**Invitation to Tender**

**Measuring the Grants Portfolio Carbon Footprint and a Pathway to Decarbonisation**

**Ref: NHMF 312**

**Schedule 5**

**Tender Response Document**

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# SECTION 1 – GENERAL DETAILS:

# Organisation Details:

Organisation’s full name: <Please insert here .......>

Business address (this will be the address the Fund will use to send any correspondence to you): <Please insert here .......>

Registered address (if any - this will be the address registered with Companies House): <Please insert here .......>

Company number: <Please insert here .......>

VAT Registration number (if any): <Please insert here .......>

Charity Registration number (if any): <Please insert here .......>

Are you classified as an SME organisation?: <Please insert here .......>

Are you classified as a Voluntary Community and Social Enterprise (VCSE) organisation?: <Please insert here .......>

Are you registered as a Community Interest Company (CIC)? :<Please insert here .......>

Are you registered as a B Corp?: <Please insert here .......>

# Main contact for the work:

Name: <Please insert here .......>

Title: <Please insert here .......>

Telephone: <Please insert here .......>

Email: <Please insert here .......>

# Carbon Net Zero & Sustainability Statement:

Please insert a statemen below that identifies the key steps your organisation is taking to become Carbon Net Zero (along with the year you aim to become Carbon Net Zero) along with any other Sustainability initiatives (max words 2,000 words)

<insert details here … >

# Terms & Conditions of Contract (including Liabilities):

Please confirm you can comply with the Terms & Conditions of the Contract <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>

Please confirm you can comply with the following Terms & Conditions of the Contract –

* Service Provider’s liability limitation - (Clause E1.4 of the Contract) = £250,000 <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* The Fund’s liability limitation - (Clause E1.5) - The Fund’s liability is limited to an amount equal to the total charges payable under this Contract. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Please confirm you can comply with the Terms & Conditions of the Contract <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Insurance period - (Clause E2) - The Service Provider must take out and maintain insurance for the term of this Contract and for six years after its termination or expiry. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Public liability - (Clause E2) - £1,000,000 (one million pounds) for any one incident. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Professional indemnity - (Clause E2) - £1,000,000 (one million pounds) for any one incident. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>

Please identify any other Terms & Conditions of the Contract that you would not be able to comply with <Please insert here…..>

# Payment Details:

Time of payment - (Clause D1.1 of the Contract) - insert payment schedule or time for payment, e.g. 30 days after the Fund’s receipt of a valid invoice. <Please insert here .......>

Method of payment - (Clause D1.1) insert method, e.g. cheque or electronic funds transfer. <Please insert here .......>

Time of invoice – (Clause D1.2) – e.g. after completion of all the Services. <Please insert here .......>

# Other requirements:

6.1 – Standards: Please insert here any specific standards that will apply. These will form part of any contract entered into (see Clause A3.1.2 of the Contract). <Please insert here .......>

# SECTION 2 – SPECIFIC DETAILS:

Please refer to the evaluation model to ensure you consider the score weightings when responding.

Please ensure this entire document, including your responses is a maximum of 18 pages in length (i.e., this template currently contains 10 page, so your response should add a further 8 pages) .

# Methodology

Please insert your method statement below

It is essential that you address the following assessment criteria:

* Demonstrate a clear understanding of the aims, objectives and main concerns of the research
* Demonstrate that the methods selected are appropriate to the research requirements set out in this brief
* Demonstrate an awareness of the different policy contexts, research and issues relating to climate change and environmental sustainability.
* Demonstrate experience of measuring a wide range of scope 3 emissions and working with complex organisational structures such as multiple affiliated organisations.

<insert details here … >

# Project Plan

Please insert a project plan relating to this piece of work.

It is essential that you –

* Demonstrate a clear and realistic project plan, showing phases of the research, tasks for each phase and roles and responsibilities for each member of the team.

<please send your response to this question as a separate file. Please use the file name ‘Project Plan for NHMF 312’ >

# Input from the Fund

Please insert here any input from the Fund that will be required. Any requirements (if agreed) may form part of any contract entered into (see Clause C5.2)

<insert details here … >

# Risks and Mitigations

Please provide a consideration of anticipated risks associated with the work and their mitigation.

<insert details here … >

# Record on producing high quality research outputs

It is essential that you -

* Demonstrate a record of producing high quality research outputs in a range of formats for both expert and non-expert audiences. With a track record of communicating findings in a creative and concise way, appropriate to their intended audiences.

The Heritage Fund will award additional marks to suppliers who can show that they have experience of creating research outputs which meet government standards on accessibility[[1]](#footnote-1). The Service Provider must comply with the Accessibility requirements set out in the Fund’s Specification Brief and attached to the Statement of Work as Appendix 1.)

* Please also note the requirement to submit an example report you have previously produced.

<insert details here … >

# Previous Experience:

Please insert details of your previous experience below, demonstrating a record of producing high quality research reports to support strategy development in the Heritage and/or Cultural sector.

In order to respect commercial confidentiality, you can state the contract value to within £20,000 of the actual amount. For example, a contract with a value of £70,000 could be expressed as £60,000 - £80,000 or as £70,000 to £90,000, etc.

|  |  |  |  |
| --- | --- | --- | --- |
| **Start & end date (approx.)** | **Client** | **Approx. value** | **Project details, and why you feel it demonstrates your previous experience in relation to our requirements:** |
|  |  |  | <insert details in the table. Max 300 words per example> |
|  |  |  | <insert details in the table. Max 300 words per example> |
|  |  |  | <insert details in the table. Max 300 words per example> |

# Staffing:

Please insert details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified;

<insert details here … >

Please attach CVs for the key staff (minimum of 3 CVs, maximum of 5 CVs)

<please send your response to this question as a separate file. Please use the file name ‘CVs for NHMF 312’ >

# Financial ‘Bid’ Model:

Please append a detailed financial (or ‘bid’) model. This must be provided as a spreadsheet, and include the following –

7.1 - details of staff allocated to the project (these must be the same as those identified above), together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified;

7.2 - the allocation of days between members of the team;

7.3 - the daily charging rate of individual staff involved;

7.4 - an overall cost for the work shown as a total, matching the response given to question 8 below.

<please send your response to this question as a separate file. Please use the file name ‘Bid Model for NHMF 312’ >

# Tendered ‘Bid’ price:

Please state your Tender price <insert here £………… (excl. VAT) >

Please state your Tender price <insert here £………… (incl. VAT) >

# Additional Documents

In addition to the separate files requested above please also submit:

1. One example of a report produced for a client.
2. One example of a data collection tool and accompanying guidance you have provided to a client. This does not need contain actual data.

1. Understanding accessibility requirements for public sector bodies: <https://www.gov.uk/guidance/accessibility-requirements-for-public-sector-websites-and-apps> [↑](#footnote-ref-1)