



Ensuring Value in Research (EViR) Funders' Forum

EViR Strategic Workplan: Expanding Our Ambition

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Introduction

The Ensuring Value in Research Funders Forum

The Ensuring Value in Research Funders Forum (EViR) was established in 2016 as a funders' response to the [2014 Lancet series](#) about increasing value and reducing waste in research (Lancet Series Research: increasing value, reducing waste (2014)). Since then, EViR has brought together a range of health-related research funders and organisations that represent funders and/or influence health-related research funding policy, looking to establish itself on a global scale.

EViR aims to maximise the impact and benefit to society of health-related research by advancing research practices and funding. EViR offers an international community of shared practice and facilitated learning that is working to innovate, change practice and bring health improvement to all.

Consensus Statement and Guiding Principles

Forum members have developed and published a Consensus Statement and ten Guiding Principles, to which new members are expected to endorse.

The Ensuring Value in Research Consensus Statement:

As organisations that fund health-related research, represent funders, or set funding policy, we believe that we have a responsibility not just to seek to advance knowledge, but also to advance the practices of health-related research and research funding. Therefore, we commit to working together and with our respective research communities to share current and develop new approaches to increase the value of health-related research. We commit to transparency in this process, including evaluating our progress and the impact of our efforts. This will contribute to improvement in the health and lives of all people, everywhere.

Along with other relevant activities in the wider research landscape (e.g. the REWARD statement), we understand that as funders, we will maximise the value of the research we fund when:

- we set justifiable research priorities
- we require robust research design, conduct and analysis
- we seek to ensure that research regulation and management are proportionate to risks
- we seek to ensure that complete information on research methods and findings from studies is accessible and usable.
- we seek to ensure that findings from research are disseminated and implemented appropriately

Increasing value will require collaborative efforts among funders, regulators, commercial organisations, publishers, editors, researchers, research organisations, research users and others.

The Guiding Principles have been agreed as a framework to help members increase the value and maximise the impact, rigour, reliability, robustness and transparency of the research they fund. They guide both the collective endeavours of EViR and the activities of individual members, addressing five pillars that have been strongly influenced by the REWARD Alliance:

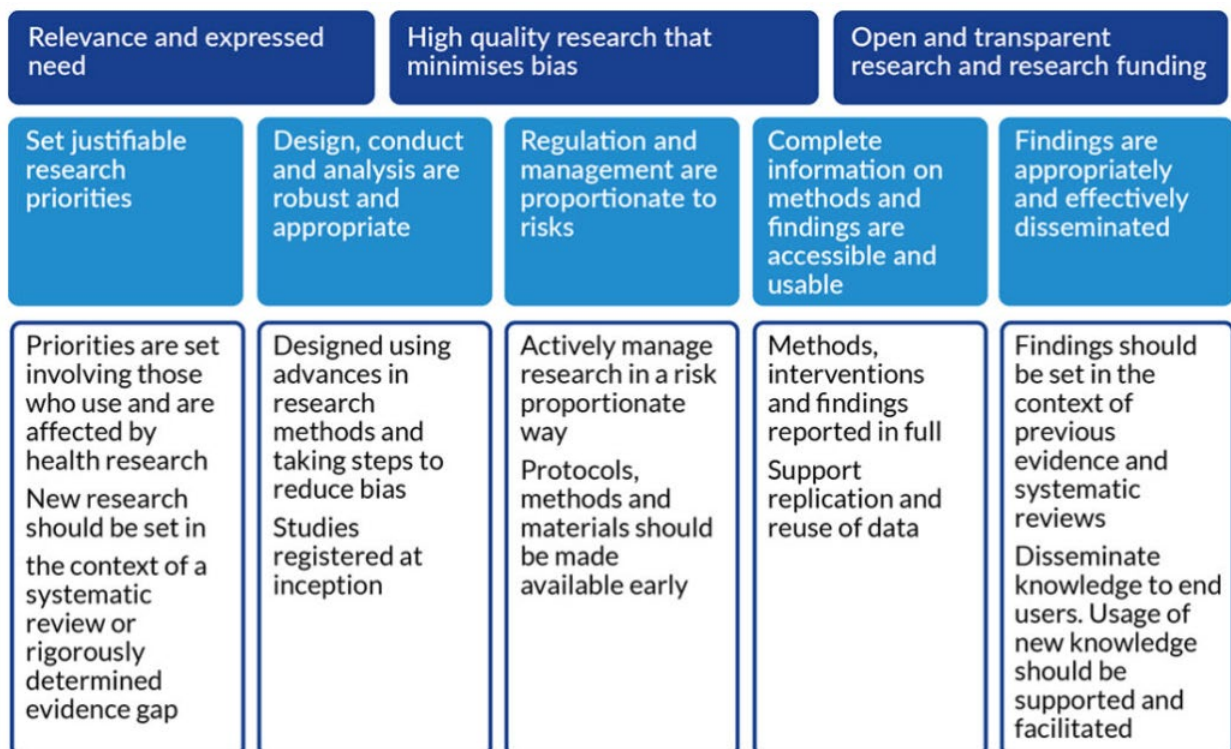
1. The “right” research priorities are set, involving those who use and are affected, including patients and clinicians;
2. The design, conduct and analysis of studies are appropriate by building on what is already known and use up to date methods to minimise bias;
3. Research regulation and management requirements are proportionate to risks;
4. All information on research methods and study findings are accessible and reports are usable;
5. Study findings are appropriately and effectively disseminated.

The ten Guiding Principles and conceptual approach of EViR are described succinctly in the figure below. (More detail is available on the EViR website: [Our principles - EViR](#))

It is recognised that the journey towards full realisation of the principles will be different for every organisation. What is considered to be good practice under any principle evolves, so this journey is ongoing for all organisations.

Ensuring Value in Research

Maximising the probability of benefits to society from health-related research for the tangible and intangible costs involved



www.evir.org

Figure 1. Summary of Funders’ Forum Guiding Principles

Key outputs and achievements to date

In addition to the development of the Consensus Statement and Guiding Principles, EViR activity has led to a range of further outputs and achievements. These include:

- Surveys and primary research relating to stakeholder engagement and funder dissemination and implementation practices.
- Conference presentations and journal publications.
- The creation of cross-funder working groups on topics of shared interest.
- A webinar series.
- A virtual international conference.
- The creation of a self-audit tool, enabling individual funders to assess their own practice and progress against the Guiding Principles.
- Generation of case studies illustrating member organisations' use of the Guiding Principles to effect practice change and impact.

The creation of the self-audit tool is a particularly notable achievement, as it helps funders to drive change that will improve the utility, safeguard and enhance the validity and reliability, and improve the dissemination, knowledge mobilisation and implementation of the research they fund.

EViR was nominated by Professor Sir Iain Chalmers for an Einstein Foundation Award for Promoting Quality in Research, demonstrating the esteem in which EViR is held and the view of Sir Iain and others that the development of EViR is “perhaps most notable and potentially influential development” in addressing avoidable waste in research (Glasziou and Chalmers, 2018).

EViR’s impact and uniqueness rely on the space provided for members to share, learn and collaborate with each other while contributing collectively to national and global developments in the field of health-related research funding. Members have produced a [Value Proposition](#) to set out the benefits to members and to new organisations looking to join.

Membership

The EViR Forum has grown rapidly and organically through the best-endeavours and co-leadership of the National Institute for Health and Care Research (England), the Patient-Centred Outcomes Research Institute (USA), the Netherlands Organisation for Health Research and Development (ZonMw, Netherlands), Health and Care Research Wales (Wales), the Health Research Board (Republic of Ireland) and FORTE (Sweden). This group of funders became known as the EViR Co-convenors.

It was recognised that to sustain an organisation of the breadth and ambition of EViR, which has engaged with 59 organisations worldwide and has an active international community of over 40 organisations, it would be necessary to move from a goodwill model to a subscription-based model, with all members sharing the cost. In 2019, the Co-convenors agreed to financially support the Forum for two years to allow time to introduce a new membership model.

The new subscription-based membership model was introduced in 2022, and offers two types of organisational membership:

- Full Members: health-related research funding organisations which have endorsed the consensus statement and Guiding Principles.
- Associate members: organisations representing funders or setting health-related research funding policies that support the Guiding Principles.

More information on membership is available on the EViR website: [Membership - EViR](#)

Subscriptions (from full members) and other contributions (from associate members) currently support a small secretariat, which administers the Forum on behalf of the members and is based at the School for Healthcare, Enterprise and Innovation at the University of Southampton (England). They are also used to meet the core costs of Steering Group meetings, roundtables, conferences, webinars and other events.

Our new work plan

The financial security that the new membership model provides makes it possible for EViR to develop a new strategic work plan that will drive and support activity in both core and new priority areas.

Priority areas have been discussed at successive EViR roundtable meetings, open to the full EViR membership, and various topics have emerged. In order to maximise the effectiveness of EViR activity, this strategic plan focuses on selected topics, agreed by all to be important areas for development over the next 3 to 5 years.

The priority areas identified for inclusion in this work plan are:

- Review and evolution of the **EViR Guiding Principles**.
- Using and developing the **Research on Research** evidence-base to inform and improve funding practice.
- Ensuring meaningful and consistent **equality diversity and inclusion (EDI)**.
- Ensuring **sustainability** of research funding practice.
- Extending our reach to **low- and middle-income countries (LMIC)**.
- Expanding our **membership** within an inclusive and robust **governance** structure.
- Maximising our **communication and engagement** opportunities.

The [Guiding Principles](#) are, in many ways, our bread and butter. In spanning the entire research funding process and providing a framework for individual and collective action, the Guiding Principles are what bring us together as funders sharing a common goal. It is right, therefore, that we not only continue to give them centre stage and monitor our progress against them, but that we keep them under continual review making sure that they remain fit for purpose and reflect any shifts or changes in the research funding environment.

It has been an unusual time for all over the COVID-19 pandemic period, and an interesting time for research. On the one hand, the pandemic has raised the profile of health-related research to unprecedented levels and, in the public mind, shown the value of research to health and wellbeing. On the other hand, the need for speedy, co-ordinated action in response to a global health emergency has thrown many assumptions about the research funding process into the air. As an international funders group, we are in a position not only to learn from what happened

during the pandemic but to decide how to respond and use what we've learned to adapt our principles and improve our practice.

There has been increased awareness recently of the growth of **Research on Research** and, as a forum, we are moving towards understanding how research on research can inform our practice, and the evolution of both our Guiding Principles and their implementation.

In recent times, the research funding landscape has changed in other ways. The pandemic shone a light on a range of societal issues relating to **equality, diversity and inclusion (EDI)**, contributing to an already growing awareness of the significance of EDI issues to health-related research. As research funders, it is important that the work we fund addresses the needs of all in society and is not skewed unfairly towards particular groups or conditions. Similarly, it is important that our own processes are inclusive and facilitate the appropriate involvement and representation of those we seek to serve. EViR members can learn from each other as we continue to shine a spotlight on equality, diversity and inclusion issues and work to embed them in our principles and practices.

We have also become more aware of the importance of research funding practice playing its part and evolving to reflect **sustainability** issues and responsible research funding. While the current workplan focuses on activities relevant to environmental sustainability, the discussion may expand to explore issues related to social and economic sustainability.

In relation to health and care research, the pandemic showed clearly how similar the fundamental health and care needs are of people across the globe, and, indeed, how interconnected we all are. There can be no clearer nor more powerful example to demonstrate the extent to which health-related research, informed by human need, is, and increasingly needs to be, a truly global effort. It should come as no surprise, then, that as a group of research funders committed to maximising the value of the research we fund, we have identified the extension of our work to **low- and middle-income countries (LMIC)** as one of our priorities.

While the membership model provides stability for EViR to develop a longer-term work plan, that stability cannot be taken for granted, particularly in the current financial climate. Therefore, we must continue to consolidate and grow the EViR **membership** along with fair and transparent **governance** processes to ensure good representation and a strong member voice within and across all EViR activities. It is important that the benefits of membership are clear and tangible and that the outputs and real-world impact of EViR activity are captured and publicised. It is crucial, therefore, that an appropriate and effective **communication and engagement** programme is included as part of this strategic plan.

1. Review and evolution of the Guiding Principles

Why is it important?

The [Guiding Principles](#) are at the core of the EViR Funders Forum. They drive what we do and provide a framework for both collective and individual action as we work to increase the quality and maximise the impact of the research we fund.

Most of what we have achieved as a Forum to date has been inspired by, and fallen under, the Guiding Principles. For example, the primary research we have undertaken has been carried out specifically in relation to Guiding Principles 1 and 10. Working Groups were created to guide this work and broader consideration and exploration of actions required under Guiding Principles 1 and 10, with a further Working Group focused on applying the Guiding Principles to pre-clinical research. The EViR Self-Audit Tool spans all 10 Guiding Principles, encouraging funders to assess current practice against the Guiding Principles and develop improvement plans.

The Guiding Principles are designed to span the entire spectrum of issues relevant to health-related research funding, from agenda setting with end-users and those affected by the research, through processes ensuring the robustness, reliability, transparency and management of research, to the publication, dissemination, mobilisation and implementation of research findings.

EViR members are asked to commit to the Guiding Principles as a condition of membership, working to apply the Guiding Principles within their funding organisations and within EViR.

Given the centrality of the Guiding Principles to EViR activity, it is important to ensure that they remain fit for purpose and evolve to reflect and incorporate changes in the broader health and care research funding environment. It is essential that they maintain their relevance and place at the heart of EViR, and that members have a shared understanding of the meaning and value of each principle in relation to EViR's end goal – namely, to maximise the impact of the research we fund, with all that that entails.

Present situation

EViR has produced several publications that give prominence to the Guiding Principles at the heart of EViR activity. The Guiding Principles feature strongly on the EViR website and in the terms and conditions of membership.

The Working Groups created in relation to dissemination and implementation, and pre-clinical research remain active. The Pre-clinical Working Group is undertaking survey-based primary research, which should lead to conference presentations and publications. The Dissemination and Implementation (D&I) Working Group, having undertaken and published survey-based primary research, presented a poster at the 2020 Equator Conference and presented and held a panel session at the 2021 European Implementation Event. It has also created a broader D&I Interest Group with a mailing list of over 100 names, drawing a broader range of individuals and funders into one of the areas of activity that continues to inspire the most interest among research funders and EViR members.

The Stakeholder Engagement Working Group is in abeyance, having produced and published work on health-research funder practice, but interest in Guiding Principle 1 remains strong, and is likely to be given a new lease of life by current focus on equality, diversity and inclusion, and

growing awareness of the need for consistent stakeholder engagement and involvement *throughout* the research process.

The EViR Self-Audit Tool has been piloted and further developed. It has been used by several funders and is ready for more widespread use.

Strong links have been made with other groups, including ESSENCE, the Cochrane Collaboration and the Research on Research Institute, that can inform further thinking and activity in relation to the Guiding Principles.

It is a strength of the EViR Forum that the Guiding Principles provide a focal point and a structure for discussion, action and change across the entire spectrum of research funding practice. However, it has also been noted that new topics raised by members as areas of interest or concern, for discussion and possible collaborative activity, do not always neatly fit into the wording of the Guiding Principles as they are currently framed. This includes topics like automation, sustainability, equality, diversity and inclusion, impact and implementation.

The review and evolution of the Guiding Principles present an opportunity to make sure that the framing of the principles does, indeed, take into account new thinking and new issues as the health-related research landscape evolves. The risk is that if EViR does not evolve, it will become less useful to members, and less authoritative and less respected as a voice in the field. The EViR Self-Audit Tool should correspond with the Guiding Principles and should, therefore, also be reviewed and updated. To date, the self-audits undertaken by members have mostly yielded descriptions and examples of practices across the various Guiding Principles. Possibilities for the quantification and eventual benchmarking and evaluation of effectiveness can be determined and operationalised as part of evolution and review.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- Review and evolution of the Guiding Principles to ensure that they remain fit for purpose and reflect and drive developments in the research funding process, in particular taking account of:
 - Equality, diversity and inclusion;
 - Sustainability;
 - Speed and efficiency.
- Evaluation of the effectiveness and impact of the Guiding Principles.
- Recognition and adoption of the Self-Audit Tool by all members, with benefits of use captured and communicated.
- Clearly articulated links between the Guiding Principles and all areas of EViR activity, especially the Research on Research Agenda, which has the potential to ground research funding practice in a strong evidence-based.

Pathways to achieve goals

To help achieve these goals, we will:

- Create a Working Group to lead on, and maintain oversight of, the review and evolution of the Guiding Principles and refinement of the Self-Audit Tool. The Working Group will look to assess the Guiding Principles through a fresh lens to ensure that they cover the breadth of health-related research, have global reach and avoid duplication with between EViR and other organisations.
- Ensure the working group collaborates with the EViR working groups on Equality, Diversity and Inclusion and Sustainability to ensure their perspectives are captured.
- Appoint leads and co-leads to prioritised topics to ensure the active engagement of relevant organisations and individuals across members organisations, devising and implementing outcome-based work plans where appropriate.
- Draw the full membership into discussions of the Guiding Principles in roundtable discussions to determine possible actions and EViR priorities.
- Continue to collect and share examples of member practice across all Guiding Principles, publishing examples of good practice on the EViR website.
- Conduct analyses of practice across funders and, where possible and where it adds value, publish analyses as a contribution to the research funding practice literature.
- Seek opportunities to work collaboratively to advance research funding practice.
- Engage expertise from across member organisations on specific topics to enhance the quality of EViR activity and potential for collaboration.
- Create e-learning opportunities in relation to the Guiding Principles and Self-Audit Tool, and make these available to members and the broader research funder community.
- Support the continuation of the current GP1, GP10 and preclinical working groups.

Outcomes

The outcomes expected from these activities are:

- Reviewed, revised and updated version of Guiding Principles and EViR Self Audit Tool.
- Stronger representation of people from across the membership in core EViR activity.
- A library of knowledge and good practice examples, accessible to all within membership organisations published on the EViR website.
- Established e-learning opportunities available to a broad audience.
- An enhanced reputation and footprint for EViR as a major force in the development of effective, evidence-based research funding practice.

2. Research on Research

Why is it important?

The recent growth in the profile of **Research on Research** (RoR) and its potential for informing research funding practice makes it both a topical and a priority area for EViR. RoR offers the potential for a greater understanding of our own practices as funders and their consequences. It further offers the possibility of grounding our practices in an evidence-base informed by the scientific approach to knowledge that we fund and support. It has the potential to show both what works in research funding practice and what does not work, and it can stimulate ideas and hypotheses about how we might do things better.

Present situation

As a forum, we are moving towards understanding how RoR can inform our research funding practice. However, as individual funders, i) we are at different stages of understanding what RoR can deliver for us; and ii) we vary in resources and remits when it comes to supporting RoR activity.

While there is growing global recognition of the importance of RoR, and specialist organisations have been established, it is still early days. Funders and institutions have been largely working on their own, and it takes a long time to change culture. In relation to research funding practice, the EViR Forum has the potential to bring funders together to identify and prioritise the challenges and questions that RoR can most usefully address, and can facilitate cross-funder learning, sharing and collaboration.

Opportunities for collaboration exist, especially with the possibility of specialist RoR organisations becoming Associate Members within EViR. The timing is right to develop a work programme in this area that will inform the framing and implementation of the EViR Guiding Principles, ensuring that our practices are, where appropriate, evidence-based, and informing action at both an individual funder and collective level.

Discussions we have had at roundtable meetings and webinars suggest that there is a wide range of issues on which funders are uncertain, and that there is value in developing an EViR RoR agenda with a prioritised list of topics where research on research may help. Engagement with specialist organisations like the Research on Research Institute and the Research on Research Registry will support this activity, and as a forum, we may also look to identify and engage in collaborative action that will answer our questions and address issues of general importance to the EViR membership.

While we should not underestimate the challenges here, not least those posed by limited resources for projects informing research funding practice, and the difficulties of collaborative funding or commissioning across national boundaries, are not insurmountable. It would be a missed opportunity not to develop EViR workplans and seek to influence and improve research funding practice. The key questions are: What does the evidence show in relation to research funding practice and the EViR Guiding Principles? What are the gaps and unanswered questions in relation to research funding practice that RoR can help us address? What kind of collaboration is needed across EViR members to help develop and advance the EViR RoR agenda?

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- **Phase 1 – build an EViR RoR workplan, taking into account:**
 - the current state of the evidence-based in relation to the EViR Guiding Principles and current funder practice;
 - identified evidence gaps;
 - unanswered questions of interest to the EViR membership;
 - prioritisation of need among the identified evidence gaps and unanswered questions;
 - developments in the RoR landscape;
 - possibilities of engagement with specialist RoR organisations
- **Phase 2 – implement the EViR RoR workplan, taking into account:**
 - priorities determined by the EViR membership;
 - the kind of collaboration that is necessary and possible;
 - the availability of resources and (if necessary) ways of generating further resources to support collaboration and RoR activity;
 - engagement and collaboration with specialist RoR organisations (for example through webinars, direct meetings, and EViR roundtables);
 - the barriers in research culture hindering change.

Pathways to achieve goals

To help achieve these goals, we will:

- Map current activity (noting where there is significant activity in this space already underway, such as the UKRI open research festival).
- Ensure we engage appropriately with relevant organisations and RoR experts (such as the Research on Research Institute and Research on Research Registry)
- Map and understand where current evidence supports the Guiding Principles and research funding practice and where the gaps and needs are.
- Create a timebound EViR RoR working group drawing appropriate engagement and participation from across the EViR membership. Undertake a prioritisation exercise across the EViR membership to identify and prioritise the top RoR questions for the EViR forum.
- Develop an RoR work plan focused on addressing the identified evidence gaps.
- Explore feasible forms of collaboration and build collaborative activity into the EViR RoR work plan.
- Review progress and state of evidence-based at regular intervals.

Outcomes

The outcomes expected from these activities are:

- An awareness among funders of the state of the RoR evidence-based as it applies to research funding practice and a clearer understanding of needs and uncertainties.
- Awareness and creation of evidence that supports and strengthens the EViR Guiding Principles. Stronger collective endeavour in creating an evidence-based for grounding EViR member research funding practices
- New forms of collaborative activity that help drive quality in research funding practice.
- Reputational enhancement of the EViR Funders' Forum and its members as leaders in establishing good evidence-based research funding practice.

3. Equality, Diversity and Inclusion (EDI)

Why is it important?

Equality, Diversity and Inclusion (EDI) is recognised as a global issue in health and care research. Evidence points to underserved and deprived populations being less able to realise the benefits of research and experiencing worse health outcomes as a consequence.

As an international funders' forum, EViR should be committed to supporting and promoting equality, diversity and inclusion in all aspects of health and care research, ensuring that all groups within our communities are appropriately represented and served regardless of ethnicity, geography, socio-economic status, age, disability, sex, gender or belief. The potential benefits of health and care-related research cannot be maximised and achieved unless EDI is appropriately embedded within funder practices.

Even for us as funders of health and care research, EDI is not one thing, but is a multi-faceted topic, requiring awareness and response to different issues. These issues include:

- Under-representation of topics and research questions relevant to minority or under-served groups in the research portfolios of funders;
- Under-representation in our own practices as funders, for example, on research prioritisation and funding committees, in our governance processes (such as advisory boards), and the inclusion of people with lived experience within peer review and funding board assessment processes;
- Under-representation as participants in research, in recruitment samples and strategies; and
- Broader issues of under-representation within the research workforce at different levels (a form of under-representation which requires collaborative action across a range of organisations beyond research funders, such as universities and government agencies).

Action on all fronts, a systematic and system-based approach, is required, though it is recognised that research funders have more control over actions in some areas than others.

Consideration of equality, diversity and inclusion is relevant and important across all of the EViR Guiding Principles. Nevertheless, it is important to shine a spotlight on EDI as a priority issue, even as we work to help funders embed it across their own practice.

Properly embedded EDI and due representation of all elements of our communities in all elements of research funding practice will improve the quality, robustness, relevance and impact of the work we fund and has the potential to reduce health gaps both within and across nations.

Present situation

While some research funders are taking action in relation to EDI, it is not clear to what extent this is the case and has traction across the global landscape. The National Institutes of Health (NIH) in the USA is thought to be advanced in its thinking and action on EDI. The UK is moving forward in this space, with the National Institute for Health and Care Research (NIHR-England) having published an [Equality, Diversity and Inclusion Strategy](#). But while it is likely that other international funders are working to prioritise and act, it is also likely that funders are working at a different pace, and with a different focus, depending on capacity, resources, know-how and

their local population needs and issues. There are likely to be local and country specific challenges, and even within nations, some funders may need more support with their thinking and capacity to move forward than others.

Although EDI has been recognised as a global issue, thus far there has been limited global collaboration in this space, as far as we can tell. However, there is also enormous funder interest in this area, and the scope and potential for learning are vast. There would be real benefit in funders gaining an understanding of the experience of others, and in reaching a shared understanding of what works in terms of enhancing and increasing representation and inclusion across different groups and populations. Similarly, there will be strong funder interest in understanding which approaches are generalisable across national borders.

It follows that there are a number of ways in which EViR can add value:

- The Forum can bring funders together to learn from each other and share best practice, especially in relation to representation within research prioritisation and funding processes.
- Funders can work together to develop a shared approach to the collection and use of EDI monitoring data and develop a robust evidence-base for equality, diversity and inclusion action.
- EViR can facilitate collaboration in a way that aligns funder approaches and, where possible, seek standardisation of approach to avoid duplication, unnecessary re-invention and confusion.
- Cross-funder collaboration can make a positive contribution to supporting both the impact and sustainability of funder practice concerning EDI.
- In relation to improving representation within the broader research workforce, funders will have more power and influence when coming together.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- To explicitly acknowledge EDI within a revised EViR Consensus Statement.
- Establish a new Guiding Principle, or separate EViR position statement, in relation to EDI (spotlight approach).
- To have a better understanding of EDI activity and terminology across a range of international funders and communities.
- To have a better understanding of the needs and characteristics of currently under-served groups and populations.
- To establish what good looks like in relation to embedded EDI practice across a range of vulnerable and currently under-represented groups.
- Be able to actively demonstrate examples of embedded EDI both in the EViR Guiding Principles and in EViR member practices (searchlight approach).
- Be an active voice in broader EDI discussions about representation of under-served and under-represented groups in the research workforce.

Pathways to achieve goals

To help achieve these goals, we will:

- Share and learn about members' EDI activities and approach to better understand priorities.

- Establish an EViR Working Group to focus on EDI, with possible sub-groups or interest groups depending on actions required.
- Identify leadership for this work area and draw engagement of relevant individuals from across the EViR membership to ensure expertise and interest in driving work forward.
- Agree on required changes to the EViR Consensus Statement and Guiding Principles.
- Work with the working group updating the Guiding Principles to review all Guiding Principles through an EDI lens and explore and articulate actions to embed EDI appropriately.
- Gather data on current funder practice in relation to EDI – what has worked.
- Develop case studies to share among members.
- Gather information on funder approaches to EDI monitoring data collection, and develop approaches to ensure consistency and improvement.
- Consider potential for collaborative or EViR endorsed action to improve EDI within the research funding process.
- Seek evidence of the benefits of actions taken based on vulnerable and location-based groups.
- Identify other organisations with an interest in EDI issues (including ESSENCE) and explore the potential for partnership.
- Consider the potential of Research on Research to address EDI issues in research funder practice.
- Develop a shared voice in relation to broader EDI workforce issues.

<p>Outcomes</p>

The outcomes expected from these activities are:

- A clear EViR commitment to addressing EDI issues and embedding EDI in research funding practices, as appropriate for EViR members
- Recognition of EViR as an organisation that promotes and supports EDI.
- Development of a library of case studies showcasing good practice in EDI in a range of under-served and under-represented groups, locations and populations.
- A shared approach to the collection and use of EDI monitoring data.
- A strong and visible record of collaboration in relation to EDI.

4. Sustainability

Why is it important?

Climate change is a major challenge to public health and risks increasing health inequalities. Alongside this, it is recognised that the provision of health and care services and research contribute substantially to greenhouse gas emissions and have a high environmental footprint, most notably through energy usage and travel. This is further supported by the WHO special report on climate change and health, which informed the COP26 Health programme, established to bring a stronger health focus to the climate change agenda.

Environmental impact can be seen across all elements of health and care delivery, including the delivery of health and care services, the delivery of research projects, the impact of research funding practices.

There are a growing number of initiatives and tools to support a better understanding of the environmental impact of health research funding and increasing recognition of the need to act. It is critical that action is taken in relation to both our practices as health research funders and creating more sustainable approaches and practices in the research we fund. However, most health research funders have a limited understanding of the environmental impact of their practices and those of the research they fund. In addition, few, if any, health research funders have a clear or comprehensive strategy to reduce carbon emissions.

Present situation

The impact of climate change on health service delivery and the health of the world's population is a significant global issue. There is real potential to have a much greater impact through a joint endeavour than by working on these issues individually. The level of urgency and potential for health research funders to collaborate should offer better solutions, more synchronous learning, more consistent practice and an effective pace for change.

EVIR has recognised the growing need to work collaboratively in this space, hosting a session at the roundtable meeting in October 2021 to explore how, as funders, we can better support reducing the environmental impact of research.

A second roundtable session, in March 2022, took a deeper dive into action being taken by the NIHR to reduce carbon emissions. In addition, the Forum heard about an initiative to support lower carbon clinical trials.

Discussions at these sessions suggest that, as funders, we currently work with limited or no requirements to adapt research practice with sustainability in mind, with few funders having a specific strategy or policy in place. The Forum has discussed several ideas and initiatives that could be taken, including training, toolkits, enhanced digital solutions to travel and mandating conditions for funding and supporting sustainable practice in trials. However, the initial challenge is knowing what works and having clear case studies on good practice and benchmarks to demonstrate the impact of any initiatives.

There are key opportunities for EViR as a forum in relation to:

- the influence we can have on making research more sustainable; and
- collaborating on or synthesising research funded on sustainable activity to enhance learning and enable the advancement of practices.

The drivers to make a significant change to the carbon footprint in health and care-related research funding are strong and urgent. There are two aspects to this issue:

- Developing a more sustainability approach to research funding practice.
- Developing a more sustainability approach to research project delivery and setting expectations for the researchers we fund.

As funders, we need to collaborate at a sufficient pace to build on the current ground swell and momentum, to better understand what a sustainable carbon footprint looks like, to make more use of tools to deliver more carbon-efficient approaches to our own practices and those of our funded research and to embed this within our policies and guidelines.

This current workplan focuses on activities relevant to environmental sustainability; however the discussion may expand to explore issues related to social and economic sustainability.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- To explicitly acknowledge sustainability within a revised EViR Consensus Statement.
- Establish a new Guiding Principle, or separate EViR position statement, in relation to sustainability.
- Have a collective understanding of what we can do as funders to change our own practice and the practices of the researchers that we fund.
- Have a collective view of what good looks like in sustainable research funding practice.
- Establish the expectations we can set as research funders to ensure that research is designed and delivered in a more environmentally sustainable way.
- Have a shared understanding of training and support needs in relation to sustainability across research funding organisations.
- Explore potential activities around social and economic sustainability.

Pathways to achieve goals

To help achieve these goals, we will:

- Establish an EViR Working Group to focus on sustainability.
- Identify leadership for this work area and draw engagement of relevant individuals from across the EViR membership to ensure expertise and interest in driving work forward.
- Work with the working group updating the Guiding Principles to agree on required changes to the EViR Consensus Statement and Guiding Principles.
- Share developments and practices across member organisations, developing case studies as examples of good practice.
- Seek opportunities for collaboration, both across the membership and with other organisations and research funders to better understand the challenges faced by funders and possible solutions.
- Use EViR as a platform for identifying wastefulness and duplication and agreeing on a common and consistent approach to reduce or eliminate wastefulness and duplication.

- Consider the potential of Research on Research to address sustainability issues in both research funder practice and research design and delivery.

Outcomes

The outcomes expected from these activities are:

- A clear EViR commitment to addressing sustainability issues.
- Recognition of EViR as an organisation that promotes and supports sustainability.
- Development of a library of case studies showcasing good research funder practice in relation to sustainability.
- A strong and visible record of collaboration in relation to sustainability.
- A shared EViR voice on sustainability in both research funding practice and research design and delivery issues.

5. Low and Middle-Income Countries (LMCI)

Why is it important?

It is widely understood that although developing countries bear the majority of global disease burden, only a small proportion of all health-related research funding is used to address this. The need to bolster research delivery in low and middle-income countries (LMIC) is recognised and being addressed by some health research funders, supporting knowledge generation with the aim of increasing capacity for evidence-based research delivery to fit local need.

With higher-income countries now looking to invest more health research funding in lower and middle countries, working together as funders could be more effective in supporting the potential for capacity building, community engagement and location-centric priority-setting for research within LMIC communities.

For EViR this raises the question of the applicability of the Guiding Principles to LMIC health-research funding activity, and the further question of how best to reach out and engage with the LMIC research funder community for mutual benefit.

EViR can play a key role in creating a collective and collaborative ethos that will support better and more effective engagement with LMIC funders.

Present situation

In Spring 2022, EViR held its first session to explore the LMIC health research funding landscape. The aim was to support a better understanding of global health research needs and consider how these relate to the EViR Guiding Principles.

From the early discussions, it was clear that while there is enormous interest across the Forum in engaging with LMIC funders, there is a wide variance in the extent to which members currently engage in activity in this area. Though some of the larger funders have specific global health research budgets, most members only fund within their own national boundaries, for example, so do not naturally connect with funders in low and middle-income countries.

It was felt that there is a strong need to clarify the EViR remit in relation to LMIC. The EViR remit should support bringing research funders from low and middle-income countries into the

EViR family to provide new perspectives, enhance understanding and bring about improvement in health-related research funding practice. It is not the role of EViR, per se, to increase research spend in low and middle-income countries.

Initial EViR activity in this space needs to be exploratory. There is a clear need for greater understanding of the LMIC research funding environment (or *environments*) but considerable potential for meaningful and mutually beneficial engagement and collaboration. There is a collective view across the membership that EViR should reach out to funders in low and middle-income countries in 'receive' rather than 'broadcast' mode, and start to consider how EViR activity can be enriched by this sharing of a broader range of perspectives.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- Establish a better understanding of the key players in LMIC health-related research funding.
- Establish a better understanding of the variance in drivers, priorities and activities across the LMIC health and care research community.
- Establish clear mechanisms for reaching out, engaging with and including health-related research funders from low and middle-income countries in EViR activity
- Create a shared understanding and international recognition of the relevance and applicability of the EViR Guiding Principles to research funding in low and middle-income countries.

Pathways to achieve goals

To help achieve these goals, we will:

- Establish an LMIC research funding interest group.
- Identify leadership and draw engagement of appropriate individuals from across the EViR membership.
- Clarify the EViR remit in relation to health-related research funders and funding in low and middle-income countries.
- Develop stronger ties with the ESSENCE Network, and explore the most effective and appropriate mechanisms for communicating with funders from low and middle-income countries.
- Undertake exploratory work to map the key players and activities in the LMIC research funding landscape.
- Create a roadmap/understanding of collaborative funder approaches to support capacity building and equitable partnerships in LMIC health research, including case studies.
- Develop, in partnership, clear mechanisms for involving relevant research funders from low and middle-income countries in EViR activity.
- Review the EViR membership model to ensure its appropriateness for funders from low and middle-income countries.

Outcomes

The outcomes expected from these activities are:

- Stronger connections and a productive working relationship with both ESSENCE and individual LMIC health-related research funders.

- An open and receptive membership model, enhanced collaboration and engagement, and greater representation within EViR of funders from low and middle-income countries.

6. Membership

Why is it important?

While the EViR Funders Forum has grown rapidly and organically through the best-endebours of the EViR Co-convenors, in order to sustain an organisation of the breadth and ambition of EViR it was necessary to move from a goodwill model to a subscription-based model.

The membership model supports the ambition of EViR and provides the stability needed for the development of a longer-term work plan. However, that stability cannot be taken for granted. It is therefore important that the Forum continues to consolidate and grow its membership.

Present situation

We are still transitioning to a new membership by subscription model. There are [three types of EViR membership \(two organisational, and one individual\)](#):

- Full members – health-related research funder organisations which have endorsed the Consensus Statement and the Guiding Principles.
- Associate members – organisations that represent funders or set health-related research funding policy which supports the Guiding Principles.
- Honorary members – individuals who are a leading voice in a field relevant to health research funding or represent a group of stakeholders whose voice should be present at the Forum discussions.

While the membership is growing, it currently reflects just over a third (36%) of the organisations that have engaged with the Forum since its inception. In addition, there are other funders who have not yet engaged with EViR but might become interested to do so. That means that there is scope to significantly grow EViR. While current income from subscriptions covers most of the core costs, we need to keep developing the membership if we are to fully achieve our ambitions and maximise our impact.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- Establish EViR as a respected and influential global organisation, with a diverse membership, known for its work in reducing avoidable waste and ensuring value in research.
- Create a stable and expanded membership that raises sufficient resources to support the work programme, while delivering activities that maximise the impact of the research we fund.
- Be an organisation known for the benefits offered to members that organisations want to be part of.
- Be an exemplar of cross-funder partnership working known for its impact.
- Be an organisation known for its welcoming and open approach to new members.

Pathways to achieve goals

To help achieve these goals, we will:

- Produce an up to date contact list, global in reach, of all funder organisations that have engaged with the Forum in the past.
 - Identify new potential members.
 - Review our approach and engagement programme.
 - Make sure the membership offer is clear.
 - Make sure benefits to members and impacts are well-captured and clearly articulated.
 - Ensure strong communication with existing members.
 - Guarantee effective and efficient delivery of EViR activities.
 - Ensure members have opportunities for engaging, sharing, learning and collaborating. .
 - Guarantee membership practices are fair and inclusive.
 - Provide value for money.
 - Have a strong programme of regular member events such as conferences, round tables, and webinars to keep members engaged and involved.
 - Develop the ambassadorial role of honorary and associate membership.
 - Maintain an updated website that captures members' stories, our external footprint and impact to further promote the Forum.
- Strengthen the capacity of the EViR Secretariat to support EViR activity, for example, by appointing assistants or offering student placements.

Outcomes

The outcomes expected from these activities are:

- Larger membership.
- Stable membership.
- Global breadth in membership.
- Members of different size and type adequately represented.
- Strong EViR presence and reputation as an effective organisation.
- Financial sustainability of EViR.

7. Governance

Why is it important?

Good governance will ensure effective and sustainable management of the Forum. A representative governance model is needed for decision-making and ensuring results meet the agreed objectives. An open, effective and accountable EViR governance structure can make a real impact on the Forum outputs and outcomes.

Some key themes for good governance include:

- Strategic leadership to support the vision and direction of the Forum.
- Appropriate representation and involvement of all members.
- Application of principles – The Guiding Principles must be of essential value and reflect the direction of EViR's purpose.
- Effective internal and external relationships.
- Transparency to build confidence.

Achieving effective and inclusive governance will ensure:

- Good planning within the organisation to support the EViR secretariat's capacity and their responsibility to EViR members.
- Inclusivity, with conscious efforts to ensure that all members have a voice and a stake in the EViR strategy, deliverables and activities.
- Fairness, transparency and accountability via decisions taken in accordance with the EViR strategy and vision.
- Sound and accountable financial management that will support the Forum's growth.

Present situation

The current EViR governance structure was established when the Forum moved to a paid membership model at the beginning of 2022. The current structure consists of:

- Steering Group (SG) – which includes representatives of a minimum of four full member organisations. Amongst other responsibilities, the Steering Group sets the strategic agenda and oversees the EViR work plan. [Steering Group Terms of Reference](#) (ToR).
- EViR Chair – who plays a key role in supporting the Secretariat and chairing the Steering Group providing strategic direction.
- Secretariat – which oversees and provides support across the Forums' activities.
- Working groups in discreet areas that meet to address specific items of interest identified by the members:
 - Strategy Working Group.
 - Dissemination and Implementation Working Group.
 - Pre-clinical Working Group.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- A clear, transparent and representative governance structure that meets the needs of a growing membership.
- Terms of Reference underpinning our governance structure and working practices that give all members equal opportunities to participate.
- A governance structure and working practices that support and facilitate diversity and inclusion across our membership.
- An enhanced and well-articulated role for an independent Chair.
- Published information about our governance structure on the EViR website to ensure full transparency.

Pathways to achieve goals

To help achieve these goals, we will work with our membership to:

- Open and expand Steering Group membership.
- Open working group and interest group membership.
- Establish new working groups, for example in relation to the update of the Guiding Principles, EDI, LMIC and sustainability, on the wishes and with the involvement of the membership
- Create clear and transparent Terms of Reference and publish these to ensure our working practices are inclusive and transparent
- Revise and review our governance model and related documentation at regular intervals.

- Ensure our working practices support the global nature of EViR ambition - for example working with colleagues from Southern hemisphere nations to find appropriate models of engagement and reaching out to funders from low and middle-income countries.
- When capacity allows, consider producing an Annual Report to capture main EViR activity and outputs.

Outcomes

The outcomes expected from these activities will ensure:

- A visible and transparent governance structure that offers opportunities to all members.
- A visible and transparent governance structure that reflects the breadth of the membership in terms of size, status, remit and geographical location.
- Providing important assurances and building trust for existing and potential new members.

8. Communications and Engagement

Why is it important?

Strategic communication and engagement are essential steps in the Forum's success. Effective communication and engagement strategies can help EViR improve the overall dissemination of Forum activities and outputs and will empower EViR to share information and engage with members and other relevant stakeholders effectively.

The strategy will aim to:

- Improve membership engagement;
- Promote the Forum to new members;
- Promote inclusivity and global breadth in membership;
- Create a standardised approach for interacting with stakeholders;
- Promote a visible and transparent governance structure.
- Promote the general activities and impact of EViR
- Enhance the presence and reputation of the Forum.

The strategy should capture EViR priorities, positioning and messaging. Other purposes include creating EViR brand recognition, reaching target audiences and expanding the membership.

In the current media landscape, there are numerous approaches to communicating with stakeholders, and it is important to identify the proper members' communication channels while keeping EViR goals and audience in mind. Strategic communication will bind EViR objectives to its core values, resulting in increased drive and better membership engagement.

Present situation

Since establishing the EViR secretariat, the Forum has increased its membership engagement and communications. This has been achieved via:

- launch of the new [EViR website](#), which includes the EViR membership details;
- increased email communications, focusing primarily on promoting EViR activities;
- creation of a Microsoft Teams community.

Goals in 3 to 5 years

Over the next 3-5 years, EViR will work to achieve the following goals:

- Strong forum brand recognition with EViR participation in conferences via panel sessions/presentations/poster sessions.
- Improved EViR communications to increase membership engagement.
- Active membership that shares information and engages widely in EViR activities. This will be achieved via a thriving community where members 'learn, collaborate, share and contribute' effectively

Pathways to achieve goals

To help achieve these goals, we will:

- Improve communications using new channels such as newsletters or platforms like LinkedIn.
- Stimulate members' engagement through the promotion of activities, encouraging members to share best practice: This might include:
 - newsletters which not only include information about the next EViR activities but also other information such as notes from the round table meeting.
 - effective use of the EViR Website, including communication about the work of the various Working and Interest Groups' activities, and information on membership.
- Actively engage with conference organisers to create opportunities for participation.
- Encourage members to promote their role/engagement with the Forum, for example, through statements on members' websites or in personal profiles.
- Arrange online 'hot topic' and informal coffee and chat meetings regularly, where members can discuss issues and share best practice.
- Create a library of knowledge categorised by topics accessible for members, including examples of good practice, for example through the EViR website.

Outcomes

The outcomes expected from these activities are:

- Growth of EViR brand recognition.
- Stronger members' community.
- Membership growth.
- The creation of a place where questions and topics can be raised and discussed among members and those belonging to member organisations.