



23 October 2015

QUOTATION – Hall For Cornwall Activity Planner

Hall For Cornwall, would like to invite tenders from suitably experienced Heritage Activity Planning Consultants to develop an Activity Plan for inclusion in the Building Cornwall's National Theatre Project Round 2 HLF application.

The appointment is part of a major Heritage Lottery Fund (HLF), Arts Council England (ACE) and European Regional Development Fund (ERDF) funded capital project and the Activity Plan is required for the Round 2 capital funding bid to HLF and must be completed by 31 August 2016.

Please provide your most competitive price and all other relevant details.

1. Context

Our project will deliver a major conversion and restoration of the Grade II* City Hall in the centre of Truro Conservation Area. This site has been at the heart of Cornwall and Truro's political governance, social/entertainment and commercial life since 1809. The current buildings, originally designed by architect Charles Eales in 1847 have housed a market house, City Council Chambers and more recently the Hall For Cornwall theatre.

2. The Task

The Activity Plan is an essential document required by the HLF in Round 2 submissions. The aim of the Activity Plan is to ensure that projects are both 'people focused' and 'heritage focused'.

Hall For Cornwall is seeking a consultant to complete an Activity Plan which fully complies with current HLF guidelines on Activity Plans, as set out in their 'Planning Activities in Heritage Projects' <http://www.hlf.org.uk/activity-plan-guidance>. Experience of writing Activity Plans for HLF projects is, therefore, essential.

The consultant should produce a detailed Activity Plan, encompassing audience development and learning and participation, complete with an Action Plan for delivery.

It will feed into the project business plan, as part of the Second Round HLF Funding Application.

The role of the consultant will be to work with Hall For Cornwall to assimilate all of the required information, consult with Hall For Cornwall staff team and all relevant stakeholders, undertake detailed and informed analysis and produce an Activity Plan of the highest quality, meeting the needs of the targeted audiences, delivering the project's specified outcomes and meeting the specific requirements of the HLF.

An Interpretation and Activity Planning Group, consisting of key Hall For Cornwall staff, has been established to support the work of the consultants and provide on-going feedback.

The Activity Plan Consultants will also be required to report regularly to the Capital Working Group (CWG) which has the overview of the project and to which all project consultants report.

The Activity Plan consultants will also be supported by the Project Co-ordinator, who will help with internal and external communications, ensuring that there is good communication with other consultants and supporting the practicalities of consultation with the general public.

It is required that the Activity Plan consultant will work closely with the Interpretation Plan consultants (to be appointed) to ensure that the activity development relates fully to the Interpretation Plan.

It is also required that they work closely with the Hall For Cornwall's Volunteer Coordinator as aspects of the activity plan will involve volunteering.

Target audiences for the project:

- Children, families and young people
- School children and teachers
- College and university students
- People with disabilities and those at risk of discrimination, disadvantage and isolation
- Cornish identifiers
- Older people
- Volunteers
- Local community
- Business community in Truro
- Tourism and cultural sector staff
- Creative businesses working in the building's creative hub and café spaces
- Tourists

- Key Cornwall story-holders
- Young Farmers

The project will also have significant benefits for current and new volunteers who will be actively engaged in developing and delivering the project.

The consultant will be required to undertake the following:

A. Identify Target Audiences

- Liaise with the project team and staff team to ensure all necessary information is available to inform the development of the Activity Plan and identify any key gaps in information
- Review and analyse the strategic and policy context in relation to the attraction's learners and participants.
- Develop a detailed profile of the attractions' existing key learner and participant groups – (NB a detailed analysis of the current audiences of the Hall For Cornwall is available)
- Liaise closely with the Project Coordinator as the consultation and engagement strategy and activity are developed
- Liaise with Hall For Cornwall staff, community groups, education establishments and community development organisations to identify key target audiences
- Identify the key delivery and strategic partners related to each proposed target audience

B. Identify Activities

- Undertake a full and detailed analysis of each target audience proposed, profiling the specific learning and participation needs of each through a programme of detailed consultation
- Identify and research best practice examples to inform the development of interpretation, learning, volunteering and training proposals
- Explore and analyse the barriers to engagement; for example financial factors, cultural and attitudinal factors, interpretation, interactivity, capacity issues etc.
- Identify any existing gaps in consultation information available and design and coordinate a consultation programme to target under-represented audiences
- Work with staff at the Royal Cornwall Museum, Truro Cathedral and Truro City Council Chambers to explore the development of volunteer led tours of the Truro Conservation Area
- Work closely with the Interpretation Consultants (who are developing a phone app for the area) on the development of tours
- Work with the project team and Hall For Cornwall staff to develop the overarching aims and objectives for the Activity Plan, ensuring these align with business sustainability objectives

- Work with the project team and Hall For Cornwall staff to establish a number of pilot projects/activities focused on removing any identified barriers to learning and participation, developing a series of detailed case studies to assess the outcomes
- Work with the project team and Hall For Cornwall staff to identify a programme of activities to meet the needs of target audiences and deliver the specified outcomes of the project
- Liaise closely with the Interpretation Consultant to ensure that there is synergy between the Interpretation Plan and the Activity Plan and to ensure that they have accurate and timely information about target audiences' needs, derived from the consultation completed

C. Identify Resources

- Liaise with Volunteer Cornwall who are helping with recruitment of new volunteers
- Identify key tasks for volunteers in delivering the Activity Plan and identify their training and other support needs, working closely with Hall For Cornwall staff tasked with refreshing the management and co-ordination of volunteers
- Undertake a full assessment of the resources required for the development and delivery of the activities proposed in the Activity Plan, particularly in terms of staffing, training, volunteers, equipment and materials, recruitment, evaluation and consultation

D. Develop Activities Plan

- Set out in detail how the proposed activities link directly to the needs of the identified target audiences. Explore, for example, the rationale for the activity/what the audience needs/potential barriers to learning and participation and what activities will be provided to overcome these barriers and what are the measures for success
- Create a detailed budget for all costs and liaise with the Business Planning Consultant to ensure that the costs assigned here are fully aligned with the financial plan set out in the business plan
- Identify and discuss all management and organisation issues related to the Activity Plan
- Work with the HFC Marketing Team to ensure a fully resourced marketing strategy is in place
- Identify the specific evaluation measures to be put in place to effectively measure success, including a series of quantitative and qualitative targets in relation to activities and to integrate these into the Evaluation Plan
- Provide input and contribute to the delivery phase risk register
- Work with Hall For Cornwall staff team and other consultants to develop a highly detailed, timed Action Plan which fully complies with current HLF

guidelines on Activity Plans, as set out in their 'Planning Activities in Heritage Projects'

- Produce a dissemination strategy
- The Consultant will be responsible for the development of job descriptions and briefs for any further commissioned activity

3. Project Governance

Hall For Cornwall has created a robust project management system and established a clear set of governance procedures to oversee the project.

The Board of Trustees has ultimate responsibility for this capital development and for ensuring that the project is properly managed, that risks are mitigated and that the funders' investment is correctly used. The Board of Trustees receives progress reports from the Executive Subcommittee and from the Director, who is the Project Champion.

A Capital Working Group (CWG) has been set up to oversee the progress of the project, receiving inputs from project consultants and professional advisors from Cornwall Council. The working group comprises of:

Hall For Cornwall

- Julien Boast (Director)
- Sara Dauncey (Head of Finance)
- Project Coordinator (to be appointed)

Cornwall Council

- Julie Seyler (Culture Programme Manager)
- Tamsin Daniel (Culture Programme Officer)
- Len Smith (Strategic Programme Manager)
- Jordan Whaley (Strategic Programme Officer)

Project Manager

- James Wickett (SWEETT Group) - Chair

The key client contact throughout the procurement process is Siân Woods, Hall For Cornwall, and the contact for the duration of the contract will be the Project Co-ordinator (to be appointed).

4. Outputs

The consultant will deliver an Activity Plan for the project addressing all issues identified in the HLF Guide to Activity Plans.

A draft Activity Plan will be completed and submitted to the client on 1 August 2016, for consideration prior to the final Activity Plan. Completed sections of the plan will also be submitted for feedback as and when appropriate.

The consultant will be required to attend meetings as deemed appropriate by the client.

The consultant will make arrangements for the final publication of the Activity Plan, and will provide to the client:

- 4x bound colour copies of the main text and appendices in A4 format, illustrated as appropriate
- An electronic copy of the full report in PDF format and Microsoft Word on CD

5. Copyright

Hall For Cornwall will own the copyright of the final version of the report and all other supporting documentation and pilot project material.

The consultant should clear the copyright for any illustrations or other material used in both documents.

6. Budget

The maximum budget available for the project is £17,500, net of VAT and inclusive of all costs.

7. Timescales

The proposed key dates, subject to ACE and HLF capital funding timescales and planning process for this project are:

Deliverables & Key Dates	By
Invitations to tender issued	23 October 2015
Clarifications Deadline	Noon 28 October 2015
Response to clarifications issued	30 October 2015
Tender return deadline	15:00 6 November 2015
Tender evaluation	2 weeks
Tender award notification	20 November 2015
Inception Meeting and Briefing	To be agreed (December 2015)
Contract Begins	To be agreed (December 2015)
Draft Report	1 August 2016
Final Report	14 August 2016
End of Contract	31 August 2016

The engagement will commence in the Development Phase starting in December 2015 and finishing on 31 August 2016, in order to inform the business plan for an application for funding in October 2016.

Please note that the start date is reliant on a successful application to Heritage Lottery Fund being secured in November and contracting being completed in December.

8. Submission of Bids

Suitably experienced heritage learning specialists are invited to submit a proposal for this work. Your tender submission should include:

- Company information, to include; organisation name and address, phone and email contacts and web site details
- Proposed methodology to address the brief and achieve the required outputs
- Clarification on how the team will ensure that work is fully co-ordinated with the preparation of the Interpretation Plan in readiness for the HLF Round 2 application
- Details on how work will be managed to ensure proper liaison with the project team and with the Interpretation Design Team
- A summary of your approach to collaborative working and working with stakeholders, highlighting two or three relevant examples (on not more than two pages)
- Details of previous experience, and evidence of up to date knowledge and expertise, in the preparation and carrying out of activity planning work for arts/cultural/museum projects, preferably relating to listed buildings, including three examples of previous successfully delivered projects (not more than two pages each) at least one of which should be for an Activity Plan for an HLF project of a similar scale to the Hall For Cornwall project
- A detailed cost breakdown relating to the separate elements of the brief including hourly rates for all members of the team and all travel and other disbursement costs
- Information on your approach to risk management in the delivery of the brief
- Details of the proposed team structure, including CVs of key members of the team and their respective time commitment to the project
- Details of any subcontractors you intend to use, highlighting their relevant experience, the proposed portion of work you will be sub-contracting out, the costs associated with this work and how you intend to manage them
- Any additional services or specialist advice considered necessary or advisable to carry out the commission

- Exclusions to the Fee Offer to be clearly identified
- Please also demonstrate the team's ability to resource and deliver the work on time
- A preliminary programme detailing consultant tasks & key milestones
- Fee drawdown on monthly basis
- Details of last three years' accounts
- Evidence of Employers Liability (£5m), Public Liability (£5m) and Professional Indemnity (£1m) or confirmation that the insurances will be in place should you be successful

Please send your submission to Siân Woods, Company Administrator, Hall For Cornwall via email SianW@hallforcornwall.org.uk by the deadline identified in the table above with the subject heading;

"HFC Activity Planner Tender Submission - [ADD COMPANY NAME]"

9. Evaluation of Bids

Hall For Cornwall is seeking suitably experienced heritage learning specialists who can demonstrate the following qualities:

- High design standards and an ability to respond sensitively to the challenges of the project and the core values and aspirations of Hall For Cornwall
- Evidence of accurate and ambitious project development and an ability to work with diverse client bodies
- The strength of the proposed team and their approach to sustainability
- Experience of designing and delivering similar successful projects, particularly within the arts and culture sector but not necessarily involving listed buildings, and in sensitive historic settings
- The team should also be able to provide suitable references and evidence of appropriate indemnity and public liability insurance, health and safety and quality assurance and financial standing

The submission will be considered by an assessment panel consisting of representatives from Cornwall Council and HFC. The tender assessment will consider the most economically advantageous submission based on the information provided.

10. Invoicing Arrangements

Invoicing arrangements and payment terms will be agreed prior to contract.

11. Terms and Conditions

In the event that we decide to move forward with your company, an order shall be placed with you subject to Hall For Cornwall's standard Terms and Conditions of Purchase of Goods and Services (under £50,000) a copy of which will be sent to you on request.

Please contact the undersigned if you have any questions or queries.

Yours sincerely

A handwritten signature in blue ink, consisting of several overlapping loops and a long horizontal stroke extending to the right.

Siân Woods
Company Administrator, Directorate

E: SianW@hallforcornwall.org.uk

T: 01872 321969