**Arts Council England Invitation to Tender**

Title: Quality Metrics 2015/16 phase Evaluation

Reference number:**ART011-0074**

Deadline for receipt of tender proposals: **12 noon on 2 December 2015**

**Background**

***The Arts Council***

Arts Council England champions, develops and invests in artistic and cultural experiences that enrich people's lives.

We support a range of activities across the arts, museums and libraries - from theatre to digital art, reading to dance, music to literature, and crafts to collections.

Great art and culture inspires us, brings us together and teaches us about ourselves and the world around us. In short, it makes life better.

Between 2015 and 2018, we will invest £1.1 billion of public money from government and an estimated £700 million from the National Lottery to help create these experiences for as many people as possible across the country.

**Section 1: Introduction**

Arts Council England is seeking a service provider to deliver an evaluation of the national test phase of the Quality Metrics evaluation framework. This invitation to tender specifies the requirements for the provision of the evaluation.

The following further details are outlined in this document:

* The service to be provided
* The information to be provided by tenderers
* The terms of business relating to the award of any contract
* Anticipated timetable for the tendering programme

**Background**

Quality Metrics is a sector-led metrics framework that uses self, peer and public assessment to capture the quality of arts and cultural work. It takes its inspiration from a project initiated in 2010 by the [Department of Culture and the Arts in Western Australia](http://www.dca.wa.gov.au/research-hub/public-value/), which commissioned consultants John Knell of Intelligence Agency and Michael Chappell of Pracsys to work with arts organisations to develop a system that would help them understand the public value of arts and culture.

To date, the project has been supported through two pilots in England by the Arts Council. The [first pilot](http://www.artscouncil.org.uk/what-we-do/research-and-data/quality-work/quality-metrics/quality-metrics-pilot/) involved a consortium of Manchester arts and cultural organisations testing the viability of the framework, developing a set of metrics and testing them across 8 events. The [second pilot](http://artsdigitalrnd.org.uk/projects/cornerhouse-et-al/), funded through the Big Data strand of the Digital R&D fund for the arts and also led by the Manchester consortium, further developed the metrics themselves, the online platform and the technology that supports them.

Following the two successful pilots that tested the metrics with 8 and 20 organisations respectively, the Arts Council decided to offer a larger and more diverse number of portfolio organisations the chance to trial the framework.

**About the programme**

Arts Council England has awarded £300k to Counting What Counts ltd to enable 150 National Portfolio organisations and Major Partner Museums to test the Quality Metrics evaluation framework over three events, exhibitions and performances between November 2015 and May 2016. An additional 10 organisations will further develop and test a set of metric suitable for CYP and Participatory work. Details of the project are available on our [website](http://www.artscouncil.org.uk/what-we-do/research-and-data/quality-work/quality-metrics/measuring-quality-across-national-portfolio-organisations-and-ma/).

It is of strategic importance to the Arts Council that the organisations we fund have a greater understanding of what their peers and audiences value about their work and that they can use this understanding to improve the quality of their work, communicate more consistently about quality with their stakeholders and increase their resilience. Results from previous pilots suggest the quality metrics could help achieve these aims and the purpose of this trial is to test the framework at scale:

* To understand how suitable the framework is for the diverse range of organisations in our portfolio in terms of artform, location, size and diversity
* To understand how insightful and useful the data produced through the trial is to the organisations taking part, both on an individual and aggregated level
* To understand the different ways in which organisations could potentially use the data produced through the trial and any limitations
* To understand whether the self, audience and peer scores provide a consistent and reliable assessment of quality for the organisations taking part
* To understand how ready and willing organisations are to adopt the framework and how the Arts Council can support this
* To understand how the framework aligns with other tools and systems already in use by organisations in the portfolio

The Quality Metrics themselves are a core set of statements developed by arts and culture organisations that describe the components of quality artistic and cultural work. The metrics themselves are open source and for the duration of this project will be administered on a platform called [Culture Counts](https://culturecounts.cc/) which allows organisations to collect and analyse self, peer and audience feedback on events, exhibitions or performances.

Organisations wishing to take part in the trial were required to submit an expression of interest through the [Culture Counts](https://culturecounts.cc/expression-of-interest/) website between 1-23 October 2015. A copy of the expression of interest form, selection criteria and information for applicants is attached (see appendix A and B). 150 organisations have been accepted onto the trial.

The project will take place between October 2015 and June 2016 with organisations using the framework to evaluate events between November 2015 and May 2016. Counting What Counts Ltd will provide a final report and aggregated data set by the end of June 2016.

Key milestones are

|  |  |
| --- | --- |
| 4 December 2015 | Majority of organisations enrolled onto Culture Counts |
| 19 February January 2016 | Majority of organisations to have evaluated 1 event |
| 31 March 2016 | Majority of organisations to have evaluated 3 events |
| 31 May 2016 | All organisations to have evaluated 3 events |
| 30 June 2016 | Final report and aggregated data set produced by Counting What Counts Ltd |

**Related programmes**

Artistic and Quality Assessment Programme

The Arts Council runs an [artistic and quality assessment](http://www.artscouncil.org.uk/funding/apply-funding/funding-programmes/national-portfolio-2015-18/artistic-assessment/) programme to provide a fair, robust and transparent platform for discussions about the quality of work produced by NPO/MPMs. A number of our artistic and quality assessors will complete quality metrics surveys alongside their standard narrative assessments for organisations taking part in this trial in order to allow us to compare the responses of self-selected and independent peers.

Quality Principles

Seven quality principles have been developed as a result of close collaboration between the Arts Council England and arts and cultural organisations that work with children and young people. The aim of the [quality principles](http://www.artscouncil.org.uk/what-we-do/cyp/resources/quality-principles/) work is to raise the standard of work being produced by, with and for children and young people. We recently [published a report](http://www.artscouncil.org.uk/advice-and-guidance/browse-advice-and-guidance/developing-participatory-metrics) of a project in which a set of CYP/Participatory metrics began to be developed and aligned with the quality principles. Alignment between the quality metrics and quality principles will be further explored through this project.

Audience Finder

The Arts Council funds The Audience Agency to deliver an audience insight tool called [Audience Finder](http://audiencefinder.org/) which all NPOs are required to sign up to by April 2016. Audience Finder requires organisations to collect data from their audiences in relation to demographics, reasons for attending and quality of experience. Data is collected through a combination of box office information and audience surveys.

**Aims of the evaluation**

Understanding the quality of arts and cultural experiences is complex, and the breadth of activity being delivered by our portfolio of organisations is extremely varied. We support a broad range of art forms and museums, to deliver a diverse range of work and cultural experiences. Audiences and visitors engage with arts and culture in many different ways, from attendance at events and exhibitions, to immersive participation to co-creation. More information about our 663 National Portfolio Organisations and 21 Major Partner Museums is available on our [website](http://artscouncil.org.uk/funding/our-investment-2015-18/).

Our overall aim for this evaluation contract is to determine whether the Quality Metrics evaluation framework is a suitable and appropriate means of assessing and demonstrating artistic quality for the diverse range of national portfolio organisations and major partner museums within our portfolio. We also want to understand the general sector temperature towards adopting the framework and what next steps the arts council should take in supporting the sector to better understand the quality of its work.

We will use the findings from the evaluation to inform decisions around whether to roll the framework out across our wider national portfolio in future years, and if so, how we might do it. The evaluation will also inform a feasibility study we are carrying out to understand how we could integrate the Quality Metrics with our existing systems and processes.

**Evaluation questions**

How have organisations experience of Culture Counts in this trial enabled them to better understand the quality of their work?

* What factors affected organisations experience in the trial?
* What factors determined whether or not organisations expressed an interest in taking part in the trial?
* How insightful and useful was the data produced through the trial for the organisations involved ?
* Do the sample sizes suggest any limitations to the understanding that can be drawn from the data?
* How did organisations feel about sharing their data across the cohort of organisations involved in the trial?
* For what purpose have organisations used the audience data collected through the trial?
* How do organisations envisage using the information gained from the trial?
* How suitable have the quality metrics, the framework and the system proved to be for organisations and audiences taking part in the trial, and how does this vary across the different groups (e.g. organisational size, location, artform)?
* How practical was it for organisations to self-manage the peer and audience assessment process and what was their experience of persuading audiences and peers to complete the surveys?
* Did organisations feel that peers and audiences found it easy to complete the surveys?

Are the Quality Metrics, the evaluation framework and the Culture Counts platform suitable mechanisms for understanding quality for our organisations?

* Are the quality metrics an appropriate means of assessing artistic quality for the diverse range of organisations in our portfolio?
* What are the strengths and weaknesses of the Quality Metrics evaluation framework?
* How useful do organisations find the self, peer and public comparison?
* Is the Culture Counts platform a practical and efficient way for our NPO/MPM organisations to use the framework?
* Is there value in the quality metrics framework for the Arts Council?

What is the attitude of organisations towards the framework? What are their key concerns, and how might ACE address these in any future roll-out?

* To what extent and under what conditions would organisations be ready and willing to adopt the framework in the future?
* What would be the main factors deterring organisations from wanting to adopt the framework?
* What are the resource implications for organisations adopting the framework?
* How would organisations like to see the Arts Council use the framework?
* To what extent and with whom would organisations be prepared to share their data?
* To what extent are audiences willing to use the framework to evaluate work they have experienced?
* To what extent are peers willing to use the framework to evaluate work they have experienced?
* What are organisations perceptions about what the quality metrics framework does?

How does the quality metrics evaluation framework align with related systems, tools and frameworks?

* How do organisations perceive the value and usefulness of the arts council’s artistic and quality assessment programme in helping them to reflect and report on the quality of the work they are producing?
* How do organisations perceive the value and usefulness of the quality principles in helping them to reflect and report on the quality of the work they are producing?
* Would there be merit in aligning or integrating the quality metrics evaluation framework with the artistic and quality assessment programme and quality principles?
* What is the experience for organisations using Culture Counts alongside any existing approaches to evaluation and data collection they may apply?
* Has the use of Culture Counts alongside Audience Finder caused confusion for organisations using both systems?
* Do the quality metrics practically provide different information from other systems and tools in use and how do they compare?
* What are the possibilities for interoperability between Culture Counts and other systems and databases such as Audience Finder and would there be merit in the arts council exploring these further?

**Outputs and timeline**

|  |  |
| --- | --- |
| **Output** | **Timeline** |
| Inception meeting | 5 January 2016 |
| Updates on the progress of the services (by phone/email as required by ACE) | TBC at inception meeting |
| Presentation of mid-way findings | 30 March 2016 |
| Final draft report and outputs | 15 June 2016 |
| Final report | 30 June 2016 |

The final report should adhere to the Arts Council’s accessibility and formatting guidance. Arts Council England will own any materials created for this contract.

**Method**

We would like this evaluation to provide a balance of findings in terms of breadth across the programme, and depth to highlight and explore key issues in greater detail. We therefore require a mixed method approach to this evaluation, and would like bidders to propose a research methodology that they believe will best meet the aims of the brief.

This should include light touch surveys with all organisations taking part in the trial, interviews and/or focus groups with organisations taking part, surveys/interviews with a sample of organisations that chose not to take part, interviews with Counting What Counts Ltd, other service providers such as The Audience Agency, self-selected and independent peers and some consultation with audiences at events where the framework is in use.

Arts Council England can provide the successful bidder with contact information for the organisations taking part in the trial and a small sample of relevant organisations who chose not to take part.

**Duration of Contract**

The period of the contract is 12 January 2016 to 30 June 2016

**Procurement and Project Timeline**

The indicative timetable for the project is:

|  |  |
| --- | --- |
| **Activity** | **Date** |
| Issue ITT | 18 November 2015 |
| Deadline for clarification questions | 24 November 2015 |
| Deadline for receipt of tender proposals | 12 noon on 2 December 2015 |
| Initial review of tenders | 7 December 2015 |
| Possible clarification meetings | 14 December 2015 |
| Moderate/Finalise scores and identify preferred bidder | 16 December 2015 |
| Contract award | 18 December 2015 |
| Pre Contract Inception meeting | 5 January 2016 |
| Contract commencement | 12 January 2016 |

**Useful weblinks**

* Please refer to our [brand guidelines](http://www.artscouncil.org.uk/who-we-are/supplying-arts-council/brand-identity-guidelines/)

**Escalation Procedures**

In the event of a major problem, a list of contacts will be required to manage any problem to a successful conclusion.

**Account Management**

In performing the services required under this contract the supplier will report to Carl Stevens, Senior Officer, Projects. Please specify in your proposal the named individual who will be responsible for the account management of this contract on behalf of your organisation.

The programme of work will be overseen and guided by Simon Mellor, Executive Director, Arts and Culture

**Management reporting/review meetings**

**Pricing/Budget**

The budget available for this project is between £27,000 and £30,000 inclusive of VAT and all travel and other expenses. **Bids which exceed £30,000 inclusive of VAT and all expenses will be excluded from this procurement exercise as being unaffordable.** Value for money is a key element of the evaluation criteria.

**Payment Structure and billing requirements**

A contract will be awarded for the length of the project. Arts Council England will pay on receipt of each deliverable.

You must indicate any subcontractors you are proposing to use in delivering the services.

**Evaluation criteria**

You are required to respond to **ALL** of the criteria below. To assist our evaluation of your tender submission, please ensure you clearly cross-refer your responses to the assigned numbers. Any relevant supporting tender documentation must also be clearly identifiable by a criteria number.

The table below gives the criteria that will be used to evaluate the quality of the tender proposals received.

|  |  |  |
| --- | --- | --- |
|  | **Criteria** | **Weighting** |
| 1 | Demonstrate an understanding of the Quality Metrics evaluation framework and existing evaluation and data collection tools already in use by the sector | 20% |
| 2 | Please set out a detailed and robust methodology for the evaluation that will meet the aims and objectives set out above. Please outline why your solution is appropriate by reference to your previous relevant experience. | 40% |
| 3 | Detail the relevant skills and experience of the key personnel that will work on this project and their capacity to deliver this contract to time. | 30% |
| 4 | Demonstrate your ability to deliver clear, accurate and easy to understand research reports by providing examples of two reports you have delivered in the past. | 10% |

  Each criterion will be scored using the methodology in the table below.

|  |  |  |
| --- | --- | --- |
| 0 | Very Poor | No response or partial response and poor evidence provided in support of it.  Does not give Arts Council England confidence in the ability of the Bidder to deliver the Contract and/or our requirements are not met in most respects. |
| 1 | Weak | Response is supported by a weak standard of evidence in some areas giving rise to concern about the ability of the Bidder to deliver the Contract and/or our requirements are not met in some respects. |
| 2 | Satisfactory | Response is satisfactory and supported by a satisfactory standard of evidence. Gives Arts Council England confidence in the ability of the bidder to deliver the contract, meets the requirements in most respects. |
| 3 | Good | Response is comprehensive and supported by good standard of evidence. Gives Arts Council England a high level confidence in the ability of the Bidder to deliver the contract and meets Arts Council England ’s requirements. |
| 4 | Very Good | Response is comprehensive and supported by a very good standard of evidence meeting Arts Council England requirements and may exceed them in some respects. Gives Arts Council England a very good level of confidence in the ability of the Bidder to deliver the contract. |
| 5 | Exceptional | Response is very comprehensive and supported by a high standard of evidence. Gives Arts Council England a very high level of confidence in the ability of the Bidder to deliver the contract.  May exceed Arts Council England’s requirements in several respects. |

1. **Price criteria (30 marks)**

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 firm total costs figure including VAT and expenses 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)

**The bidder with the highest score when the quality and price marks are added up will be the preferred bidder.**

# **Schedule of Charges**

VAT is chargeable on the services to be provided and this will be taken into account in the overall cost of this procurement contract.

Bidders shall complete the schedule of charges Table A below estimating the number of days and travel and subsistence costs associated with their bid. The total fixed price will be inclusive of VAT and inclusive of expenses and all costs to be incurred.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | | **Role Description and Day Rate** | | | **Total Days** | **Total Firm and Fixed Price shall not exceed (£)** |
| **TABLE A:** | | | **e.g. Project Manager/ Director [name individual]** | **e.g. Researcher**  **[name individual]** | **Other**  **[name individual]** |
|  | | | ***e.g. £500*** | **e.g. £300** | **e.g. £200** |  |  |
|  | |  | ***Quantity*** | | |  |  |
| Pre contract inception meeting with Arts Council England | |  | *e.g. 0.5* | *1* | *1.5* | *3* | *850* |
| **Please insert additional rows to outline costs related to the deliverables in the brief (ie, liaison with organisations, case studies, surveys etc)** | |  |  |  |  |  |  |
| Progress Reports | |  |  |  |  |  |  |
| Presentation of Mid-way findings | |  |  |  |  |  |  |
| Final Evaluation Report | |  |  |  |  |  |  |
| Travel and subsistence | |  |  |  |  |  |  |
| Other (non-staff) costs –  *Please specify* | |  |  |  |  |  |  |
| *[Add as necessary]* | |  |  |  |  |  |  |
| **Sub-total** | | | | | | | £ |
| **VAT** | | | | | | |  |
| **Total Fixed Price including VAT and expenses shall not exceed (this figure will be used for the purposes of allocating your score for the price criterion)** Please note: bids that exceed £30,000 for all the services (including VAT and expenses) will be excluded from this tender process as unaffordable. | | | | | | | £ |

Notes: Arts Council England 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.

**Section 2: Instructions to tenderers**

Please submit your tender offer in accordance with all of the instructions, requirements and specifications set out in the enclosed documentation.

You must treat these documents and any further information provided by Arts Council England as confidential at all times and only disclose them if necessary to prepare a compliant response to the tender.

Nothing in the enclosed documentation or appendixes, or any other communication made between Arts Council England and any other party, can be considered a contract or agreement at this stage.

**Compliance**

Arts Council England reserves the right to disqualify or reduce the evaluation score of any tenderers who do not fully comply with the requirements in the tender documentation, in particular the closing time and date.

If you propose alternative goods or services for consideration, you must clearly mark these as non-compliant. Arts Council England reserves the right to reject any proposals with non-compliant alternatives. Tenders that are received are not automatically accepted.

The Arts Council’s standard terms and conditions for services will form part of the contract to be awarded. These can be downloaded and reviewed from our website: <http://www.artscouncil.org.uk/media/uploads/pdf/>

**There are terms and Contract\_for\_Services\_over\_10K and those for Contracts for Services below £10k. You should review the terms applicable to this tender.**

The Arts Council may also require further terms to be included in the contract that are specific to the successful supplier‘s application.. **The Preferred Supplier will not be permitted to enter into any negotiations on the terms of the Contract. Any attempt to negotiate amendments will breach the terms of this ITT and will result in the Preferred Supplier being excluded from the tender process. In such circumstances Arts Council England reserves the right to invite the next highest scoring Bidder to enter into the Contract.**

Please note that Arts Council England are required to publish online the final awarded contract and any associated documentation. If you have any concerns about the future publication of sensitive information you should raise these within your tender proposal, highlighting which areas within your proposal you consider may be subject to exemption, and subsequent redaction, in line with the provisions of the Freedom of Information Act 2000 (FOIA). More information about FOIA can be found at [www.ico.gov.uk](http://www.ico.gov.uk).

**Validity of offer**

Please note that by submitting a tender response for consideration you are confirming that, as an officer for the company/organisation that you represent, you have read and understood the tender documents and that your offer to Arts Council England is open for acceptance for 60 days from the tender closing date.

**Tendering**

Arts Council England reserves the right, in its absolute discretion, to cancel or suspend this tender process at any time and for any reason. If we need to do this we will notify you in writing as soon as reasonably practicably.

Arts Council England is not responsible, and will not pay for any expenses or losses you incur during, but not limited to, the tender preparation, site visits, or clarification meetings.

**Information and questions**

If you need us to clarify the documentation or if you have further questions regarding the tender process, write to the lead officer quoting the tender reference number. We will try to respond to reasonable requests for further information within the timescale of the tender.

Arts Council England reserves the right to advise all other tenderers of material questions and the answers supplied without disclosing the source of the enquiry. These will be issued via the Contracts Finder website ((https://online.contractsfinder.businesslink.gov.uk/) if the contract value is estimated to be above £10k including VAT. It is the bidder’s responsibility to check the website regularly for any clarifications.

**Return of Tender**

## Return of Tender

You must complete and submit your tender response/proposal electronically into the secure document exchange by the tender response deadline of **12 noon on 2 December 2015**

To submit your response/proposal please follow the instructions below:

1. Complete your tender response/proposal.

2. Go to www.delta-esourcing.com and login using your username and password.

3. Click on the ‘Responses Manager’ tab and then click on the ‘–insert correct title here’ link.

4. Click on the ‘Deposit Tenders Responses’ tab.

5. Click on ‘Browse’ and select the file that contains your tender response/proposal. Then click on ‘Submit’ to upload your tender response/proposal.

If you are experiencing any problems submitting your document online, please contact the Delta helpdesk at helpdesk@delta-esourcing.com or call 0845 270 7050 for further assistance.

Please allow at least two hours to upload your completed documents. We will only accept responses submitted via the secure electronic document exchange. We will not accept any responses submitted by any other method including email. Any tender delivered after the closing date and time for any reason may be discounted.

The Arts Council is not responsible if all or part of your tender is not received.

**Post-tender clarifications**

Arts Council England reserves the right to ask you to attend a post-tender clarification meeting.

Arts Council England reserves the right to conduct post-tender clarifications with one or more tenderers depending on the closeness of a bidder’s score to the highest scoring bidder.