# NHMF CONTRACT NUMBER 320

**Stakeholder Reputation Research**

**Organisation** **The National Heritage Memorial Fund**

**Department** Business Innovation and Insight

**Title of procurement Stakeholder reputation research**

**Brief description of supply** Insight into political stakeholder perceptions
across the UK and understanding of The National Lottery Heritage Fund and the impact of its work

**Estimated value of tender,** Range up to £24,000 inclusive VAT and expenses inclusive of VAT

**Estimated duration** Four months

**Name of the Fund Contact** Claire Flynn, Policy and Public Affairs
manager (Project Lead)

**Timetable** Deadline for clarification questions: 12 noon Tuesday 1 February 2022

 Response deadline: 12 noon Tuesday 8 February

Clarification meetings: Thursday 10 February

 Confirmation of contract: Friday 11 February

Completion of research: 31 May 2022

# 1. Overview

* 1. The National Lottery Heritage Fund, formerly the Heritage Lottery Fund (HLF), is an operating name for the Trustees of the National Heritage Memorial Fund (NHMF). In 1994 the NHMF was given authority under the National Lottery Act to distribute money raised by the National Lottery to support projects involving the national, regional and local heritage of the United Kingdom. In January 2019 we launched our current Strategic Framework: ‘Inspiring, leading and resourcing the UK’s heritage’. See The [Fund's website](https://www.heritagefund.org.uk/publications/strategic-funding-framework-2019-2024) 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. The Fund is now looking to gain insights on stakeholder perceptions, with a focus on Westminster and the devolved governments.
	4. In 2016/17, The Heritage Lottery Fund, as it was known then, commissioned Stakeholder reputation research, which looked at political audiences as well as policy makers and officials at UK government and local government level.
	5. We understand – both anecdotally and from other sources, such as customer care surveys and reports from our Regional and Country Committees, that The National Lottery Heritage Fund is well regarded in the heritage sector and by our customers. We know less about the views of those opinion-formers and collaborators who are further from us, but nonetheless important in terms of framing our future and the future of communities and heritage – what might be termed the ‘outer circle’ of influencers.
	6. As we begin to plan our next strategy, it seems timely to review The National Lottery Heritage Fund’s reputation and relevance to key political stakeholders and opinion-formers once again with a view to:
* Ascertaining government stakeholder awareness across the UK to include the UK Parliament, the Scottish Parliament, the Senedd and the Northern Ireland Assembly, perceptions of and understanding of The National Lottery Heritage Fund, including measuring and tracking reputation compared to other funders.
* To establish a baseline for The National Lottery Heritage Fund reputation among elected representatives in the House of Commons as well as the Scottish Parliament, the Senedd and the Northern Ireland Assembly.
* Understanding the relevance of heritage and The National Lottery Heritage Fund to these audiences and cross cutting agendas.
* To inform communications and advocacy priorities for engaging this group looking ahead.
* Understanding government stakeholders’ communication and engagement preferences in the UK Parliament, the Scottish Parliament, the Senedd and the Northern Ireland Assembly.
* Understand the reputational landscape in which The National Lottery Heritage Fund operates.
* We will use this research to draw out the priorities of key stakeholders and elected representatives to inform our decision making and the investment in the future of heritage.
* The research will inform our strategic engagement with elected representatives, in the UK Parliament, the Scottish Parliament, the Senedd and the Northern Ireland Assembly, by establishing a baseline for their opinion and understanding of The National Lottery Heritage Fund, our role and impact, and their view of heritage.
	1. As part of this exercise, it would be useful to:
* Explore awareness and perceptions of The National Lottery Heritage Fund both as both a key funder and a sectoral leader.
* Explore understanding of breadth of The National Lottery Heritage Fund funding and its relevance to cross cutting agendas.
* Investigate opinions on key current issues affecting the heritage sector.
* Gain views on the key challenges across stakeholders perceive for The National Lottery Heritage Fund and heritage over the next 3 - 4 years.
* Better understand media consumption habits and explore preferred ways of staying in touch/messages/content.
* Better understand activities and communications messages which will assist The National Lottery Heritage Fund maintain its reputation.
* Better understand the factors that identify key drivers of favourability and engagement with elected representatives to help build reputation, communications and public policy strategies that will achieve maximum impact.

The National Lottery Heritage Fund’s intention is to benchmark on an annual basis.

# Method

* 1. A method for the work is open for consultants to propose. However, we anticipate that it may include some of the following:
	+ We anticipate a quantitative approach in the form of online questionnaires/surveys but would welcome suggestions that take account of our aims, timeline and the need for a cost-effective solution.
	+ We would like to ask no less than six questions in the House of Commons, the Scottish Parliament, the Senedd and the Northern Ireland Assembly.
	+ For the UK Parliament in particular, we would like to have some additional analysis of specific sub-groups of MPs within the sample who are of the greatest interest to The National Lottery Heritage Fund (such as MPs who sit on specific committees and All-Party Parliamentary Groups) and analyse how their opinions compare against the wider sample.
	+ Questions will be drafted and signed off once the contract has been awarded.
	1. We would welcome research companies who can provide evidence that:
* Experience in carrying out research with political audiences across the UK.
* They can support for The National Lottery Heritage Fund in the drafting of survey questions to ensure it is making the best possible use of the question space.
* A representative sample across all four legislatures, reaching as many elected representatives as possible. For example, in Northern Ireland, to ensure that there is representation across all parties in the Northern Ireland Executive.
* Research findings will be used by The National Lottery Heritage Fund senior management and Board, and it may or may not be published – although we may want to share summary with participants and would welcome suggestions on this from the research company.

# Outputs

* 1. The following outputs will be required:
* a draft final report in word.
* a final report in word.
* any other reports as set out here or agreed between The Fund and the contractor; and
* a set of research data, to be stored in a readily accessible electronic format such as Excel
	1. All reports must adhere to The Fund’s accessibility and formatting guidance (appended). We also expect reports to follow a layout agreed with The Fund in advance of submission of any reports.
	2. We expect all our evaluations and research projects to generate evidence about the inclusivity of our funding and our performance in addressing inequality. Bidders must be committed to this principle and ensure evidence gathering addresses this requirement.
	3. The initial findings will be confidential to The Fund. The Fund may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.
	4. All reports to include appendices as agreed between The Fund and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in electronic format and hard copy if requested.
	5. The successful bidder must comply with all of the requirements of UK and European Data Protection Laws and shall ensure appropriate research consents from interviews or any data collection.
	6. The successful bidder will be expected to discuss and present findings at appropriate times, to internal and external audiences, including our Board, our Senior Management Team, Grantees, policy makers and other external stakeholders. The purpose of these presentations is to enable lessons to be learned and key policy and practice issues to be highlighted as the evaluation progresses.
	7. We expect all projects we fund to adhere to the Social Research Association (SRA) ethical guidelines. If your proposal raises ethical issues, you must indicate what they are and what your strategy for addressing them is.

# Contract management

* 1. We expect the research to begin 11 February 2022 and be completed by 31 May 2022. The final report shall be submitted to The Fund by 31 May 2022.
	2. The anticipated budget is £24,000 to include all expenses and VAT. The contract will be let by the trustees of The National Heritage Memorial Fund.
	3. The payment schedule will be 25% after the survey has gone to field with 75% remaining when the final report has been shared.
	4. The contract will be based on The Fund’s standard terms and conditions.
	5. The research will be managed on a day-to-day basis for The Fund by Claire Flynn, Policy and Public Affairs Manager. The work will be informed by an internal working group including colleagues from the research, policy and public affairs teams.

# Award Criteria

* 1. Bids 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:**

|  | Selection Criteria | Weighting |
| --- | --- | --- |
| 1 | **Demonstrated an understanding of the requirements under this ITT and issues related to this ITT.** **The response includes two examples of previous relevant work and explain how such relevant experience in stakeholder and political research will benefit in delivering the work under the ITT.** | 20% |
| 2 | **Demonstrated that the methodology selected are appropriate to the research requirements set out in this brief.** | 20% |
| 3 | **Demonstrated a clear and realistic project plan, showing phases of the research, tasks for each phase and roles and responsibilities for each member of the team.**  | 20% |
| 4 | **Demonstrated the suitability of the team, assigned roles and responsibilities and approach to performance and risk management.**  | 15% |
| 5 | **Demonstrated how the organisation would perform the contract to ensure that environmental impacts are reduced, and how you would monitor and measure this?** | 10% |
| 6 | **Demonstrated the bidder has the capacity and resources to carry out the research within the budget and timescale.** | 15% |

## 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%

* 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 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% (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 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.*

A proposal for undertaking the work should be a maximum of 10 pages and include:

* a detailed method for undertaking the study.
* 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; CVs, along with any other relevant information can be provided in appendices
* 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.

# 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. We are inviting submissions from a single organisation or a consortium to deliver all areas of this evaluation work. We anticipate two possible scenarios:

	The Fund appoints a single organisation, who has the capacity and skillset to deliver all aspects of this work; or

	A consortium is appointed, who together bring the required skills and resources to deliver all aspects of this work. We are open to proposals from consortia of organisations or individual consultants, where the appropriate measures in place to ensure clear lines of management and communication. Payment arrangements will be via a single organisation and these details should be included in the tender return.
	3. The procurement timetable will be:
* Deadline for clarification questions\*: [ 12 noon on Tuesday 1 February 2022]
* Tender return deadline: [12 noon on Tuesday 8 February 2022]
* Clarification meetings\*\* may be held with shortlisted consultants and would take place on: [Thursday 10 February]
* The Fund will notify bidders of our procurement decision: [Friday 11 February]
* \*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 noon on Tuesday 8February to the following contact:

Bii.Admin@heritagefund.org.uk

The National Lottery Heritage Fund

Mezzanine Floor

International House

1 St Katharine’s Way

London E1W 1UN

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

**Appendix: 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 **reports**, and all other documents that may be published online including the **tender submission** consultants should ensure that:

* The size of the font is at least 12pt.
* 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.

**Acknowledgement**

All reports should acknowledge The Fund. Our logo can be found on The Fund's website.

**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.