# State of UK Public Parks II

**Organisation: Heritage Lottery Fund**

**Department:** Strategy and Business Development

**Title of procurement: State of UK Public Parks II Research**

**Brief description of supply:** Research report and advocacy document

**Estimated value of tender:** up to£50,000

**Estimated duration:** February - July 2016

**Name of HLF Contact:** Drew Bennellick, Head of Landscape & Natural Heritage

**Timetable** Response deadline: 12 noon Friday12 February 2016

Clarification meetings: Tuesday 23 February 2016

 Contract commencement date: End of February 2016

# Overview

* 1. The Heritage Lottery Fund (HLF) was created 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. In July 2014 HLF published our first ever State of UK Public Parks report. The detailed research report and accompanying advocacy document, based on extensive new survey material and wider recently published evidence, set out the current and predicted position of funding for public parks in the UK.
	4. The first State of Parks report has clearly positioned HLF as a leading advocate on the state of management and funding of parks in the UK partly due to the comprehensive and authorattive nature of the study but also as no other body currently exists able to take a UK-wide and specific focus on parks and green spaces. The earlier report, 18 months after publication, is still regularly cited in the national press and HLF still sees a need to fund and lead the production of definitive data and evidence on the state of this sector.

# Scope of Requirements and Purpose of the research

* 1. Under this ITT HLF would now like to procure the service provider that will provide a second State of UK Public Parks report to:
* provide a comparative update on the data published in the July 2014 report,
* provide real life case studies to illustrate negative and positive examples of the way funding and changes to management is impacting upon parks, people and local communities,
* report on progress in achieving the actions identified in our first report and where relevant propose new actions,
* provide an updated evidence base that can be used as an evidence base by HLF and a wide range of organisations interested in promoting the values of public parks.
	1. The research report will be used by HLF to promote the value of public parks to the widest possible audience, but crucially will help HLF and Big Lottery Fund protect of our past investments in public parks and provide direction in how we might best support parks and the sector in future. The commission requires the production of two documents, a detailed research report and a shorter punchy advocacy document. The main audience for the advocacy document will be:-
* Decision makers including both local and national politicians,
* Parks and green space professionals,
* The public including community groups,
* Charities including social and environmental organisations,
* The business world.
	1. The research will be used to inform our position on parks, to identify how HLF and BLF might be best placed to support parks and green spaces in future, and provide a valuable resource to all those with an interest in parks.
	2. The aim of this research must be to update on progress, or regression, since the last study but we are keen this report is more illustrative of what is actually happening on the ground, what changes are happening (both positive and negative), where tensions lie between management/funding/use, and how changes are particularly impacting upon people and local communities. Evidence for the latter may be more difficult to obtain but we are keen to explore what might be possible may be focussing on particular geographic areas or local authorities. During research for the first report many local authorities were anxious not to be named or shamed but we believe some are now past that point and keen to explain why parks may be suffering and the difficult funding choices they are being forced to make.
	3. HLF’s vision is that the State of UK Public Parks II will maintain our position as a champion for parks and green spaces, but more crucially will raise awareness of the plight of parks, their value to society and help ensure they are properly funded and protected for the immediate future.

# Requirements to Bidder’s Methodology

* 1. The research will require the commissioning of new evidence and preparation of case studies. Our aim is to re-run the previous surveys of all UK park managers and Friends groups undertaken in late 2013 but to simplify the questions to ensure an equally high response rate. There is already good evidence on the scale of cuts from recent survey undertaken by organisations such as APSE so we do not wish to duplicate that work. There is also current research underway led by Sheffield University looking at the nature of contracting within the parks sector.
	2. The successful service provider will be required to design and undertake a park managers and Friends groups surveys, to analyse the results and to form conclusions. The work must also include the harvesting of information to allow the development of a series of case studies that illustrate what is typically happening within the sector focusing on both the positive and negative. Positive features may include innovation, new partnerships, community engagement or new enterprises such as those featured in the *Rethinking Parks* programme led by Nesta. Negative features may include declining park quality, the sale of assets, loss of skills, community disengagement, a lack of strategic planning and loss of corporate support.
	3. The successful service provider will need to develop initial proposals for the above surveys which will be discussed and developed in association with the HLF project team. Reports analysing both surveys will be required for internal use only, and these will be used to create a detailed research report and the script for a punch advocacy document that will be designed and published by HLF.
	4. HLF is also keen to separately commission a short film outside of the contract procured under this ITT, as well as a public opinion poll to collect a wider public view. The opinion poll will be separately funded but the findings will need incorporation in to the final reports under this ITT. The successful service provider is therefore asked to allow time to help HLF frame approximately 5/8 questions to be used in the opinion poll and to review/analyse the data that is returned. It is estimated that the opinion poll would be of around 1,000 individuals selected from across the UK. The timing of the poll can be agreed once a successful service provider has been appointed.

# Outputs

* 1. The following outputs will be required to be provided by the successful service provider:
* two detailed analysis reports, one for the park managers survey and one for the Friends group survey (Word documents for HLF internal use only)
* a draft research report;
* a final research report as a Pdf and Word document;
* draft scripts and photographic images for the advocacy report;
* all data collected through the survey and case study work presented for loading on the HLF website (data will require a degree of anonomisation and will need to be supplied in a readily accessible electronic format such as Excel);
* an updated contacts database of those consulted through the two surveys.

All reports to include appendices as agreed between HLF and the successful service provider. The contents and structure of both reports must be agreed in advance of drafting.

* 1. **Reports and all other documents produced under this contract MUST adhere to HLF’s accessibility and formatting requirements (appended).**
	2. The successful service provider will be 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)).

# Contract term and budget

* 1. We expect the research to begin 26 Feb 2016 and be completed by 8 July 2016. The final report shall be submitted to HLF by 8 July 2016.
	2. The anticipated budget for this research is £50,000 to include all expenses and VAT. The contract will be let by the National Heritage Memorial Fund.
	3. The payment schedule will be:

First payment on approval of the two survey analysis reports – up to £10,000 inclusive VAT and expenses

Second payment on approval of a draft research report – up to £20,000 inclusive VAT and expenses

Final payment/remaining balance on approval of all final reports and data submission.

* 1. Please note that the contract will be based on the HLF standard terms and conditions available on the HLF website.

# Research management

* 1. The research will be managed on a day-to-day basis for HLF by Drew Bennellick, Head of Landscape & Natural Heritage, Heritage Lottery Fund.

# Award Criteria

* 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:

|  |  |  |
| --- | --- | --- |
|  | **Evaluation Criteria** **Quality: 70%** | **weighting** |
| Question 1 | Please demonstrate an understanding of this research brief and the issue it is focused on. Also please include at least two examples of previous relevant work to demonstrate how your expertise will benefit the delivery of research services under this ITT | **20** |
| Question 2 | Please provide detailed methodology for undertaking the research and; please detail your overall proposal to meet all requirements to the research as set out in this ITT  | **15** |
| Question 3 | Please provide your proposed project plan to deliver the research and a timescale for carrying out the research services  | **10** |
| Question 4 | Please provide details of your research team proposed to deliver the contract including their skills and expertise. Please also idendify the project manager / lead contact proposed from your end and specifythe allocation of days between proposed members of the team | **10** |

**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. |

* 1. 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, the number of staff and the amount of time that will be scheduled to work on the contract with the daily charging rate of the proposed members of your delivery team.

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: HLF reserves the right to reject abnormally low tenders. HLF reserves 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 cancel the tender.
	2. The procurement timetable will be:

# Tender return deadline: completed proposal to be returned to HLF by 12 noon on Friday12 February 2016.

# Clarification meetings may be held with top scoring bidders and would take place on Tuesday 23 February 2016

Please note:-

HLF reserves the right to carry out clarifications via email or by inviting Bidders to a clarification meeting.

In order to ensure that both the HLF’s and Bidder’s resources are used appropriately, HLF will only invite the top two or three (depending on the closeness of scores) highest scoring bidders to attend a clarification meeting.

Scores will be moderated based on any clarifications provided during this meeting.

* Outcome notification – end of February 2016.
	1. Your tender proposals must be sent electronically to the following e-mail - drewb@hlf.org.uk before the tender return deadline of **12 noon on Friday12 February 2016.**
	2. Please visit the [HLF website](http://www.hlf.org.uk/Pages/Home.aspx) for further information about the organisation and to see the State of UK Public Parks 2014 research report, data, advocacy report and film at <http://www.hlf.org.uk/state-uk-public-parks>
	3. To assist the bidders HLF confirms that we will provide the following information to the successful service provider at the start of contract:-

 Updated database of contacts for park managers in the UK

 Access, via the Federation of Parks Friends Group, to their members’ details

# 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).