



Invitation to Tender

Government and Parliamentary support service - Scotland - July 2015

Organisation	National Heritage Memorial Fund (NHMF) / Heritage Lottery Fund (HLF)
Procurement title	Government and Parliamentary support service - Scotland
Brief description of supply	In general, the role includes intelligence and information gathering; analysis of key issues and themes; providing information and advice to HLF.
Tender start date	8 May 2015
Estimated value of tender	£12,500 p.a (inclusive of VAT)
Planned date of award	Week commencing 22 June 2015
Estimated length of contract	1 July 2015 for up to 3 years. A formal review will take place in July 2016.
Contact name and email address	Jon Armstrong Head of Government & Parliamentary Relations iona@hlf.org.uk or: Colin McLean Head of HLF, Scotland colinm@hlf.org.uk
Timetable and process for procurement	Completed proposal to be returned to HLF by 12.00pm on Tuesday 26 May 2015

Shortlisted candidates will be invited to interview in Edinburgh on 17 & 18 June

Separately, we are also inviting tenders for a communications and media relations support contract. We would be interested to hear from service providers that feel they could deliver both services. Details of this tender can also be found on the HLF website.

Invitation to tender – Government and Parliamentary support (Scotland)

About the Heritage Lottery Fund (HLF)

The National Heritage Memorial Fund / HLF is a non-departmental public body, sponsored by the Department of Culture Media and Sport and operating across all countries in the UK. In Scotland, HLF works closely with the Scottish Government and works to Policy Directions agreed with the Minister that leads on Lottery issues in Scotland, as well as within its UK Government Policy and Financial Directions, set by DCMS.

Since its launch 20 years ago, The National Lottery has raised over £33billion of income for the good causes, supporting over 45,000 individual projects. The HLF currently receives 20% of National Lottery good causes income, with the same share going to Arts and to Sport and the remaining 40% distributed by the Big Lottery Fund.

National Lottery funding is sustaining and transforming the UK's heritage, rescuing thousands of buildings and places from decay, breathing new life into neglected collections, parks and landscapes, protecting threatened habitats and species, and inspiring communities to record and celebrate their cultures and memories. Since 1994, this investment has truly broadened the horizons of heritage, ensuring that people from all communities see their heritage reflected in our national story.

Today, heritage projects are inspiring new generations of young people to learn and get involved, providing fulfilling opportunities to volunteer and develop skills, and creating thousands of opportunities for an enjoyable day out. At the heart of today's tourism industry, Britain's revitalised heritage attracts overseas visitors and brings investment into local economies. HLF-funded projects have created over 30,000 jobs in heritage tourism and every £1million of HLF funding leads to an increase in tourism revenues for regional economies of £4.2million over the subsequent 10 years.

Using money raised through the National Lottery, heritage projects are re-energising neglected areas across the UK, creating distinctive and vibrant places to live and work, and fostering a sense of community. Thanks to National Lottery players, the Heritage Lottery Fund is currently able to invest around £400million each year to continue making a lasting difference for heritage, people and communities across the UK.

In awarding grants, our goal is to make a lasting difference for heritage and people. Our strategic framework for 2013-2018 identifies the range of outcomes that we want to achieve with our funding and the context for our investment in heritage. The framework, designed to deliver long term and sustainable benefits, has been developed in response to the needs and pressures facing the heritage sector but provides the flexibility to allow us to respond to changing circumstances.

In Scotland we have distributed over £740 million to over 3,700 projects ranging from the award winning Riverside Museum in Glasgow, the state-of-the-art Bannockburn Visitor centre near Stirling and the Scottish National Portrait Gallery in the nation's capital. Historic townscapes from Stornoway in the Western Isles to Glasgow's historic Merchant City have been regenerated with HLF support. Smaller communities have also benefited across Scotland through a range of projects which conserve and share heritage at a very local level – sharing stories of Scotland's industrial past, capturing memories of the impact of the First World War across Scottish communities, and young people learning traditional boat building skills. We have funded 25 historic parks from Aberdeen to Dundee, as well as preserving and protecting Scotland's outstanding natural heritage including the woodlands of Loch Lomond, the rugged beauty of the Trossachs and Cairngorms and the unique character of the Orkney Islands.

Further details about the Heritage Lottery Fund, including further information about the funding available and our strategic framework can be found on www.hlf.org.uk.

Required Services- Government and Parliamentary Relations support service in Scotland

HLF is seeking a service provider that will deliver the communications support services in Scotland as set out below:

HLF Communications Objectives

To promote funding opportunities and the positive difference that Lottery funding for heritage is making for heritage, people and communities in Scotland:

- To maximise positive profile for HLF's activities in Scotland, accounting publicly for our work by providing creative integrated communications support (print/broadcast/social) for regular grant making and other potential news generating activities (e.g. project openings).
- To recognise and create opportunities to promote corporate HLF themes in a Scottish context, demonstrating the value of heritage in today's society – these may be issue-based, pro-active opportunities, rather than news. Creative ideas here will be welcomed.
- To provide communications support for outreach work in under-funded areas / sectors.
- To demonstrate the positive impact and difference that National Lottery funding is making to Scotland's heritage, people and communities.
- To communicate how HLF's flexible and supportive approach, helps heritage organisations address the most pressing challenges and exciting opportunities which present themselves.
- To demonstrate that lottery funding for heritage adds value to local, national and UK wide public policy agendas.

HLF Positioning and key messages

Corporate positioning

- HLF invests National Lottery money to transform and sustain the UK's heritage for all people
- HLF's funding creates a lasting difference for heritage; and
- HLF helps people get involved in the UK's heritage, making a positive impact for us all.

Primary Positioning

- **Trust** – Over the last 20 years HLF has been trusted by the public, stakeholders, and Governments across the UK to distribute National Lottery money to successful projects.
- **Expertise** – HLF is an expert grant maker experienced in ensuring that its funding achieves great results. HLF's role and expertise are widely recognised across the Scottish heritage sector.
- **Enabling** – Over 20 years, HLF has developed relationships, skills and means to encourage collaborations which improve heritage for people across the UK.
- **Impact** – No one else has invested more into transforming our heritage.
- **Future** – As the single most important source of funding HLF will continue to unlock the potential of the UK's heritage.

Key themes for 2015 / 2016:

- Economic growth, (including economic regeneration and green growth; tourism);
- Communities (demonstrating the value of heritage to communities of place, social/cultural and shared interest
- Building awareness of HLF's small grant programme – "Sharing Heritage" (£3k - £10k) and "Our Heritage" (£10k to £100k) – to stimulate interest and an increase in applications from existing and new audiences
- Future generations (including young people, sustainability and legacy).

Supplementary themes / opportunities:

- HLF is placing significant importance on the anniversaries of the First World War (2014 – 2019).
- In 2015/16 we wish to increase awareness of the value and breadth of HLF funding to Scottish landscape and biodiversity and wildlife; and
- The National Lottery celebrates its 21st birthday in 2015.
- We are looking at opportunities to promote the awareness of grants to support 'intangible' heritage – stories and memories

Scope of Required Services – Overview of core work

Government & Parliamentary Relations

- HLF's Government & Parliamentary Relations (GPR) team who are placing this contract, are based in our London offices. The majority of working contact would be with the HLF Scotland Team (in particular the Head of HLF Scotland), based in Scotland, but working closely with the GPR team, specifically the Head of Government & Parliamentary Relations.
- HLF is therefore looking to appoint an agency / contractor to assist our GPR team, Senior Management and HLF Scotland team with:

Intelligence and advice on:

- HLF's contact management strategy for the whole of Scotland and issue management for its priority areas in Scotland.
- Priority issues for the Scottish Government with a particular impact on HLF, including culture and heritage, regeneration, economy and growth, tourism, skills, young people.
- The impact of Westminster/Whitehall decisions and wider political issues (e.g. post-election impact on independence / devolution in Scotland, role of SNP at Westminster) on HLF presence and profile with political stakeholders in Scotland.
- Engagement with the UK Government where relevant, including key Ministerial targets after the 2015 General Election.
- Engagement with Scottish Government where relevant, including key Ministerial targets.
- How to engage new members of Parliament in Scotland after the 2015 General Election and on-going programme of engagement with MSPs, especially in build up to 2016 election.

Additional and ad hoc advice on:

- Accounting effectively for the HLF's management of public and lottery funds with the Scottish Government and wider political stakeholders.
- Ensuring that HLF's first-hand expertise of distributing Lottery money to Scotland's diverse heritage is called upon in the development and implementation of policy.
- Raising HLF's profile, building relationships and communicating effectively with other key political stakeholders, at local, national and UK level.
- Responding effectively to legislation (including at pre-legislation stage), committee inquiries, MSP, MP and officer questions etc.
- Issue and crisis management, including major grant announcements, grant rejections etc.
- Advice and background support on events and engagement activity.

Audience

The primary audience we want to connect and communicate with through this contract is:

- the Scottish Government (especially its relevant departments and officials and focusing on Ministers);
- Members of the Scottish Parliament and the wider political scene.; and
- Scottish Members of the UK Parliament and relevant UK Government Departments.

Recognising that GPR also play a role more widely with media and communities, we will also want to inform stakeholders in the heritage sector, opinion-formers and decision-makers to demonstrate the positive contribution that heritage projects have on our society.

Managing the contract and administration

HLF will be looking for value for money and that the majority of available contract time is directed to delivering core activity. Time allocated for administering the account should be kept to a minimum.

- **Attendance at regular meetings** - including contributing to meeting agendas, recording and circulating actions and contributing to forward planning.

- **Availability by phone / email support** – to Head of HLF and Development Manager in Scotland and Head of GPR at HQ.
- Completion of quarterly timesheet.

Contract management and reporting lines

The contractor / agency will work closely on a regular basis with the Head of Scotland and Development Manager. As budget holder, the Contractor will report to – and consult with - the Head of Government & Parliamentary Relations and Government and Parliamentary Relations Manager, based in London.

How we work

Probity and transparency are extremely important to HLF, as a non-departmental public body. Public affairs agencies retained by HLF should not communicate directly with stakeholders on behalf of HLF, nor act as a proxy for HLF. Where repeated administrative contact is necessary with an office, i.e. to arrange an event, it may on rare occasions be appropriate for this to be handled by the agency. However, the norm would be for HLF to lead on direct contact and varying from this practice should be agreed with the Head of Government and Parliamentary Relations in advance and should follow initial contact from HLF. Agencies should not attend one-to-one meetings with politicians on official HLF business.

Managing potential conflicts of interest

We would require information of any recent work you have carried out for other Lottery, heritage or similar bodies in Scotland in the last 2 years. As part of the professional delivery of HLF's communications strategy we would require the chosen Government & Parliamentary Relations service to give us advance warning in writing if bidding for similar work with other Lottery or heritage bodies, or any other work that might pose potential conflict of interest with the HLF brief in Scotland.

Budget

There is a maximum budget of up to £12,500 (including VAT) per annum for the delivery of this contract. Please note that detailed terms and conditions will be discussed and agreed with the successful contractor / agency, prior to appointment and subject to satisfactory references, where appropriate.

Contract

It is likely that the contract will begin on 1st July 2015 and will run for up to 3 years from this date. The contract can be terminated at three months notice by either party and a formal review will take place at the end of the first year. The contract will be let by the National Heritage Memorial Fund (NHMF) / Heritage Lottery Fund.

Tax Compliance

Heritage Lottery Fund (HLF) is required by the Cabinet Office to seek formal assurance from contractors providing services to HLF with off payroll arrangements lasting more than six months and costing over £220 per day that income tax and national insurance obligations are being met.

To enable us to meet this requirement our contract with you/your company will contain the following contractual provisions:

“It is hereby declared that it is the intention of the parties that this Contract is a contract for Services and the Service Provider shall be responsible for all income tax liabilities and National Insurance or similar contributions in respect of the fees payable under this Contract and the Service Provider hereby indemnifies the Heritage Lottery Fund in respect of any claims that may be made by the relevant authorities against the Heritage Lottery Fund in respect of income tax or National Insurance or similar contributions relating to the performance of the Services hereunder. The Heritage Lottery Fund may, at any time during the term of the Contract, request the Service Provider to provide the information which demonstrates how the Service Provider or its

Consultant comply with this condition or why this condition does not apply to them. If applicable, the Service Provider shall flow these terms down to the Consultant with whom it contracts. The Heritage Lottery Fund has a right to terminate this Contract if (a) the Service Provider fails to provide the information in response to the request within a reasonable time or the information provided is inadequate to demonstrate compliance with this condition; (b) the specified information requested was not provided within the specified period; (c) or the information provided demonstrates that the Service Provider or its Consultant is not complying with terms of this condition. This condition is required to enable the Heritage Lottery Fund to comply with the requirements of Procurement Policy Note 07/12 (issued by the Cabinet Office)."

Living Wage

As part of our wider approach to corporate social responsibility, the HLF prefers our business partners to have similar values to our own. We pay all our staff no less than the living wage (in London and throughout the UK), and we would like our suppliers and contractors to do likewise. Please highlight in your proposal whether you do pay your staff the living wage.

Award criteria

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.

Tenders submitted will be assessed against the following **Quality Questions**:

- Please demonstrate that you have significant knowledge of the heritage and cultural sectors in Scotland, National Lottery and/or grant-giving sector.
- Please set out your proposal to meet our requirements for HLF Government and Parliamentary Relations support services as set out above including but not limited to:
 - your creative approaches
 - Added value ideas that can be brought to the contract and in delivering HLFs communications objectives throughout the term of the contract, in a political context.
- Please set out your proposal on how you plan to provide digital and social media support / advice to HLF in a political context
- Please detail your delivery team which you propose to deliver the services under the Contract and set out how:
 - your team would approach the requirements of this Contract.
 - you ensure you have adequate resources in terms of relevant skills and experience to meet our requirements and your delivery team is able to deliver the contract

Quality Questions scoring methodology

Score	Grade	Comment
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. Exceeds 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. Exceeds the HLF's requirements in most respects.

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

Price Criterion: 30%

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. ($8/100 \times 30 = 2.4$ marks; $30 - 2.4 = 27.6$ marks)

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.

Notes: The HLF reserves the right to reject abnormally low tenders.

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.

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 on a weekly / monthly basis.

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.

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)		e.g. Project Manager/ Director	e.g. Senior Consultant/ manager/ researcher	Junior Consultant/ equivalent	Total days	Total fees
		e.g. £500	e.g. £300	e.g. £200		
	<i>Quantity</i>					
Inception meeting to agree plans and finalise req'ments with the Fund	1	e.g. 0.5	1	1.5	3	850
<i>[Add as necessary]</i>						
<i>[Add as necessary]</i>						
<i>[Add as necessary]</i>						
Expenses						
Travel and subsistence						
Sub-total						
VAT						
Total Costs including VAT and expenses (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)						

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.

* The HLF reserve the right to amend this timetable where required.

We are offering this contract as a competitive tender and are inviting interested candidates to submit bids. The proposal for undertaking the work should take the form of a full written proposal to describe in detail how the contract will be delivered including:

- your responses on all Quality Questions;
- completed Schedule of Charges;
- indication whether you fall under the definition of a small or medium sized enterprise

Tenders received after that time will not be considered and it is your responsibility to ensure the tender is submitted in a zip file and that we have received it. If you do not submit the information in this way it may be too large for our email inbox and we will not receive it.

By submitting a tender, the Bidder agrees to keep that tender open for acceptance by the Heritage Lottery Fund for 60 days following the closing date for submission of tenders.

HLF reserves the right not to appoint and to achieve the outcomes of this support through other methods. Please note that as part of public sector transparency requirements, the contract with the winning bidder will be posted online, including summarised information about costs. HLF does not bind itself to award a contract or contracts and shall not be liable for any costs incurred in the production or submission of ITT. Under no circumstances will the Heritage Lottery Fund or any of its advisers be liable for any costs or expenses incurred by Bidders and/or their members in this procurement.

The procurement timetable will be:

- Completed proposal to be returned to HLF by 12pm on **26 May 2015**
- Presentation / interview in Scotland on either **17 or 18 June 2015**
- Confirmation of award of contract by **22 June 2015**
- Contract start: **1 July 2015**

Proposals can be sent electronically or in hard copy to:

Jon Armstrong
Head of Government & Parliamentary Relations
Heritage Lottery Fund,
7, Holbein Place
London
SW1W8NR

Email: jon@hlf.org.uk