



**Dacorum**  
Heritage



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Request for Proposal (RFP)  
Dacorum Heritage 30:30  
Supplier Instructions

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This document is strictly confidential and **not** for general circulation.

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# 1 Dacorum Heritage 30:30 Request for Proposal (RFP)

This RFP is designed to provide us with the information required to assess your organisation's suitability to be a supplier to The Dacorum Heritage Trust Limited (DHT) for the provision of consultancy services.

The word organisation refers to a sole trader, partnership, incorporated company or other business entity in the UK; or a similar entity operating outside the UK, as appropriate.

This RFP must be fully completed in English, stating 'nil' or 'not applicable' rather than leaving blanks. All information supplied must be accurate and up to date. DHT reserves the right to refuse to consider your response if the supplier questionnaire in this document or any of the questions in the attached appendices are not fully completed or are found to be inaccurate.

Information or documents submitted in response to this RFP must relate to the organisation that will enter into a formal agreement with DHT.

Where any question refers to relevant UK legislation, non-UK organisations may answer on the basis of applicable laws in their own country but should provide a reference for EU or UK equivalency.

All responses and submissions provided may form part of any subsequently awarded contract.

Note – DHT will not be liable for any costs or expenses incurred by suppliers in completing this RFP.

Any additional information required by a supplier should be requested from the point of contact in section 7 [Contact Details](#) by email in accordance with the timetable in section 6 [Timescales](#). In the interest of fairness, DHT reserves the right to share such requests and responses with competing suppliers (the source of any questions will not be disclosed).

Proposals may not be considered if complete information is not given in the Proposal or if the particulars asked for in the schedule are not fully filled in.

The RFP response (including relevant appendices) must be completed and submitted no later than **Friday 10<sup>th</sup> November 2023**. DHT reserves the right to reject any response that fails to meet this deadline.

## 2 Company Overview

Dacorum Heritage is unlike any other museum, as it currently operates from a museum store. There is no dedicated open gallery space, so staff and volunteers must think creatively when engaging local communities with local history.

In its 30th anniversary year, Dacorum Heritage (DH) has reached a critical point in its existence. It has outgrown its original, temporary Museum Store (a converted former Victorian fire station behind the Civic Centre in Berkhamsted, Hertfordshire) and can no longer accept new accessions to its own collection or those of local groups and organisations in the Borough of Dacorum for which it is currently storing and caring for over 130,000 items. The building is too small for the size of collections, has significant environmental challenges, and is inaccessible to visitors. This position is not sustainable and a fundamental strategic review to make DH fit for purpose for the next 30 years is essential.

The Borough Council has offered to consider DH's future physical infrastructure needs in its next Budget. As a result, the Board of Trustees of DH are looking to better understand the potential for the collection, through the eyes of stakeholders and those not currently engaging with the collection. A similar project looking at the collection's needs will also take place.

This project is vital for DH to develop a proposal for consideration by the Council in December 2023 to ensure that the heritage collections and their potential for engaging and inspiring communities in Dacorum and beyond is not lost for future generations.

### 3 Confidentiality

All information contained in this RFP is confidential and may not be passed on to any third party other than what is strictly necessary for the purposes of submitting your Proposal. You must also ensure that a similar obligation of confidentiality is placed upon any third party to whom you may need to disclose any of this documentation for the purposes of the RFP. Likewise, all information provided by suppliers in their Proposals, will be treated in confidence by DHT.

Suppliers must undertake not to make any reference to DHT in any literature, promotional material, brochures or sales presentations, nor make use of any DHT logo, trademark or other proprietary identifying symbol without the prior written consent of DHT.

### 4 RFP Principles

If it is found at any point when considering this RFP that circumstances prevent you from responding to it, please contact DHT as soon as possible to enable us to evaluate the effects of such a withdrawal upon the selection process.

DHT reserves the right to accept in part or entirety any proposals submitted.

### 5 Purchase to Pay Requirements

Should DHT choose to enter into a contract with your organisation, you will be required to:

- ensure purchase order numbers are quoted on **all** invoices you send to DHT.
- only provide goods or services upon receipt of a Purchase Order from us which specifies our requirement.

### 6 Timescales

Indicative project timescales will be to start 20<sup>th</sup> November 2023 and complete by 31st January 2024. The phasing of this approach will be agreed with the successful suppliers and DHT reserve the right to flex the timescales as appropriate.

#### 6.1 Key Dates and Activities

Key activities and target dates for the RFP process are set forth below. DHT may change these dates at its sole discretion and convenience, without liability.

Please note that suppliers must plan to have their resources available during the dates shown above. If the dates change for any reason, a revised schedule will be communicated as applicable.

Activity	Dates
Release of the RFP	9 <sup>th</sup> November 2023
Supplier intent on responding to the RFP	17 <sup>th</sup> November 2023
Last date for questions on RFP	20 <sup>th</sup> November 2023
DHT response to questions	22 <sup>th</sup> November 2023
Supplier to submit its RFP response	24 <sup>th</sup> November 2023
Confirmation of DHT decision	29 <sup>th</sup> November 2023

## 7 Contact Details

Any general queries on this RFP should be sent to the Trustees: **Please contact Dacorum3030@dacorumheritage.org.uk**

### Tenderer Information

#### 7.1 Contact Details:

1. Name:
2. Position within organisation:
3. Address:
4. Telephone:
5. Mobile Phone:
6. Fax No:
7. E-mail:

#### 7.2 Other Information

8. Is the applicant in administration or subject to bankruptcy proceedings at the present time, or are the directors/principals aware that this is likely to be the case?

YES

NO

9. If yes, please give details: (Maximum 150 words)

10. Has the organisation or any directors, partners, associates, or the company secretary been convicted of a criminal offence relating to the conduct of their business or professions, or committed an act of grave misconduct during their business or profession?

YES

NO

11. If yes please give details:(Maximum 150 words)

12. Has your organisation ever failed to meet its obligations to pay taxes or social security contributions in the United Kingdom or other EU member state?

YES

NO

13. If yes please give details:(Maximum 150 words)

14. Is your organisation a member of a group of companies?

YES

NO

15. If YES give the names and company numbers of the ultimate holding company and associated companies, clearly stating the relationship with your organisation in the questions below:

Company Name:

Company Number:

Relationship:

What is your organisation's VAT number:

Number of employees:

### 7.3 Financial Information

16. Please detail your company turnover and net profit for the last three full year accounts:

	Turnover	Net Profit
Last Financial Year		
Previous Year		
Year Before		

You may be required to provide your most recent three years' full audited accounts if appropriate (or for the period of your incorporation or trading if less than 3 years) (Modified balance sheets, without trading account summaries and details of turnover are not acceptable). Please only provide these if requested by an officer of DHT. This requirement shall be determined by your perceived level of criticality to our supply base. Electronic versions of accounts are acceptable, if required.

17. Please confirm that you will provide these if requested by an officer of DHT.

YES

NO

18. Please confirm that you agree to provide a banker's reference if requested.

YES

NO

## 8 Insurance

19. DHT require confirmation that if awarded a contract your organisation will provide a minimum level of insurance. A copy of the policy summary for each insurance policy and evidence that the premium has been paid must be provided before a contract can be awarded.

20. Public Indemnity: Please state maximum level of insurance held.

21. Employers Indemnity: Please state maximum level of insurance held.

22. Professional Indemnity (If applicable): Please state maximum level of insurance held.

23. Have any claims in excess of £50,000 been made under your organisation's Employers, Product, Public or Professional indemnity policy within the last three years?

YES

NO

If yes please give details;

24. Has your organisation had any default notices issued against it or any incurred any liquidated damages or penalties during the last 3 years in respect of comparable services.

YES

NO

25. Has your organisation had a contract that was not renewed for failure to perform to the terms of that contract.

YES

NO

26. Has your organisation been censured or fined by a governing body for failure to comply with their rules / legislation?

YES

NO

27. If you have answered YES to any of the four questions above, please provide details. (Maximum 150 words)

28. Do you propose to sub-contract or franchise any part of the delivery of the goods, works or services to be provided to DHT?

YES

NO

May be considered, subject to contract.

29. If yes, please give details.

## 9 Corporate Social Responsibilities

30. Do you have a policy for your corporate social responsibility?

YES  
NO

## 10 Anti-Bribery & Corruption and Gifts & Hospitality

31. Does your organisation have an Anti-bribery & Corruption Policy? If yes, please attach

YES  
NO

32. Does your organisation have any other Anti-Bribery procedures?

YES  
NO

33. If yes to either of the two questions above how are these communicated to employees and enforced? (Maximum 150 words)

34. Does your organisation have a Gifts & Hospitality Policy? If yes, please attach.

YES  
NO

35. Please give details of up to 3 clients to which you have provided comparable Managed Print solutions of scale & scope to this requirement by BIMM. Where possible ensure that they are UK based Universities but also where possible have sites, campuses in other European countries.

## 11 RFP Responses

The table below contains a summary of the documents comprising this Request for Proposal from DHT and indicates where suppliers should update the document and return it in their response submission.

Suppliers should adhere to the timescales set out in section 6.1 in submitting their response and DHT will do so accordingly in responding to questions arising.



Responses should in all cases clearly and concisely answer the questions asked and answers should only be submitted using the templates supplied by DHT for the purpose.

Document Name	Document/ Section Title	Response Required
Supplier Instructions	This document	<ul style="list-style-type: none"> <li>Completed and returned document.</li> <li>Copy of supplier standard T&amp;C's</li> </ul>
Supplier Proposal	<ul style="list-style-type: none"> <li>Expression of interest</li> <li>Detailed work plan setting out how the requirements of the brief will be delivered.</li> <li>Budget breakdown</li> <li>Evidence of similar projects delivered</li> </ul>	<ul style="list-style-type: none"> <li>Word document</li> </ul>

## 11.1 Scope of Services

DHT is evaluating solution options for a supplier to work as consultant to deliver:

### Workstream A: Stakeholder Consultation

DH is looking to complete a comprehensive Stakeholder Consultation Exercise to establish:

- What services our stakeholders require now and in the future.
- Identify who is being served by DH now and who DH is not currently reaching.
- Identify new services needed to reach underserved communities.
- Identify the preferred or most effective communication channels to reach and engage our stakeholders.
- Challenges or obstacles in engaging with Heritage projects/initiatives.
- Gain insights from the various stakeholder groups into how DH (or heritage in general) could offer opportunities or contribute to making the local area a better place to work, live or visit.

The outcomes of this consultation will contribute to a Dacorum Heritage 30:30 strategy that reflects on our current collections and operating practices. This plan will form the basis of our Dacorum Heritage 30:30 vision and future business model, public engagement strategies and collections policies.

Stakeholders include:

- Local History Societies across Dacorum
- Dacorum Borough Council
- Local primary, secondary and special schools
- Families
- Care homes
- Libraries
- Local community groups
- Young people, including those on work experience placements.
- Shopping centres
- Policymakers
- Local media (traditional, digital, and social media)
- The business community
- Creative industries (including digital innovation, gaming, VR agencies,)
- Academia

The outcomes of this consultation work will support Dacorum Heritage to apply for funding that will allow the organisation to put in place a long –term strategic plan that will:

- Involve a wider range of people in heritage.
  - Young people (13 –24 years)
  - Young adults (24+ years)
  - Families not currently engaging with local heritage.
  - Socially isolated older people
- Create an accessible and equalities led engagement strategy.
- Make the local area a better place to work, live or visit.
- Describe the opportunities for us to work with DBC Place Strategy.
- Make the organisation more resilient.
- Organisational and financial sustainability to ensure that that the collection and the services being provide to the community are secured for the next 30 years.
- Opportunities for ongoing income generation
- Expansion of donor and grant-maker support
- Deliver benefit to the people of Dacorum and secure long-term support of DBC.
- Achieve long term environmental sustainability and inclusion.
  - Ambition to be Net Zero Carbon by 2030.
- Embed equity, diversity, and inclusion as core principles in the strategy.

#### **Deliverables**

- Stakeholder Engagement Report
- Presentation of findings to Board, with presentation available afterwards
- Documentation of findings
  - Imagery
  - Recordings
  - Statistics
  - Or similar

#### **Timeframe**

Stakeholder engagement: December/ January 2024

Finalised report and presentation: End of January 2024.

#### **Budget**

Fee: £20,000 to include expenses for participants.

#### **Workstream B: Collection Condition Review**

DH is looking to complete a comprehensive condition review of the collection in line with Spectrum 5.0 Standards to establish to overall condition of the collection to include:

- (a) identifying risks, issues and conservation needs of the collection through a detailed condition analysis
- (b) identifying opportunities for rationalisation
- (c) understanding the significance of the collections in Dacorum
- (d) identifying opportunities for reducing the environmental impacts of the collection e.g., reduction of single use plastics, use of recycled materials

The outcomes of this condition review will contribute to a Dacorum Heritage 30:30 strategy that reflects on our current collections and operating practices. This plan will form the basis of our Dacorum Heritage 30:30 vision and future business model and collections policies.

The outcomes of this consultation work will support Dacorum Heritage to apply for funding that will allow the organisation to put in place a long –term strategic plan that will ensure organisational and financial sustainability.

### **Deliverables**

- Collection Condition Report
- Presentation of findings to Board, with presentation available afterwards
- Documentation of findings
  - Imagery
  - Recordings
  - Statistics
  - Or similar

### **Timeframe**

Collection Condition Review: Mid-January 2024

Finalised report and presentation: End of January 2024.

### **Budget**

Fee: £20,000 to include expenses.

## **Workstream C: Statement of Requirements from a RIBA Client Advisor**

Dacorum Borough Council (DBC) has asked DH to produce a “Statement of Requirements” for the type / size of premises that would be needed for DH to be able to operate effectively in the coming years. The future service requirements for the premises requirements will be informed by the audience engagement strategy, stakeholder consultation exercise, and collections condition review being commissioned in parallel to this Statement of Requirement procurement exercise.

It is the Trustees’ opinion that major works will in due course be required to develop suitable, sustainable buildings to provide viable storage and exhibition facilities, which will enable the Trust to meet its service requirements, and to continue to provide a fit-for-purpose heritage service to Dacorum Borough Council, the Local History Societies, and the residents of Dacorum.

DBC has specified that the Statement of Requirements should be prepared on a “location neutral” basis so that the resulting deliverables are capable of being applied to any subsequent redevelopment project they propose to undertake in the Borough. However, consideration should also be given to the option for redevelopment of the current site.

### **Background**

The existing Museum Store infrastructure and M&E services are life-expired, and the building needs extensive refurbishment. The Store currently has 265m<sup>2</sup> of storage, no research or learning facilities, and no exhibition space. The store is full, and no further objects can be accepted for storage. Significant further archaeological remains are anticipated because of future excavations required of the borough development plan proposed by Dacorum Borough Council.

The collections require suitable facilities for the safe and secure storage of the diverse objects held, which would need to be environmentally controlled. A suitable space is also required to undertake conservation and restoration of objects and exhibition preparation.

Proper office space should be attached, large enough to accommodate staff, volunteers, researchers, and temporary project staff. Additionally, there would need to be a flexible learning and meeting space for school and adult workshops, local history societies, and visitors.

As a 'Museum without Walls' our future interaction will rely upon a robust IT infrastructure and web presence. A full review of future requirements will be undertaken as a key element of the development of the client requirements and business case.

Any development must provide the space and facilities to enable the Trust to properly satisfy modern museum criteria and safely conserve local history. This in turn would attract more volunteers, enhance staff satisfaction, enhance the potential of attracting grants, satisfy the articles of association, and comply with DBC requirements.

### **Requirements**

The Trustees of DH believe this work stream should cover RIBA Stages 0 and 1, resulting in the activities / deliverables identified in "Core Tasks" and "Information Exchanges" rows of the RIBA Plan of Work template 2020.

Taking account of the results of the stakeholder consultation exercise and collections condition review being commissioned in parallel, the contractor will be required to:

- Prepare a statement of **Client Requirements**, taking account of the outcomes of the audience engagement strategy, stakeholder consultation exercise, and collections condition review.
- Review **Feedback** from previous projects (particularly an unsuccessful bid for a museum and gallery at The Bury, Hemel Hempstead)
- Undertake a **Site Appraisal** of the existing Museum Store location and other DBC owned locations.
- Source **Site Information** including **Site Surveys**
- Undertake **Feasibility Studies**
- Develop a **Business Case** for feasible options, including a review of **Project Risks** and **Project Budget**
- Ratify the option that best delivers **Client Requirements**
- Prepare **Project Brief** including **Project Outcomes** and **Sustainability Outcomes**, **Quality Aspirations** and **Spatial Requirements**
- Agree **Project Budget**
- Prepare **Project Programme**
- Prepare **Project Execution Plan**

### **Key deliverables:**

- Overview report (i.e., "Statement of Requirements") for delivery to DBC summarising above.
- Draft PowerPoint presentation for use by DH when delivering report.

### **Timeframe**

Consultancy starts: 1<sup>st</sup> December 2023

Delivery of Statement of Requirements report: Mid-February 2024

### **Budget**

Fee £20,000

## 11.2 Locations

The Museum Store is based in Clarence Road Berkhamsted HP4 3YL.

The services are to be provided across the Borough of Dacorum.

## 11.3 Project Background

This Project is being funded by a grant from The National Heritage Lottery Resiliency Fund and will deliver a well-researched Statement of Requirements by December 2023.

We have leased our current premises from Dacorum Borough Council (DBC) for the last 20 years at a nominal rent. However, the Borough Council's strategic plan has identified our site for development within the next five years. We need to find a new home – quickly.

DBC has offered to consider DH's future physical infrastructure needs in its next Capital Budget and have been invited to submit a Statement of Requirements by December 2023, hence the urgency for this project. We can only be sure of providing a robust and relevant Statement by ensuring the views of all our stakeholders – the community, volunteers, and DH team – are considered, alongside the needs of the Collections we care for. We will also need to provide DBC with evidence of our ability to raise funds.

DBC's plans for redevelopment of the site coincide with a critical point in DH's development. Our current building is too small for the 130,000+ items we already care for, has significant environmental challenges and is inaccessible to visitors. Working space restrictions are limiting volunteering opportunities and reducing the ability to engage the community with the collections. Consequently, there is a window of opportunity to gain DBC support for a new, fit-for-purpose site for Dacorum's heritage collections and a hub for public engagement and volunteering.

## 12 Criteria for Evaluation

1. Viability of Proposed Solution
2. Prospective Supplier experience and reputation
3. Ability to deliver the services as outlined in the requirements.
4. Financial proposal
5. Resource approach

All of these will be assessed across written responses to this RFP.

## 13 Contractual Terms

The contract will be undertaken under the supplier's terms and conditions subject to these being acceptable to DHT.