**Framework Tender for Digital Heritage Consultants**

**Tender Submission**

**Please do not return this in any other format than Word (e.g. PDF, Notes etc.). We will only accept this format.**

**Please save and name your return in Word under you company name for identification purposes when you return the tender.**

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| **"Bidders details"** - Please enter all contact and bank details. | | | | | | | | | | | | | | | | |
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| **"Candidate 1 General and Cost Questions"** - You should provide general information and your daily rate here. We will disregard any text beyond this, so please use the space to demonstrate your experience most relevant to our needs. Do not submit any organisational brochure or leaflet as this will also be disregarded. Your organisation may submit up to five named individuals, so **copy and paste the tables for additional candidates**. | | | | | | | | | | | | | | | | |
| **"Candidate 1 Detailed Questionnaire"** - This is where you can give us detailed information about your experience with word limits for each section. We will disregard any text beyond this, so please use the space to demonstrate your experience most relevant to our needs. Do not submit any organisational brochure or leaflet as this will also be disregarded. Your organisation may submit up to five named individuals, **so copy and paste for additional candidates**. | | | | | | | | | | | | | | | | |
| **"Declaration of information"** - This is your declaration that the information you have provided is accurate and true. Please sign this using an electronic signature. | | | | | | | | | | | | | | | | |
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| **"Form of tender"** - This is your declaration for the Contract and your acceptance of the framework agreement. You should type or copy and paste the text from this worksheet onto your own letter headed paper. We will NOT accept any Bidder Qualifications. Please sign this with an electronic signature and return it with your tender submission | | | | | | | | | | | | | | | | |
| **Company details:** | | | | | | | | | | | | | | | | |
| 1. Registered company name: | | | | | | | |  | | | | | | | |
| 2. Main operational address for the service | | | | Address 1: | | | |  | | | | | | | |
| Address 2: | | | |  | | | | | | | |
| Address 3: | | | |  | | | | | | | |
| Town: | | | |  | | | | | | | |
| County: | | | |  | | | | | | | |
| Post code: | | | |  | | | | | | | |
| Landline / Mobile: | | | | | | | |  | | | | | | | |
| Fax: | | | | | | | |  | | | | | | | |
| Email: | | | | | | | |  | | | | | | | |
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| **Contacts:** | | | | | | | | | | | | | | | | | | | | | |  |
| 3. Responsible person for the Contract: | | | | | | | | | | | | | | | |
| Name: | | | | | | | |  | | | | | | | |
| Landline / Mobile: | | | | | | | |  | | | | | | | |
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| 4a. First candidate carrying out the Service (If different from 3. above) | | | | | | | | | | | | | | | |
| Name: | | | | | | | |  | | | | | | | |
| Address 1: | | | | | | | |  | | | | | | | |
| Address 2: | | | | | | | |  | | | | | | | |
| Address 3: | | | | | | | |  | | | | | | | |
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| 4b. Second candidate carrying out the Service | | | | | | | | | | | | | | | |
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| Address 2: | | | | | | | |  | | | | | | | |
| Address 3: | | | | | | | |  | | | | | | | |
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| 4c. Third candidate carrying out the Service | | | | | | | | | | | | | | | |
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| 4d. Fourth candidate carrying out the Service | | | | | | | | | | | | | | | |
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| Address 3: | | | | | | | |  | | | | | | | |
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| 4e. Fifth candidate carrying out the Service | | | | | | | | | | | | | | | |
| Name: | | | | | | | |  | | | | | | | |
| Address 1: | | | | | | | |  | | | | | | | |
| Address 2: | | | | | | | |  | | | | | | | |
| Address 3: | | | | | | | |  | | | | | | | |
| Town: | | | | | | | |  | | | | | | | |
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| **Financial information:** | | | | | | | | | | | | | | | |
| 5. VAT registration number (if applicable) | | | | | | | |  | | | | | | | |
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| 6. Payment Details | | Account name: | | | | | |  | | | | | | | |
| Bank name: | | | | | |  | | | | | | | |
| Address: | | | | | |  | | | | | | | |
| Sort code: | | | | | |  | | | | | | | |
| Account number: | | | | | |  | | | | | | | |
| **GENERAL AND COST QUESTIONS** | | | | | | | | | | | | | | | | | | | |
| **Copy and paste the tables as necessary for additional candidates.** | | | | | | | | | | | | | | | | | | | |
| **In this section, we are looking for an appropriate level of experience.**  **1. Please indicate which of the following categories of clients you have been employed by to deliver a digital project (your examples can include heritage and non-heritage projects). Provide the names of up to three clients per category, and the value of the project.** | | | | | | | | | | | | | | | | | | | |
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| **Client Type** | | | | | | | | | **Client(s)** | | | | | | | **Value** |
| Local government: | | | | | | | | |  | | | | | | |  |
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| Other Public (e.g. universities, nationally funded museums etc.) or public sector bodies (e.g. NHS, national government, former Sector Skills Council, CADW, Historic Environment Scotland, Historic England, DoE NI, etc.): | | | | | | | | |  | | | | | | |  |
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| Voluntary and charitable sector: | | | | | | | | |  | | | | | | |  |
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| Private sector: | | | | | | | | |  | | | | | | |  |
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| **2. Please provide three referees who will testify to your achievement of high levels of clientsatisfaction.** | | | | | | | | | | | | | | | | | | | |
|  | | **1st referee** | | | | | | | **2nd referee** | | | | | **3rd referee** | | | | | |
| **Contact name:** | |  | | | | | | | |  | | | |  | | | | | | |
| **Position:** | |  | | | | | | | |  | | | |  | | | | | | |
| **Org.:** | |  | | | | | | | |  | | | |  | | | | | | |
| **Project title:** | |  | | | | | | | |  | | | |  | | | | | | |
| **Project cost:** | |  | | | | | | | |  | | | |  | | | | | | |
| **Email:** | |  | | | | | | | |  | | | |  | | | | | | |
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| **3. What measures do you have in place to monitor your own performance? (100 words)** | | | | | | | | | | | | | | | | | | | |
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| **4. What is your likely capacity (for example days per quarter) and normal lead in time? (100 words)** | | | | | | | | | | | | | | | | | | | |
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| **6. Cost** | | | | | | | | | | | | | | | |  |
| Quote the Charges (per day) in pounds sterling and: | | | | | | | | | | | | | | | | | | | |
| * inclusive of VAT, where levied. Please provide your VAT status. State “Not levied” if that is the case. | | | | | | | | | | | | | | | | | | | |
| * inclusive of all photocopying, mailing, printing and other administrative costs; | | | | | | | | | | | | | | | | | | | |
| * exclusive of travel and subsistence. | | | | | | | | | | | | | | | | | | | |
| The charge you quote will apply to the first 40 working days commissioned. The charge will be reduced by 20% for the next 41-80 days commissioned. Work commissioned for 81 and more days will be charged at a further 20% reduction.  The volume discount reset each 12 month period, therefore each year your day rates will be discounted after 40 days and again after 80 days of work. | | | | | | | | | | | | | | | | | | | |
| HLF will pay reasonable travel expenses only as given below. All other travel must be booked through HLFs travel agency contract. Further details will be provided if your application if successful. | | | | | | | | | | | | | | | | | | | |
| MILEAGE ALLOWANCE RATES Cars (own cars in use): Standard rate up to 10,000 miles pa 45p per mile Standard rate over 10,000 miles pa4 24p per mile  Passenger rate (no mileage limits)¹ 5p per mile  Motorbikes: Standard rate (no mileage cap) 24p per mile  Bicycles: Standard rate (no mileage limits) 20p per mile | | | | | | | | | | | | | | | | | | | |
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| Grade | | VAT status | Initial daily rate (excl. VAT) | | | | | VAT | | Initial total for first 40 days | Total for 41-80 days incl. @ 20% discount | Total for 81 days and above @ further 20% discount | |  | | |  | |  | |
|  | |  | £0.00 | | | | | £0.00 | | £0.00 | £0.00 | £0.00 | |  | | |  | |  | |
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| **6) We must communicate with grantees both verbally and in writing in the Welsh language if the grantee so requires. Please indicate that you are fluent speaker and writer in Welsh?** | | | | | | | | | | | | | | | |  |

# DETAILED QUESTIONNAIRE

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| HLF is looking for consultants with substantial relevant experience and expertise in at least one of the five areas of digital practice set out below. We are seeking to recruit digital experts to work across our funding portfolio, which includes wide range of heritage projects. You should aim to illustrate your experience and expertise across different types of digital work, including heritage projects where relevant.  PLEASE COMPLETE THE BELOW SECTIONS  **Copy and paste the tables as necessary for additional candidates.**  **Detailed Criteria for:**  **Name:**  Please complete the clear boxes below. Throughout, word limits are maxima, and we will disregard any content that exceed them.   1. **Summary of experience and expertise**   Please give a summary of your experience and expertise as relevant to this tender, including relevant qualifications and membership of professional bodies.  Summary (500 words)   |  | | --- | |  |  1. **Areas of digital practice**   For each area below for which you wish to be considered, please tick the appropriate boxes and give the required number of case studies to demonstrate recent relevant experience and expertise.   * Focus on your own role and activity, the issues and challenges you faced and overcame, and the outputs/outcomes specifically of your work. * Give case studies of work within the last three years. * Choose a different focus for each case study. | | | | | | | | |  | | |
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| **Digital production**  This includes the following areas: aligning digital strategy with project objectives; scoping and managing digital projects (e.g. user experience design, functional requirements, information architecture, support services and/or hardware requirements); production of digital interactive or immersive content in various formats (e.g. websites, games, apps, virtual reality experiences, augmented reality experiences, geolocation and/or site specific installations); production of digital archives, databases or other large-scale systems; expertise in digital accessibility and usability for general audiences and/or those with specific accessibility requirements; analytics and evaluation of digital products; management of design, updating, hosting and maintenance of digital systems and content to ensure information security, system resilience, longevity, value for money and interoperability with other systems.  Your specialisms (please select):  🞎 digital strategy  🞎 scoping and managing digital projects  🞎 information architecture  🞎 digital support services/hardware  🞎 production of content/experience in websites  🞎 production of content/experience in games  🞎 production of content/experience in apps  🞎 production of content/experience in virtual reality/augmented reality  🞎 production of content/experience for geolocation  🞎 production of content/experience in site-specific installations;  🞎 production of digital archives  🞎 production of databases  🞎 production of other large-scale systems  🞎 accessibility/usability  🞎 analytics  🞎 management of digital systems  Please describe **three case studies** that demonstrate your range of skills and experience: | | | | | | | | |  | | |
| Case study 1 (500 words) | | | | | | | | |  | | |
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| Case study 2 (500 words) | | | | | | | | |  | | |
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Case study 3 (500 words)

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| **Digital audience development**  This includes the following areas:identifying and targeting digital audience segments based on interests, online behaviours and/or content consumption patterns;designing audience-facing activities that extend or enhance a ‘physical world’ experience, attract new and more diverse audiences and/or deliver a learning or educational focus; managing digital marketing activities to reach, engage and retain relevant audience groups; managing activities that encourage people to participate in crowd-sourced digital initiatives and data collection (e.g. community heritage or citizen science projects) or contribute and share their own user–generated digital content; evaluating audience outcomes in terms of reach and engagement via web analytics and other quantitative or qualitative methods; using such audience evaluation to inform and improve future digital activities.  Please describe **three case studies** that demonstrate your range of skills and experience: | | | | | | | | |  | | |
| Case study 1 (500 words) | | | | | | | | |  | | |
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| Case study 2 (500 words) | | | | | | | | |  | | |
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| Case study 3 (500 words)   |  | | --- | |  |   **Content digitisation**  This includes the following areas: digitising analogue content at scale (e.g. ranging from 1,000 items plus for local community projects to 100,000 items plus for national projects); working with a range of scalable digitisation approaches (e.g. 2D or 3D scanning, photography, video, audio or other recording methods); expertise in international and UK digital content formats and standards relevant to galleries, libraries, archives, museums, archaeology and/or natural heritage projects; large-scale conversion of existing digital asset libraries or ‘born digital’ content into new formats; work to ensure the cross-compatibility of digitised assets with multiple systems; management of digital asset storage/hosting to ensure data security, appropriate accessibility and resilience.  Your specialisms (please select):  🞎 digitisation of images  🞎 digitisation of audio  🞎 digitisation of moving images  🞎 3D digital capture  🞎 management of digitised assets  Please describe **three case studies** that demonstrate your range of skills and experience: | | | | | | | | |  | | |
| Case study 1 (500 words) | | | | | | | | |  | | |
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| Case study 2 (500 words) | | | | | | | | |  | | |
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| Case study 3 (500 words)   |  | | --- | |  |   **Digital cataloguing**  This includes the following areas: cataloguing and archive management of digitised analogue content and/or ‘born-digital’ content at scale (e.g. ranging from 1,000 items plus for local community projects to 100,000 items plus for national projects); expertise in UK and international meta-data standards for digital content relevant to galleries, libraries, archives, museums, archaeology and/or natural heritage projects; expertise in user experience design and information architecture to ensure content discoverability; training and management of participants in crowdsourced digital archiving and data collection including community heritage and/or citizen science projects and the collection and cataloguing of user-generated content; management, hosting, maintenance and updating of digital catalogues and archives to ensure system availability, data integrity, security and resilience.  Your specialisms (please select):  🞎 cataloguing/metadata  🞎 information architecture  🞎 crowdsourced/user-generated content  🞎 digital community collections  🞎 citizen science  🞎 analytics  🞎 management of digital collections  Please describe **three case studies** that demonstrate your range of skills and experience: | | | | | | | | |  | | |
| Case study 1 (500 words) | | | | | | | | |  | | |
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| Case study 3 (500 words)   |  | | --- | |  |   **Digital rights management**  This includes the following areas: managing or providing advice in relation to the ownership and/or licencing of intellectual property rights for digital assets and software within the UK legal framework and relevant to galleries, libraries, archives, museums, archaeology and/or natural heritage projects. We do not require formal legal qualifications but do require evidence of experience advising on complex rights issues in relation to such projects. | | | | | | | | |  | | |
| Case study 1 (500 words) | | | | | | | | |  | | |
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| **MENTORING SKILLS** | | | | | | | | | |
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| **We will require all consultants to provide mentoring support to our grantees. You must therefore demonstrate skills, knowledge, expertise and experience of mentoring. NB you do not need to refer to heritage-based digital project/s in your examples.  Please give 2 examples to evidence how you have used coaching, listening and facilitating to support other people deliver their projects, whilst ensuring that they did not become dependent upon your ongoing support.**  **In your answer, we advise you to focus on the areas below. You do not have to refer to them all.**  **1) defining the scope purpose and objectives of a digital project**  **2) problem solving and crisis management including handling conflict and closing down digital projects**  **3) time management and meeting deadlines**  **4) managing risk**  **5) developing and managing a budget**  **6) organisation and stakeholder engagement at all levels**  **(600 words per box)** | | | | | | | | | |
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| **OPERATING IN A PROJECT MANAGEMENT ENVIRONMENT** | | | | | | | | | |
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| **1) Please briefly summarise your experience of undertaking the following roles:** | | | | | | | | | |
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| **1.1) Developing fit for purpose digital project governance and delivery structures (300 words)** | | | | | | | | | |
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| **1.2) Providing impartial and succinct assessment of digital project progress with recommendations for action (300 words)** | | | | | | | | | |
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**EVALUATION CRITERIA**

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| **Evaluation criteria** |
| 1. How capable is the candidate of managing strategy, scoping, production, delivery and maintenance in relation to digital content, experiences and/or systems? |
| 2. How capable is the candidate of managing audience development activities to target, reach and engage audiences with digital content? |
| 3. How capable is the candidate of managing the digitisation of analogue content at scale and/or the conversion of existing digital assets to new formats? |
| 4. How capable is the candidate of managing the cataloguing and archiving of digitised analogue content and/or ‘born digital’ content at scale? |
| 5. How capable is the candidate of managing or providing advice in relation to intellectual property rights relevant to heritage projects? |
| 6. How capable is the candidate of mentoring projects? |
| 7. How capable is the candidate of project managing projects? |

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| **DECLARATION** | |  |  |  |  |  | |  |  |
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| Before returning your submission, please read and sign below: | | | | | | |
|  | | | | | | |
| I/We certify that the information supplied is accurate to the best of my/our knowledge and that I/we accept the conditions and undertakings requested in the Questionnaire. I/we understand that false information could result in my/our application being rejected. | | | | | | |
|  | | | | | | |
| \*Signed | |  | | | | |
| Print Name | |  | | | | |
| Position | |  | | | | |
| Tel. No | |  | | | | |
| For and on behalf of | |  | | | | |
| Date | |  | | | | |

**TRANSPARENCY ARRANGEMENTS**

This must be completed and attached to your submission.

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| Note: In compliance with the Government’s transparency agenda, all Heritage Lottery Fund contracts over £10,000 (net of recoverable VAT) issued on or after 1 January 2011 will be published on the Government’s Contracts Finder website. We are required to publish contracts in full, and as a minimum must publish the specification, terms and conditions and associated schedules (which may include the winning bidder’s bid).  In limited circumstances redactions can be made prior to publication to protect certain types of information. Redactions are permitted in line with the exemptions set out by the Freedom of Information Act 2000. Examples of information which may be exempt under the FOIA include: personal data; information amounting to a trade secret; and information which if disclosed would or would be likely to prejudice the commercial interests of any person. | |
| If the Bidder believes redactions ought to be made, these should be identified by the Bidder in the following table on their own letter headed paper. Bidders must provide explicit justification and reasoning for each redaction requested. The Heritage Lottery Fund is responsible for determining in its absolute discretion whether any information is exempt from publication.  **CONTRACT FOR TENDER TITLE:** National Heritage Memorial Fund Framework for Digital Consultants; Tender No. [NUMBER] | |
| **Contract clause or section of tender to be redacted** | **Justifications for redaction** |
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