# Digital Skills for Heritage Tranche 4 Leading the Sector: Promoting and Building Senior Digital Leadership across the Heritage Sector

**Organisation:**  TheNational Lottery Heritage Fund

**Department:**  Business Innovation and Insight

**Title of procurement:** Promoting and Building Digital Leadership across the Heritage Sector

**Brief description of supply:** A series of events designed to showcase and promote senior digital leadership across the heritage sector and provide opportunities for heritage leaders to effectively network with one another.

**Estimated value of tender:** Up to £50,000 (including VAT)

**Estimated duration:** up to 12 months

**Name of the Fund Contact:** Ruth Dench

**Timetable**

Clarification question deadline: noon on 03/09/2021

Clarification responses: 06/09/2021

Application deadline: 11.00 am on the 20/09/2021

Meeting with shortlisted applicants: week commencing 04/10/2021

Confirmation of contract: week commencing: 04/10/2021

Contract signing: 18/10/2021

Project end date: 30/09/2022

## **Overview**

* 1. The National Lottery Heritage Fund, formerly the Heritage Lottery Fund (HLF), was set up 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). In January 2019 we launched our current [Strategic Framework: ‘Inspiring, leading and resourcing the UK’s heritage’](https://www.heritagefund.org.uk/publications/strategic-funding-framework-2019-2024). See [The Fund's website](https://www.heritagefund.org.uk/) for more details.
	2. The Fund 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 which underpin our grant-making.
	3. Digital Skills for Heritage is an ambitious £3.5M initiative which runs from February 2020 to March 2023, designed to drive up digital capabilities across the heritage sector. It promotes digital skills and leadership and directly supports digital skills development, providing a range of support to suit the needs of a diverse sector.
	4. Our Leading the Sector strand fosters and promotes senior level digital leadership. In 2020 we commissioned [Culture24 to deliver our first Leading the Sector project](https://www.heritagefund.org.uk/blogs/developing-digital-leadership-heritage), a professional development course which supported 16 senior leaders. This second commission follows that work but takes a new approach.
	5. The Fund wishes to commission a series of events that will showcase, promote and develop digital leaders and leadership across the heritage sector. Activities will attract and be of value to Trustees and Executive Leadership members from organisations that deliver heritage related activities from across the whole of the UK.
1. **Aims and Objectives**
	1. The aim of this commission is to provide a series of free events or activities that highlight, promote and develop digital leaders and leadership across the UK heritage sector.
	2. The primary focus of this commission is to promote good practice, raise discussion and facilitate networking in relation to digital leadership.
	3. The Digital Skills for Heritage initiative primarily targets and invests in small to medium sized organisations. To balance that, this commission should aim to support medium and large sized heritage organisations.
	4. The Tranche 2 [Taking Digital Forward](https://www.heritagefund.org.uk/funding/digital-skills-heritage-tranche-2-funding-taking-digital-forward) (T2) and Tranche 5 [Answering the Sector’s Digital Questions](https://www.heritagefund.org.uk/funding/digital-skills-heritage-tranche-5-funding-qa) (T5) projects in the *Digital Skills for Heritage* initiative include related leadership activities and resources. The successful bidder will coordinate with these project leads in order that *Digital Skills for Heritage* leadership resources and events can be promoted across projects wherever appropriate.
2. **Method**
	1. The specific approach will be determined by the successful bidder. We expect between 3-6 events to be held over a 5–6-month period, however we encourage bidders to design their approach, timings, type of event, location of event, and length of event in accordance with what they believe will best achieve the project outcomes.
	2. We cover the full breadth of natural, cultural and intangible heritage, across the UK. Accordingly, organisations in scope will include museums, libraries and archives, buildings and monuments, as well as those supporting natural heritage, cultural and community heritage. The successful bidder will explain how they plan to identify and recruit speakers and attendees and the steps they will make to ensure that attendees from across the UK and the heritage domains we support will benefit.
	3. We are committed to the delivery of equality, diversity and inclusion as outcomes. Our current [Strategic Funding Framework](https://www.heritagefund.org.uk/about/strategic-funding-framework-2019-2024) includes our mandatory outcome: “to involve a wider range of people in heritage”. The successful bidder will demonstrate how the event series will promote our mandatory inclusion outcome and embody the qualities of equality, diversity and inclusion in relation to digital leaders and leadership.
	4. The Fund is open to innovative and novel approaches to the event series. Events can take place in physical or digital spaces, or in a combination of these. Events can be standalone or attached to appropriate third-party events or conferences. Physical events should recognise our commitment to support and engage with the sector across the whole of the UK.
	5. The successful bidder will be expected to work with the National Lottery Heritage Fund’s communications team to ensure activities can be made best use of to promote the sector as a whole and the critical role that digital plays in its present and future.
	6. The successful bidder will be expected to provide a short final report evaluating the impact and success of the project. Evaluation will include as a minimum the basic metrics (numbers of attendees, heritage area, and geographic location) required by The Fund of all *Digital Skills for Heritage* initiative projects.
3. **Outputs**
	1. The following outputs will be required:
* An initial meeting
* The production of a full project plan
* The design, promotion and delivery of a series of events, in line with the more detailed requirements provided in the document
* Consultation with existing T2 and T5 *Digital Skills for Heritage* project leads working in relation to digital leadership resources and training events
* Discussion with and potentially collaboration with The Fund’s Marcomms Team on a concurrent series of articles featuring specific leaders, types of digital leadership or organised by some other appropriate theme. This may take the form of text, audio or include video clips. The successful bidder will provide or facilitate content as appropriate.
* Regular progress updates throughout the process, frequency and method to be agreed at the inception meeting with the successful provider.
* A draft project evaluation report, evidencing reach and impact, including participation and attendee evaluation data, and how the series has supported our commitment to equality, diversity and inclusion, for review and feedback
* A final project evaluation report.

A project plan with specific deliverables\* and timetable will be agreed with the successful consultant/ies. However, the Fund expects the following deliverables in accordance with the following timetable as a minimum:

|  |  |
| --- | --- |
| **Deliverable/Key Milestones\*** | **Due date** |
| Inception Meeting to agree plans, including reporting structures and a communication and dissemination strategy. | Week commencing 18 10 2021  |
| Fortnightly updates on response rates and any recommendations to ensure outcomes are achieved | Every month after the contract is awarded  |
| A short final report of 10 pages maximum for external publication  | No later than 30 09 2022 |

**The above represents our minimum requirements.**

**\* The Fund reserves the right to amend this timetable where required.**

* 1. Although the focus of this project is not on resource creation, any digital outputs produced should be made available under a Creative Commons Attribution 4.0 International (CC BY 4.0) licence.
	2. The successful bidder must comply with all the requirements of applicable UK and European Data Protection laws and shall ensure appropriate consents from attendees in terms of data collection or event participation.
	3. The successful bidder must take appropriate steps to ensure that events are accessible and that specific accessibility needs are appropriately addressed.
1. **Contract management**
	1. We expect the project to begin 18/10/2021 and be completed by 30/09/2022.
	2. The anticipated budget is a maximum of £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 agreed with the successful bidder at the project initiation meeting. The last payment will be on successful completion of the contract.
	4. The contract will be based on The Fund’s standard terms and conditions.
	5. The contract will be managed on a day-to-day basis for The Fund by Ruth Dench.
2. **Award Criteria**
	1. A proposal for undertaking the work should be a maximum of 10 pages and include:
* A short definition of digital leadership, as it applies to the series of events to be held
* a detailed method for undertaking the project, including an outline communications and stakeholder engagement plan
* Target engagement figures for unique attendees across all events
* An outline of evaluation including evaluation of networking opportunities or activities and the approach taken to equality, diversity and inclusion
* details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified
* the allocation of days between members of the team
* the daily charging rate of individual staff involved
* a timescale for carrying out the project
* an overall cost for the work

Your bid document must comply with basic accessibility standards (please see Appendix 1).

* 1. Your Bid will be scored out of 100%.

**70% of the 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. Describe how your organisation considers environmental issues as part of its business operations?
 | Weighting10% |
| 1. Describe how your organisation supports local community initiatives.
 | Weighting 10% |
| 1. To what extent does the tender response demonstrate an understanding of digital leadership across the heritage sector?

  | Weighing 10% |
| 1. What experience does the applicant have of running and evaluating high quality events and activities in relation to CEOs and Board Members of large organisations?
 | Weighting10% |
| 1. To what extent is the approach appropriate to the project requirements and available resource, including target participation rates?

  | Weighting10% |
| 1. To what extent does the approach support The Fund’s commitment to promoting equality, diversity and inclusion across the range of types of heritage supported by organisations across the UK?
 | Weighting10% |
| 1. How appropriate are the communications and stakeholder engagement plan to the project?

  | Weighting10% |

**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. |

**30% of 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 30%**

* 7 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% (7 marks) for price and the second placed bidder gets 27.6% and so on. (8/100 x 7 = 0.56 marks; 7-0.56 = 6.44 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/National Lottery 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.*

1. **Procurement Process**
	1. 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.
	2. The procurement timetable will be:
* Deadline for clarification questions: noon on 03/09/2021
* Tender return deadline: 20/09/2021 at 11.00am
* Clarification meetings\*\* may be held with shortlisted consultants and would take place on week commencing:04/10/2021
* The Fund will notify bidders of our procurement decision week commencing: 04/10/2021
* \*The Fund will upload response to clarification on Contracts Finder.  Please note that we will make the anonymised questions, and our responses to them, available to everyone on the Fund website.
* \*\*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.
	1. Your tender proposals must be sent electronically via e-mail before the tender return deadline of 11.00 am on the 20 09 2021 to the following contact:

Ruth.Dench@heritagefund.org.uk

* 1. Please visit The [Fund's website](https://www.heritagefund.org.uk/) for further information about the organisation.

**Appendix 1: Accessibility and formatting guidance**

The National Lottery Heritage 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 an 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**

Please ensure accessibility checks have been discussed and agreed with The Fund.

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.

**Acknowledgement**

All reports should acknowledge the Fund. Our logo can be found on the [Fund's website](http://ttps//www.heritagefund.org.uk/search?keys=Logos).

**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 submit your document as a Word file and PDF.

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