



## **Invitation to Tender**

### **Strategy Development Research**

**Ref: NHMF 308**

#### **Schedule 2: Specification.**

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#### **1. Overview**

- 1.1 The National Lottery Heritage Fund, formerly the Heritage Lottery Fund (HLF), is an operating name for the Trustees of the National Heritage Memorial Fund (NHMF). In 1994 the NHMF was given authority under the National Lottery Act to distribute money raised by the National Lottery to support projects involving the national, regional and local heritage of the United Kingdom. In January 2019 we launched our current Strategic Framework: 'Inspiring, leading and resourcing the UK's heritage'. See The [Fund's website](#) for more details.
- 1.2 The Fund 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 which underpin our grant-making.
- 1.3 In March 2022 our Chair Dr Simon Thurley CBE gave a speech at the Heritage Alliance stressing the need to take the lessons from the COVID-19 pandemic and use them to shape a new vision for the next 10-15 years. This includes thinking about how the UK will be improved by the £4bn to £5bn of planned investment by the Heritage Fund in the next two decades. His speech promised a discussion about how people, places and partnerships could help us achieve change across the UK.
- 1.4 This research on public perceptions of heritage is designed to help the Heritage Fund to start that discussion, by understanding the perceptions and opinions of the public and the heritage sector more specifically.
- 1.5 We are looking to gather insights into the public relationship to, and perceptions of heritage alongside stakeholder views. Supporting the focus on place, a key part of this will be to examine the contribution of heritage to where people live.

#### **1.6 Aims and Objectives**

This research has two main strands, with the overarching aim to find out how the Heritage Fund can support the UK's heritage over the next 10 years.

##### **Strand One – Public Perceptions of Heritage**

- To investigate and present the current position on UK-wide public perceptions of and sentiment towards heritage.

- To understand how attitudes to heritage have changed due to the impact of COVID-19
- To examine how people relate to heritage in their local area.
- To understand views on how public bodies should decide which geographic areas should be prioritised for funding
- To find out the public view on the importance of heritage including what should be prioritised for support by public bodies

## **Strand Two – Priorities for Heritage**

- To understand what high level changes and developments organisations working in heritage anticipate for the next 10 years.
- To find out how well the Heritage Fund's priorities are aligned with the current needs and priorities of organisations working in the heritage sector, and how these will need to change over the next 5-10 years.
- To understand heritage organisations' priorities for Lottery funding including, for example:
  - Balance of local vs national projects
  - Balance of targeted and open funding
- To understand organisations' attitudes to the Heritage Fund's taking a place-based approach to funding including:
  - what heritage can bring on a regional/country and local/community level over the next 5-10 years.
  - how geographic areas should be supported and/or prioritised for funding
- To test the Heritage Fund's current framework of objectives and outcomes to determine which continue to represent priorities for heritage.
- To understand what role the Heritage Fund can play, beyond the distribution of Lottery funding, to best support the UK's heritage

The research will need to cover the full breadth of the UK's heritage, including:

- Areas, buildings and monuments
- Community heritage
- Cultures and memories
- Industrial, maritime and transport
- Landscapes, parks and nature
- Museums, libraries and archives

## **1.7 Target Audience**

For the public elements of the research, the Heritage Fund is looking to understand the views of the UK population further segmented into:

- Each of the regions and nations of the UK
- Additional segmentation by demographic.

The Heritage Fund will run recruitment for stakeholder workshops for the appointed supplier. In doing so the Heritage Fund will seek to get a balance of organisations representing a range of different backgrounds and expertise across:

- Heritage type
- Organisation type
- Organisations led by under-served groups
- Different locations across the UK

## **2 Method**

The Heritage Fund are currently conducting early stage internal and horizon-scanning research, and will also be running some open consultation activity through the Heritage Fund website.

This consultation with the public and sector stakeholders will need to be informed by, and build on, the outputs of this work. These outputs will be made available to the successful supplier at inception stage.

All research strands should feed into a final report to include a complete analysis of findings. The contents structure of the report to be agreed in advance of writing.

### **Survey**

We expect strand one (public perceptions of heritage) to be primarily delivered through a survey, likely an addition to an existing omnibus or panel. This survey would need to generate a large number of responses in order to give findings based on the UK population, to be further segmented as detailed above.

The Heritage Fund can provide any text required for wider context to supplement the survey.

The consultant will need to undertake the following tasks as part of the contract:

- Design of questionnaire and writing survey questions, to be agreed with the Heritage Fund.
- Confirmation of survey methods and interaction with any wider omnibus.
- Collation and analysis of responses received. We would envisage the work involving tracking and monitoring responses from respondents across a range of demographics and targeting responses to ensure a good spread.

The survey must also be delivered in Welsh.

### **Workshops and Interviews - Public**

The public survey should be complemented by qualitative research. The Heritage Fund are open to suppliers proposals for how this might work, but could include, for example:

- A series of interviews to explore key themes in more depth, such as people's relationships with heritage in their local area.

- A series of workshops / focus groups, each focussing on a specific geographic area.
- The supplier will be required to recruit participants for this strand.

Workshops and interviews taking place in Wales will need to make provision for delivery in Welsh.

### **Workshops – Heritage Stakeholders**

The research with the UK public should be supplemented by the heritage sector stakeholder view, forming strand two of this work – priorities for heritage.

This workshop strand involves designing and running a short series of workshops with a range of heritage organisations from across the UK.

The Heritage Fund can support recruitment to these workshops through our main website and through Heritage Pulse, a panel of organisations from across the UK who have signed up to participate in the Heritage Fund's research activity.

Suppliers are required to outline how they would run the workshops.

## **3 Outputs**

3.1 The following outputs will be required:

- a draft final report in word;
- a final report in word; and
- a set of research data, to be stored in a readily accessible electronic format such as Excel

3.2 A project plan with specific deliverables\* and timetable will be agreed with the successful consultant. However, The National Lottery Heritage Fund expects the following deliverables in accordance with the following timetable as a minimum:

<b>Deliverable/Key Milestones*</b>	<b>Due date</b>
Project Initiation Document, including evaluation plan and methodology, timelines and dependencies.	Within one week of project initiation.
Inception Meeting to agree plans.	Within one week of project initiation.
Survey	Delivered during August 2022
Public Workshops / Interviews	Delivered during August 2022
Stakeholder Workshops	Delivered during August 2022
Draft report	26 August 2022

A final report with structure agreed with the Heritage Fund, and accompanying slide deck.	9 September 2022
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The above represents our minimum requirements.

\* The Heritage Fund reserves the right to amend this timetable where required.

- 3.3 All reports must adhere to The Fund's accessibility and formatting guidance (appended). We also expect reports to follow a layout agreed with The Fund in advance of submission of any reports.
- 3.4 We expect all our evaluations and research projects to generate evidence about the inclusivity of our funding and our performance in addressing inequality. Bidders must be committed to this principle and ensure evidence gathering addresses this requirement.
- 3.5 The initial findings will be confidential to The Fund. The Fund may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.
- 3.6 All reports to include appendices as agreed between The Fund and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in electronic format and hard copy if requested.
- 3.7 The successful bidder must comply with all of the requirements of UK and European Data Protection Laws and shall ensure appropriate research consents from interviews or any data collection.
- 3.8 The successful bidder will be expected to discuss and present findings at appropriate times, to internal and external audiences, including our Board, our Senior Management Team, Grantees, policy makers and other external stakeholders. The purpose of these presentations is to enable lessons to be learned and key policy and practice issues to be highlighted as the evaluation progresses.
- 3.9 We expect all projects we fund to adhere to the Social Research Association (SRA) ethical guidelines. If your proposal raises particular ethical issues, you must indicate what they are and what your strategy for addressing them is.

#### **4 Contract management & Payment Schedule**

- 4.1 We expect the research/evaluation to begin in the week commencing 18 July and be completed by 9 September. The draft report shall be submitted to the Fund by 26 August and the final report by 9 September.
- 4.2 The maximum budget is £85,000 to include all expenses and VAT. The contract will be let by the trustees of The National Heritage Memorial Fund.
- 4.3 The payment schedule will be:
  - 25% on agreement of research materials (survey and workshop plans)
  - 25 on submission of draft findings

- 50% on completion of final report
- 4.4 The contract will be based on The Fund's standard terms and conditions.
- 4.5 The research will be managed on a day to day basis for The Fund by Catherine Elvin, Insight Manager.

## Appendix I

The current Strategic Funding Framework objectives and outcomes are detail in the table below.

In February 2021 we agreed to introduce priority outcomes for 2021/22 (indicated in bold above) to support the contribution heritage makes to the UK's social and economic recovery from Covid-19. The Board agreed to continue these priority outcomes into 2022/23.

We have also strengthened our focus on environmental sustainability since we launched the SFF in 2019, in line with the urgency of the climate crisis.

<b>Strategic objective</b>	<b>Outcome</b>
Continue to bring heritage into better condition	Heritage will be in better condition
Inspire people to value heritage more	Heritage will be identified and better explained
Ensure that heritage is inclusive	<b>A wider range of people will be involved in heritage</b>
Support the organisations we fund to be more robust, enterprising, and forward looking	<b>The funded organisation will be more resilient</b>
Demonstrate how heritage helps people and places to thrive	<b>People will have developed skills</b>  People will have learnt about heritage, leading to change in ideas and actions  <b>People will have greater wellbeing</b>  <b>The local area will be a better place to live, work or visit</b>
Grow the contribution that heritage makes to the UK economy.	<b>The local economy will be boosted</b>



## Appendix II: Accessibility and formatting guidance

The National Lottery Heritage Fund is committed to providing a website that is accessible to the widest possible audience. Our site is annually tested by accessibility auditors and we must meet a AA compliance level. Our accessibility testing encompasses not just site functionality and design but all of our content, including downloadable documents.

Reports and other documents created for The Fund (**including the tender submissions**) 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. Best practice in accessibility is summarised below:

### Readability

In **reports**, and all other documents that may be published online including the **tender submission** consultants should ensure that:

- The size of the font is at least 12pt;
- 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
- 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](#).

### 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. Heading styles should follow on from each other i.e. Heading 1 then Heading 2.

#### 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 in-line 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 be simple and include a descriptive title. The header row should be identified and there shouldn't be more than one title row in a table. There should be no merged or blank cells.

**Additional documents**

Any additional information, separate to the report, for example proformas and transcripts which 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 The Fund. Our logo can be found on The [Fund's website](#).

**Further resources**

Please refer to the WCAG 2.0 article on [PDF techniques](#) for further information.

**Submitting your report to The Fund**

Please check the accessibility of your document using the Word accessibility checker before submitting: File – Info – Check for Issues – Check Accessibility.

Please submit your document as a Word file.

The Fund retains the right to amend documents in order to create accessible versions for publishing.