# NHMF CONTRACT NUMBER 306

**Organisation National Heritage Memorial Fund**

**Department** Marketing and Communications, BII

**Title of procurement Design of annual reports: The National Lottery Heritage Fund and National Heritage Memorial Fund**

**Brief description of supply**: We are looking for a suitably qualified service provider to design our National Lottery Heritage Fund and National Heritage Memorial Fund annual reports in 2021/2022, and for the following two years – 2022/23 and 2023/24 (following the same core design as that of 2021/22 but with some updates and adaptations, as well as new content).

**Estimated value of tender** £78,000 (exclusive of VAT)

**Estimated duration** Three years

**Name of Heritage Fund Contact** Susannah Evans, Publications and Design Manager

**Timetable** Response deadline: 29.3.22 AT NOON

Question & Answers Period End: 21.3.22

Presentations if needed: 30.3.22

Confirmation of contract: 31.3.22

Commencement of project: 1 April 2022

Completion of project: 30 September 2024

## Introduction

We are looking for a suitably qualified service provider to design our National Lottery Heritage Fund and National Heritage Memorial Fund annual reports in 2021/2022, and for the following two years – 2022/23 and 2023/24 (following the same core design as that of 2021/22 but with some updates and adaptations, as well as new content).

## Background

**National Heritage Memorial Fund (NHMF)**Set up in 1980, the National Heritage Memorial Fund (NHMF) is a government ‘fund of last resort’ that provides grants to help acquire the UK’s most precious heritage at risk of loss, as a permanent memorial to those who have given their lives in service to the country. For further information about NHMF and the projects we have funded, please visit [www.nhmf.org.uk](http://www.nhmf.org.uk).

**The National Lottery Heritage Fund (Heritage Fund)**

The National Lottery Heritage Fund is the largest funder of heritage in the UK. We create positive and lasting change for people and communities everywhere, now and in the future. We do this through inspiring, leading and resourcing the UK’s heritage and by championing its many benefits. For further information about the Heritage Fund and the projects we have funded, please visit [www.heritagefund.org.uk](http://www.heritagefund.org.uk)

**Annual reports**

We provide annual reports for each of these organisations, in English and Welsh languages. These annual reports are laid before the House of Commons, Scottish Parliament, Welsh Parliament and Northern Ireland Assembly. They are also published on gov.uk, our own websites and shared with stakeholders.

## The Commission

**Overview of work for NHMF annual report**

1. Provide three design concepts for initial design of NHMF annual report – with consideration given to allow for typeset Welsh text and how the design can be adapted and evolved in years 2 and 3. Visit the NHMF website for links to recent [NHMF annual reports](http://www.nhmf.org.uk/about-nhmf/annualreports) (with the exception of 2019/2020, which did not include preceding case studies).
2. Develop chosen design concept and typeset with copy
3. Use English copy supplied in Word documents, design and typeset the annual report.
4. Incorporate several rounds of author’s amends often with a fast turnaround. For information, edits to the content of the reports in later rounds is out of our control and all amends are required to be made. There could be as many as 7 or 8 sets of author’s amends – the later rounds of amendments are significantly lighter than earlier ones. Flexibility to turnaround text edits (including numbers within tables) within a short period of time is key to this project. We can provide a publication schedule with rough dates of when amends will come but these dates are flexible.
5. Images will be supplied for the front end of the report but additional retouching/cut-outs may be necessary
6. Proof read for design-related issues, including page references.
7. Provide a print-ready PDF and liaise with printers, including checking printer’s proofs.
8. Provide a web-ready PDF – fully accessible to WCAG 2.1 standards. This is also a key stage to the process. Please note that if you are unable to provide this service in-house, you will need to outsource to an accessibility provider.
9. Use Welsh text, provided in Word document, to typeset Welsh version – overlaying onto English copy, using same layout and table options. Flag page references and any other design-related copy for NHMF in-house translators to check.
10. Provide a print-ready PDF of Welsh copy and liaise with printers, including checking printer’s proofs.
11. Provide a web-ready PDF of Welsh copy – fully accessible to WCAG 2.1 standards.
12. Evolve and develop the year 1 design into years 2 and 3 and repeat items 3-11 in years 2 and 3.

**Format and style of NHMF annual report**

Previous reports have included a front end section of approximately 13 case studies (this varies from year to year). The rest of the annual report is made up of approximately 50 pages (excluding covers and title pages).

The design needs to consider the limited colour palette of the NHMF brand and although there are no set brand guidelines for NHMF, consideration can be given to the look and feel of the website: <https://www.nhmf.org.uk/> and the heritage-focused nature of the fund and the publication.

Photos: the document will need to include images of case studies, these will be provided by NHMF.

**Overview of Heritage Fund annual report**

1. Provide three design concepts for initial design of Heritage Fund annual report – with consideration given to allow for typeset Welsh text and how the design can be adapted and evolved in years 2 and 3. Visit the Heritage Fund website for links to recent [Heritage Fund annual reports.](https://www.heritagefund.org.uk/about/transparency/annual-reports)
2. Develop chosen design concept and typeset with copy
3. Use English copy supplied in Word documents, design and typeset the annual report.
4. Incorporate several rounds of author’s amends often with a fast turnaround. For information, edits to the content of the reports in later rounds is out of our control and all amends are required to be made. There could be as many as 7 or 8 sets of author’s amends – the later rounds of amendments are significantly lighter than earlier ones. Flexibility to turnaround text edits (including numbers within tables) within a short period of time is key to this project. We can provide a publication schedule with rough dates of when amends will come but these dates are flexible.
5. Images will be supplied for the front end of the report but additional retouching/cut-outs may be necessary
6. Proof read for design-related issues, including page references.
7. Provide a print-ready PDF and liaise with printers, including checking printer’s proofs.
8. Provide a web-ready PDF – fully accessible to WCAG 2.1 standards.
9. Use Welsh text, provided in Word document, to typeset Welsh version – overlaying onto English copy, using same layout and table options. Flag page references and any other design-related copy for NHMF in-house translators to check.
10. Provide a web-ready PDF – fully accessible to WCAG 2.1 standards.
11. Evolve and develop the year 1 design into years 2 and 3 and repeat items 3-10 in years 2 and 3.

**Format and style of Heritage Fund annual report**

The Heritage Fund report is largely a plain annual report and accounts document, though consideration could be given for pull out quotes, and data graphics. There are no pictorial case studies included.

The design needs to consider our latest brand guidelines.

## Considerations for both NHMF and Heritage Fund annual reports

## Graphic elements

The documents will feature a range of tables and charts – as per previous years.

## Accessibility

All four final PDF reports (Welsh and English NHMF and Heritage Fund) need to be provided in a fully accessible format – adhering to WCAG 2.1 standards.

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

All documents in all formats and languages (e.g. word, Indesign, PDF) that are published on our website or intranet need to adhere to WCAG 2.1 standards: [Web Content Accessibility Guidelines (WCAG) 2.1 (w3.org)](https://www.w3.org/TR/WCAG21/)

See also: [Create and verify PDF accessibility, Acrobat Pro (adobe.com)](https://helpx.adobe.com/uk/acrobat/using/create-verify-pdf-accessibility.html)

If you are not able to produce an accessible document that adheres to these guidelines you will need to outsource this to a web accessibility contractor – you will need to allow for this in your budget and timeline.

## What we are looking for in our partners:

A designer/designers that have experience in producing annual reports or other corporate reports.

Experience with accessibility and ability to produce PDF reports that conform to WCAG 2.1 standards when published on a website.

Ability to design information in engaging, easy-to-read way.

Beneficial to have experience of government/civil service reports or a willingness to learn about the process of laying reports before parliament.

## Outputs

The following outputs will be required:

* + Three design concepts for both reports
	+ Development of chosen design concept
	+ Design and typesetting of reports
	+ Incorporation of several rounds of author’s amends.
	+ Retouching/cut-outs of images
	+ Proof reading for design-related issues
	+ Creation of print-ready PDF, checking printer’s proofs
	+ Creation of web-ready PDF – fully accessible to WCAG 2.1 standards
	+ Typesetting of Welsh language into design
	+ Creation of web-ready Welsh PDF
	+ Creation of print-ready Welsh PDF

## Contract management

* + We expect the project to begin on the 1 April and be completed by 30 September 2024

Year 1: Listed in ‘3. The Commission’ stages 1-10 (project start: 1 April 2022, project end: 30 September 2022)

Year 2: Listed in ‘3. The Commission’ stages 3-10 (project start: 1 April 2023, project end: 30 September 2023)

Year 3: Listed in ‘3. The Commission’ stages 3-10 (project start: 1 April 2023, project end: 30 September 2023)

* + The anticipated budget is not to exceed £78,000 (over three years). The contract will be let by the National Heritage Memorial Fund against our standard service contract.
	+ The payment schedule will be directly linked to final report deliveries being satisfactorily completed and invoiced correctly.
	+ **Year 1 budget**

60%: After completion of English language reports

40% After completion of Welsh language reports

* + **Year 2 budget**

60%: After completion of English language reports

40% After completion of Welsh language reports

* + **Year 3 budget**

60%: After completion of English language reports

40% After completion of Welsh language reports

* + The project will be managed on a day to day basis for the Fund by Susannah Evans, Publications Manager

## Award Criteria

A proposal for undertaking the work should include:

* A detailed methodology/approach for undertaking the project, including details of staff allocated to the project;
	+ - 25%
* Two-three examples of previous annual reports or corporate reports to illustrate how you present heavy, corporate information (both long prose and data) in an engaging and easy-to-read way.
	+ - 25%
* Explanation of how you approach author’s amends in design stage:
	+ - 20%
* Detail of specific experience dealing with accessible documents (fully accessible for screen readers):
	+ - 20%
* A timescale for carrying out the project:
	+ - 10%
	+ Your Quality element will be scored out of 100%.

**60% of the total marks will be awarded to Quality**

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

Tender responses submitted will be assessed by the Fund against the following Quality Questions :-

1. To what extent does the tender response demonstrate an understanding of the requirement?
2. To what extent is the method appropriate to the project?
3. What is the extent of the consultants’ experience of similar projects?
4. How well has the tenderer structured their team in order to successfully manage the contract and deliver the required work to the budget and timetable required by the Fund?

## 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 Fund 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 Fund confidence in the ability of the Bidder to deliver the contract. Meets the Fund’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the Fund a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the Fund’s requirements in some respects.  |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the Fund a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the Fund’s requirements in most respects. |

**40% of total marks will be awarded for Price.**

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

## Price Criterion at 40%

* 40 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 40% (full marks) for price and the second placed bidder gets 36.8% and so on. (8/100 x 40 = 3.2 marks; 40-3.2 = 36.8 marks)
* The scores for quality and price will be added together to obtain the overall score for each 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.

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 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)**

| **Cost** | **Post 1 @cost per day****(No of days)***e.g. Project Manager/ Director**@ £2* | **Post 2 @cost per day****(No of days)***e.g. Senior Consultant/manager/researcher**@£1.5* | **Post 3 @cost per day****(No of days)***Junior* *Consultant/equivalent* *e.g. £1* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Fund | *Example 0.5* | *1* | *1.5* | *3* | *£4* |
| *[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: The Fund reserves the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low quality response. The Fund also 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

* + The Fund reserves the right to reject abnormally low scoring tenders. The Fund reserves the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.
	+ Procurement Timeline: -

## Response deadline: 29.3.22 AT NOON

## Question & Answers Period End: 21.3.22

## Presentations if needed: 30.3.22

## Confirmation of contract: 31.3.22

## Commencement of project: 1 April 2022

## Completion of project: 30 September 2024

* We reserve the right to carry out clarifications if necessary; these may be carried out via email or by inviting bidders to attend a clarification meeting.  In order to ensure that both the Fund’s and Bidder’s resources are used appropriately, we will only invite up to three (the ultimate number will depend on the closeness of the scores) highest scoring bidders to attend a clarification meeting.  Scores will be moderated based on any clarifications provided during this meeting.  You are responsible for all your expenses when attending such meetings.
	+ Your tender proposals must be sent electronically via e-mail before the tender return deadline of 29.3.22 at noon to the following contact:

Susannah Evans

National Heritage Memorial Fund

Mezzanine North

International House

1 St Katharine’s Way

London

E1W 1UN

Email: Susannah.evans@heritagefund.org.uk

Telephone: 020 8132 7260

 [www.heritagefund.org.uk](http://www.heritagefund.org.uk)

## Appendix: Accessibility and formatting guidance

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

Reports and other documents created for the Fund (**including the tender submissions**) need to be clear, straightforward to use and ready to circulate internally, externally and online, as well as suitable for use by screen reading software. Best practice in accessibility is summarised below:

### Readability

In the final report, and all other documents that may be published online including the tender application 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
* 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. Heading styles should follow on from each other i.e. Heading 1 then Heading 2.

#### Spacing

Screen readers audibly represent spaces, tabs and paragraph breaks within copy, so it is best practice to avoid the repetitive use of manually inserted spaces. Instead, indenting and formatting should be used to create whitespace (e.g., use a page break to start a new page, as opposed to multiple paragraph breaks).

#### Alternative text

Alt text is additional information for images and tables. This extra information is essential for both document accessibility (screen reading software reads the Alt text aloud) and for the web. Alt text should be concise and descriptive, and should not begin with ‘Image of’ or ‘Picture of’.

#### Images

These should be formatted in-line with text, to support screen readers. Crediting pictures may be necessary, usually in response to a direct request from a third party.

#### Tables

These should be for used for presenting data and not for layout or design. They should be simple and include a descriptive title. The header row should be identified and there shouldn’t be more than one title row in a table. There should be no merged or blank cells.

#### Additional documents

Any additional information, separate to the report, for example proformas and transcripts which may be used as standalone documents must be fully referenced to the piece of work being submitting and therefore dated, formatted and numbered appropriately.

#### Further resources

Please refer to the WCAG 2.0 article on [PDF techniques](https://www.w3.org/TR/2014/NOTE-WCAG20-TECHS-20140408/pdf.html) for further information.

### Submitting your report to THE FUND

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

Please submit your document as a Word file.

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