Landscape Partnerships Programme Evaluation

**Organisation Heritage Lottery Fund**

**Department** Strategy & Business Development

**Title of procurement Landscape Partnerships programme evaluation; HLF008-0018**

**Brief description of supply** Research services.

**Estimated value of tender** Up to £15,000 including expenses and VAT

**Estimated duration** October 2015 to February 2016

**Name of HLF Contact** Chris Falconer
Strategy & Business Development
020 7591 6220
ChristopherF@hlf.org.uk

**Timetable** Tender Response deadline:
12:00Noon on 28 September 2015

Interviews may be held with shortlisted consultants and would take place on 7 October 2015

Outcome notification:
w/c 12 October 2015

# Overview

* 1. The Heritage Lottery Fund (HLF) was set up in 1994 under the National Lottery Act and distributes money raised by the National Lottery to support projects involving the national, regional and local heritage of the United Kingdom. We operate under the auspices of the National Heritage Memorial Fund (NHMF). Since April 2013 we have been operating under our fourth Strategic Framework: ‘A lasting difference for heritage and people’ (see the [HLF website](http://www.hlf.org.uk/aboutus/whatwedo/Pages/StrategicFramework2013to2018.aspx) for more details).
	2. HLF invests in the full breadth of the UK’s heritage, and through our funding we aim to make a lasting difference for heritage and people. This is reflected in the [outcomes for heritage, people and communities](http://www.hlf.org.uk/HowToApply/Pages/Outcomes.aspx) that underpin our grant-making.
	3. The Landscape Partnership (LP) programme offers grants of between £100,000 and £3m to schemes led by partnerships which aim to conserve areas of distinctive landscape character throughout the UK. LPs contribute to heritage conservation as an integral part of rural and peri-urban regeneration, aiming to create a holistic and balanced approach to the management of landscape heritage at a landscape-scale.
	4. The LP programme was launched in 2004 and to date 21 schemes have completed. HLF is looking for a service provider that will evaluate these 21 schemes against the programme outcomes set out in the guidance through desk-based research, telephone interviews and possibly via e-surveys. Then a successful service provider shall prepare a report for HLF with the outcomes of the evaluation.
	5. The primary audiences for the report are HLF’s Board of Trustees and HLF strategy staff. The report will be made available on the HLF website and circulated amongst landscape research organisations, statutory bodies, practitioners and the wider environmental sector. Results will also be shared amongst all participating grantees and on our Landscape Partnerships online community.

# Purpose of the evaluation

* 1. The report prepared as a result of the evaluation will be used as evidence to support continued investment in landscape-scale conservation and to ensure that past investment has been wisely used. HLF is also approaching the mid-point of our current strategic framework (SF4 2013-2018) so the report provides an opportunity to consider how we might continue, revise and evolve the programme as we start to think about our next strategic framework (SF5 2018 onwards).

# Methodology

* 1. Since 2004 the programme has used an outcomes approach. The current programme, introduced in February 2013, asks schemes to achieve nine defined outcomes compared to the earlier versions that only included four. However the current nine outcomes in the current programme align closely with the four priorities set out in the 2004 and 2008 programme guidance.

The 2004/8 priorities were:-

* Conserving or restoring the built heritage and natural features that create the historic character of the landscape,
* Conserving and celebrating the cultural associations and activities of the landscape area,
* Encouraging more people to access, learn about, become involved in and make decisions on their landscape heritage; and
* Improving understanding of local craft and other skills by providing training opportunities.

The 2013 outcomes are:-

* Heritage will be better managed
* Heritage will be in better condition
* Heritage will be identified/recorded
* People will have developed skills
* People will have learnt about heritage
* People will have volunteered time
* Negative environmental impacts will be reduced
* More people and a wider range of people will have engaged with heritage,
* The local area/community will be a better place to live, work or visit.
	1. The schemes to be evaluated were all delivered according to the programme guidance of 2004/8 which set out four outcomes. It is suggested however that the evaluation process should start by showing how the four 2004/8 outcomes map across to the 2013 nine outcomes, and that the evaluation results are then reported using the nine outcomes used within the current programme.
	2. HLF will make the following information available for this research project either as electronic or hard copy documents:-
* Stage 2 application forms created by the applicants
* Stage 2 case papers authored by HLF
* Output data collected from all schemes. This will be provided as an Excel spreadsheet
* Completion reports produced by individual schemes where they exist
* Evaluation reports produced by individual schemes where they exist
* GPS mapping files for all LP schemes
* An evaluation study of the LP programme dated 2011 which can be viewed on the HLF website [Landscape Partnerships Evaluation](http://www.hlf.org.uk/landscape-partnerships-evaluation)
* A review of LP legacy undertaken by consultant David Mount which can be viewed on the HLF website [Legacy Planning for Landscape Partnerships](http://www.hlf.org.uk/legacy-planning-landscape-partnerships)
* Contact details for all schemes
	1. Telephone interviews are to be conducted with scheme lead applicant bodies and ideally with a member of staff involved with scheme delivery. Consultants may also wish to consider using e-surveys of grantees and/or HLF appointed scheme monitors. HLF appoints expert consultants to monitor all projects during their delivery phase. These consultants are HLF’s eyes and ears on the project and tend to monitor several schemes at any one time. We have in the past undertaken e-surveys within other programmes to obtain evaluation feedback. Site visits are not required.
	2. Particular research questions we are keen are explored include the following:-
* What is the difference that these schemes have made for heritage, people and communities?
* Which schemes have delivered well and what were the attributes that made those schemes successful?
* Which if any schemes have delivered less effectively and what were the factors that made them less successful?
* Depending on time since completion, what kinds of legacy are we able to see following past HLF investment. By legacy we mean how are the individual projects delivered by the schemes generally being sustained post project completion and in particular does the partnership still exist and if so in what form?
* How helpful is the output data collected by all schemes in demonstrating the impact of the programme to wider strategic objectives such as Bio2020?
* What is the overall balance across the schemes between built, natural and cultural heritage?
* We are keen to understand how the outcomes achieved through the programme have helped deliver other objectives for the wider countryside, rural economy and environment. Is there evidence that although rooted in heritage and landscape character, these schemes are actually delivering on broader agendas and if so what are they and what evidence is there?

# Outputs

* 1. The following outputs will be required
* a draft report showing the layout of the final report, an explanation of the research methodology and key findings for discussion in mid-November;
* a final written report; and
* a short executive summary that is punchy, concise and accessible
* illustrative material such as graphs, pie charts or diagrams to illustrate the report and that could be used in a PowerPoint presentation to Trustees
* All research data, survey results and research notes used to provide evidence in the final report to be stored in a readily accessible electronic format such as Excel

All reports to include appendices as agreed between HLF and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in both hard copy and electronic format.

* 1. Reports and other documents produced under this contract MUST adhere to HLF’s accessibility and formatting requirements (appended).
	2. All bidders are required to adhere to all appropriate regulations and guidelines on the collection, storage, transmission and destruction of personal data ([MRS/SRA, Data Protection Act 1998: Guidelines for Social Research, April 2013](https://www.mrs.org.uk/pdf/2013-04-23%20MRS%20SRA%20-%20DP%20Guidelines%20updated.pdf)).
	3. The results will be confidential to HLF. HLF may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.

# Contract term and budget

* 1. We expect the research to begin in October 2015 and be completed by end of February 2016. The final report shall be submitted to HLF by 26 February 2016.
	2. The anticipated budget for this research is £15,000 including all expenses and VAT. The contract will be let by the National Heritage Memorial Fund. Payments will be made in two equal instalments. The first payment will be upon submission of the draft report and the final payment upon approval by HLF of the final report.
	3. Please note that the contract will be based on the HLF standard terms and conditions.

# Research management

* 1. The research will be managed on a day-to-day basis for HLF by Chris Falconer, Programme Manager for the Landscape Partnerships programme.

# Award Criteria

* 1. All bidders should ensure that their proposals for undertaking the work include the following:
* a detailed methodology for undertaking the study; please detail your proposal to meet all requirements to the research as set out in this brief
* a project plan
* please provide details of your research team proposed to deliver the contract including their skills and expertise The project manager / lead contact should be identified;
* the allocation of days between members of the team;
* the daily charging rate of individual staff involved;
* a timescale for carrying out the project;
* an overall cost for the work;
* at least two examples of similar work undertaken
	1. Your Bid will be scored out of 100%.

70% of the marks will be allocated to your response to the Quality Questions below. Each question will be scored using the methodology in the table below.

Tender responses submitted will be assessed by HLF against the following Quality Questions:-

1. To what extent does the tender response demonstrate an understanding of landscape-scale conservation and the issues related to this research brief?
2. To what extent is the methodology appropriate to the research requirements set out in this brief?
3. What is the extent of experience of landscapes and landscape-scale conservation amongst individual members of the research team?
4. How well has the tenderer structured a research team in order to successfully manage the contract and deliver the required work to the budget and timetable required by HLF?

**Quality Questions scoring methodology**

| **Score** | **Word descriptor** | **Description** |
| --- | --- | --- |
| **0** | **Poor** | No response or partial response and poor evidence provided in support of it. Does not give the HLF confidence in the ability of the Bidder to deliver the Contract. |
| **1** | **Weak** | Response is supported by a weak standard of evidence in several areas giving rise to concern about the ability of the Bidder to deliver the Contract. |
| **2** | **Satisfactory** | Response is supported by a satisfactory standard of evidence in most areas but a few areas lacking detail/evidence giving rise to some concerns about the ability of the Bidder to deliver the Contract. |
| **3** | **Good** | Response is comprehensive and supported by good standard of evidence. Gives the HLF confidence in the ability of the Bidder to deliver the contract. Meets the HLF’s requirements. |
| **4** | **Very good** | Response is comprehensive and supported by a high standard of evidence. Gives the HLF a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the HLF’s requirements in some respects.  |
| **5** | **Excellent** | Response is very comprehensive and supported by a very high standard of evidence. Gives the HLF a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the HLF’s requirements in most respects. |

**30% of marks will be awarded for Price.**

Price: The evaluation of price will be carried out on the Schedule of charges you provide in response to **Table A**

| Price Criterion | 30 marks will be awarded to the lowest priced bid and the remaining bidders will be allocated scores based on their deviation from this figure. Your fixed and total costs figure in your schedule of charges table will be used to score this question.For example, if the lowest price is £100 and the second lowest price is £108 then the lowest priced bidder gets 30% (full marks) for price and the second placed bidder gets 27.6% and so on. (8/100 x 30 = 2.4 marks; 30-2.4 = 27.6 marks)  | **30%** |
| --- | --- | --- |

**The scores for quality and price will be added together to obtain the overall score for each Bidder. The Bidder with the highest score will be the preferred Bidder.**

**Table A - Schedule of Charges**

Please show in your tender submission, where applicable, the number of staff and the amount of time that will be scheduled to work on the contract with the daily charging rate.

Please complete the table below providing a detailed breakdown of costs against each capitalised description, detailing a total and full ‘Firm Fixed Cost’ for each element of the service provision for the total contract period. Bidders may extend the tables to detail additional elements/costs if required.

VAT is chargeable on the services to be provided and this will be taken into account in the overall cost of this contract.

As part of our wider approach to corporate social responsibility the National Heritage Memorial Fund/Heritage Lottery Fund prefers our business partners to have similar values to our own. We pay all of our staff the living wage (in London and the rest of the UK) and we would like our suppliers and contractors to do likewise. Please highlight in you proposal/tender/bid whether you do pay your staff the living wage.

Bidders shall complete the schedule below, estimating the number of days, travel and subsistence costs associated with their tender submission.

**TABLE A: (firm and fixed costs)**

|  | **Post 1 @cost per day****(No of days)***e.g. Project Manager/ Director**@ £500* | **Post 2 @cost per day****(No of days)***e.g. Senior Consultant/manager/researcher**@£300* | **Post 3 @cost per day****(No of days)***Junior* *Consultant/equivalent* *e.g. £200* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Fund | *e.g. 0.5* | *1* | *1.5* | *3* | *850* |
| *[Add as necessary]* |  |  |  |  |  |
| *[Add as necessary]* |  |  |  |  |  |
| *[Add as necessary]* |  |  |  |  |  |

| **Cost Type** | **Value (£)** |
| --- | --- |
| Sub - Total  |  |
| VAT |  |
| Total\* |  |

\* (This must include all expenses as well as work costs; this figure will be used for the purposes of allocating your score for the price criterion and must cover the cost of meeting all our requirements set out in the ITT)

*Notes: The HLF reserves the right to reject abnormally low tenders. The HLF reserve the right to amend the timetable of work where required*

*You should not submit additional assumptions with your pricing submission. If you submit assumptions you will be asked to withdraw them. Failure to withdraw them will lead to your exclusion from further participation in this competition.*

# Procurement Process

* 1. HLF reserves the right not to appoint and to achieve the outcomes of the evaluation through other methods.
	2. The procurement timetable will be:
* Tender return deadline: completed proposal to be returned to HLF by 12:00 noon on 28 September 2015.
* Interviews may be held with shortlisted consultants and would take place on 7 October 2015
* Notifying about the outcomes of the procurement on w/c 12 October 2015
	1. Your tender proposals must be sent electronically via e-mail before the tender return deadline of 12:00 noon on 28 September 2015 to the following contact:

Christopher Falconer

Heritage Lottery Fund

Holbein Place

London

SW1W 8NR

ChristopherF@hlf.org.uk

* 1. Please visit the [HLF website](http://www.hlf.org.uk/Pages/Home.aspx) for further information about the organisation.

# Appendix: Accessibility and formatting requirements

Reports and other documents created for HLF need to be clear, straightforward to use, and ready to circulate internally, externally and online, as well as suitable for use by screen reading software. Requirements in accessibility is summarised below:

## Readability

In the final report, consultants should ensure that:

* the size of the font is at least 11pt;
* there is a strong contrast between the background colour and the colour of the text. Black text on a white background provides the best contrast. This also applies to any shading used in tables and / or diagrams;
* Italics are only used when quoting book titles for citations and items on the reference list should be arranged alphabetically by author; and
* colour formatting and use of photos should be of a resolution size that is easily printable and does not compromise the printability of the document.

For further guidance on ensuring readability of printed materials, please refer to the RNIB Clear Print guidelines. These can be found on the [RNIB website](http://www.rnib.org.uk/Pages/Home.aspx).

## Accessibility

Reports should adhere to the following guidelines:

* **Formatting**

Headings and content in your document should be clearly identified and consistently formatted, to allow easy navigation for users. Heading Styles should be used to convey both the structure of the document and the relationship between sections and sub-sections of the content.

* **Spacing**

Screen readers audibly represent spaces, tabs and paragraph breaks within copy, so it is best practice to avoid the repetitive use of manually inserted spaces. Instead, indenting and formatting should be used to create whitespace (e.g. use a page break to start a new page, as opposed to multiple paragraph breaks).

* **Alternative text**

Alt text is additional information for images and tables. This extra information is essential for both document accessibility (screen reading software reads the Alt text aloud) and for the web. Alt text should be concise and descriptive, and should not begin with ‘Image of’ or ‘Picture of’.

* **Images**

These should be formatted inline with text, to support screen readers. Crediting pictures may be necessary, usually in response to a direct request from a third party.

* **Tables**

These should be for used for presenting data and not for layout or design. They should also be simple, and include a descriptive title.

## Additional documents

Any additional information, separate to the report, for example proformas and transcripts that may be used as standalone documents must be fully referenced to the piece of work being submitting and therefore dated, formatted and numbered appropriately.

## Acknowledgement

All reports should acknowledge HLF. Our logo can be found on the [HLF website](http://www.hlf.org.uk/grantholders/acknowledgement/Pages/Logosandacknowledgement.aspx).