how you will ensure the success measures outlined in the RFP are achieved.

Respondents should also outline their proposed delivery timeline, aligned to the indicative evaluation timeframe specified in the RFP.]

[Response]

11.5 Reporting and deliverables

[Describe the proposed deliverables, which may include (but are not limited to):

- Progress updates
- Draft and final reports
- Presentations or briefings
- Data summaries or supporting materials (if applicable)

Please specify the format, level of detail, and intended audience for each deliverable.]

[Response]

11.6 Key personnel and capability

[Describe the proposed project team, including key personnel, their roles, and relevant experience delivering similar research or evaluation projects.

Please outline how the team's skills and experience align with the requirements of this project. In addition, describe the Vendor's broader organisational capability relevant to this engagement (e.g. systems, governance, specialist expertise, or internal quality assurance arrangements) beyond the individuals named.]

[Response]

Section C – Cost considerations and pricing

12. Pricing

[The Heart Foundation seeks value for money in the delivery of this research and/or evaluation project. This includes an appropriate balance of quality, scope, expertise, timeliness, and cost. Vendors should propose pricing that is transparent, proportionate, and aligned to the proposed approach.]

12.1 Pricing information

[When providing pricing, Vendors are required to provide:

- A clear breakdown of all costs, fees, and expenses associated with delivering the proposed research and/or evaluation services
- The total contract price, exclusive of GST
- Where pricing is based on fee rates, all applicable rates (e.g. daily or hourly)
- Any assumptions, exclusions, or dependencies that underpin the pricing

Vendors should consider all foreseeable risks, contingencies, and delivery requirements when preparing pricing information.]

12.2 Cost of ownership

[Based on the requirements outlined in the RFP documents, please itemise and describe the key cost components associated with delivering the proposed research and/or evaluation services. This should include professional fees, any anticipated expenses, and other relevant cost elements.

Please clearly distinguish between any upfront costs and ongoing or staged costs, where applicable.]

Element	Detail
Project establishment	Costs associated with project initiation, planning, and onboarding
Research delivery	Professional fees for data collection, analysis, and synthesis
Stakeholder engagement	Workshops, interviews, consultations, or facilitation activities (if applicable)
Reporting and outputs	Draft and final reports, presentations, or other agreed deliverables
Travel and expenses	Any anticipated travel or out-of-pocket expenses
Assumptions	Itemised assumptions underpinning the pricing

[Response]

[Attach documents if required]