**Digital Skills Survey: Reviewing Progress against Baseline Data for Digital Skills in the Heritage Sector**

**Organisation:**  TheNational Lottery Heritage Fund

**Department:**  Business Innovation and Insight

**Title of procurement:** Identifying Baseline Data on Digital Skills in the Heritage sector (follow up survey)

**Brief description of supply:** Surveying services to establish the current level of digital skills and confidence of organisations within the UK’s heritage sector.

**Estimated value of tender:** Up to £60,000 inc. VAT

**Estimated duration:** 4 months

**Name of the Fund Contact:** Hilary Leavy

**Timetable**

Response deadline: 11.00 am on the 25/06/2021

Clarification question deadline: noon on15/06/2021

Clarification responses: 16/06/2021

Meeting with shortlisted applicants: 01/07/2021

Confirmation of contract: week commencing: 05/07/2021

Completion of research: 08/11/2021

Report publication date: 30/11/2021

1. **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. Building on work undertaken in 2020, [the Digital Attitudes and Skills for Heritage (DASH) survey and report](https://www.heritagefund.org.uk/publications/dash-report-learning-first-uk-wide-digital-heritage-survey), The Fund wishes to commission a survey and report. The 2020 DASH survey provided a baseline level of digital skills and confidence of organisations across the UK’s heritage sector. This project will build on that, identifying any change in capabilities that have taken place.
  4. Digital skills surveys and confidence measures are now routinely used across many sectors. These surveys collect and present data which provide a representative picture of strengths and weaknesses in relation to a defined set of digital competencies. This provides decision makers with information which can be used to support investment and planning at a sector wide level, and in relation to groups of organisations that are comparable by size, type, etc. Such surveys also enable measurement of the impact of interventions designed to develop workforce skills and organisational capacity over time.
  5. The Fund wishes to commission a survey of organisations that deliver heritage related activities in the UK that will include a representative sample of different types, sizes and locations of organisations. The survey will cover organisations in the south, centre and north of England, as well as Scotland, Wales and Northern Ireland. It will cover small, medium and large heritage organisations.
  6. 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, in relation to the DASH survey work undertaken in 2020, how they plan to build up a set of organisations to survey, and the steps they will make to try to ensure that the overall findings are reasonably representative.
  7. Several surveys and frameworks have been produced for overlapping cultural and charitable sectors, however the DASH survey represented the first sector-wide baseline digital competencies survey of the heritage sector. This commission therefore means to build on the first such benchmark of data on the state of digital skills in the United Kingdom’s heritage sector.
  8. The primary user of the data will be The National Lottery Heritage Fund. We will use this data to understand how the sector has continued to adopt digital in response to the impact of the COVID-19 pandemic, and to measure the progress of our work to build digital skills and competencies across the sector. The data will also help inform strategic and practical interventions carried out by us in future.
  9. An important secondary user will be stakeholders in the heritage sector with whom we will share findings once the research is complete. The stakeholders, varying from the government to umbrella bodies to individual heritage organisations will be able to use the data for a range of different purposes, including policy development, building organisational resilience and identifying training priorities.
  10. The final report should provide analysis and recommendations in relation to the current digital skills and confidence baseline and any identifiable changes between these findings and those outlined in the 2020 Dash survey report. Recommendations should be relevant to the different groups of stakeholders.

1. **Aims and Objectives**
   1. The aim of this research is to provide insight that informs The Fund’s future policy and strategy for digital skills in the sector and which further builds understanding of the digital capabilities of heritage organisations.
   2. The objectives of this piece of research are:
      1. To understand the current attitudes towards digital and the capabilities of the heritage sector in this area, one year on from our original survey.
      2. To produce a capabilities framework relating to the year one and year two research.
      3. To identify the changes in key survey metrics between the year one and year two research.
      4. To provide insight into the key factors that influence digital attitudes and skills within heritage organisations, drawing on a range of contextual data to accompany the survey.
      5. To work with The Fund to recommend a sustainable and cost-efficient method for ongoing research in this area, which would allow us to track any future changes in digital capabilities and to measure the impact of our activities in this field.
2. **Method**
   1. The specific survey method that will be used to collect data is open for consultants to propose. However, we anticipate that the successful contractor will agree the approach and questions in collaboration with The Fund and in relation to the existing question set. Any additional or alternative questions will be agreed after the contract is awarded, to ensure maximum collaboration between bidder and client.
   2. We ask that the consultant chooses a method that will enable future iterations to be carried out that will allow for measurement of change in sector skills against the baseline to provide year on year comparisons.
   3. We do not mandate a specific response rate but expect to see the successful bidder plan to substantially increase on the numbers surveyed last year (i.e. 4,120 staff, trustees and volunteers working at 281 heritage organisations). As per the 2020 survey, we would expect organisations to be representative of the diverse size, location and subject focus (i.e. museums, archives, parks and more) of the UK heritage sector.
   4. The data collected will allow The Fund to acquire an informed view of strengths and gaps in i.) the digital capacity and confidence of the workforce in the heritage sector ii.) digital leadership and strategy in the sector. These may be captured through self-reported confidence measures, and/or information on the ways that surveyed organisations do or do not use certain digital technologies, for example, to widen participation.
   5. In developing your method and responding to this brief, you should demonstrate how your proposal will meet the following methodological considerations:
      1. How you propose to construct a sample of heritage organisations for this research that will facilitate analysis of the sub-groups mentioned in 3.3 (organisation size, region and heritage sub-sector).
      2. How you will use existing Heritage Fund data and last year’s DASH survey results to construct this sample (see 3.6 below).
      3. Your communications approach to recruit the sample and the support you may need from The Fund in reaching particular audiences.
      4. How you will conduct analysis of the results from year 1 and year 2 samples.
      5. How your analysis will help The Fund to understand which changes that are observed between year 1 and year 2 results are significant.
      6. How to treat organisations who have benefited from the Digital Skills for Heritage campaign in your analysis (The Fund will supply data on these, see 3.8, below).
      7. How this wave of the research will support The Fund to run ongoing DASH surveys cost-effectively.
   6. The Fund will make records of the organisations that we have funded and details of the grants awarded available to the successful supplier. Data with common organisation identifiers is available from 2013 to 2020. For the purpose of writing their bid, potential suppliers can download and access this information via [The Fund’s 360 Giving website](http://grantnav.threesixtygiving.org/search?query=National+Lottery+Heritage+Fund&default_field=%2A&sort=_score+desc&fundingOrganizationMore=true&recipientOrganizationMore=true&recipientRegionNameMore=true&recipientDistrictNameMore=true&fundingOrganizationTSGTypeMore=true&currencyMore=true&awardYearMore=true&amountAwardedFixedMore=true).
   7. The Fund will supplement 360 Giving data for the successful supplier with records for 2020-21 and additional fields relating to each grant, including:
      1. heritage area/type
      2. organisation type
      3. heritage designation
      4. number of visitors to the asset or site supported, at point of application
      5. number of volunteers at point of application
      6. number of employees at point of application (for 2020 and 2021 applicants)
      7. email address for the most recent contact at the organisation.
   8. The datasets mentioned in paragraphs 3.6 and 3.7 provide details for around 7,000 unique organisations who have received at least one grant from The Fund between 2013 and 2020.
   9. We can also provide a more detailed dataset for all grants made under the digital campaign, to the successful provider.
3. **Outputs**
   1. The following outputs will be required:

* A survey questionnaire, building on the [2020 DASH survey question set and results](https://www.heritagefund.org.uk/publications/dash-report-learning-first-uk-wide-digital-heritage-survey)
* An appropriate collection method for participant and questionnaire data, taking in to account legal data management requirements
* A sign up process that allows The Fund to consult with the sector by asking one or two specific questions (you can see information about how we consulted with the sector via the survey sign up process last year in the survey report and in [this blog post](https://www.heritagefund.org.uk/blogs/digital-skills-heritage-receives-funding-boost))
* Regular progress updates throughout the process, frequency and method to be agreed at the inception meeting with the successful provider.
* A draft final report, capturing a picture of the sector
* A final report and recommendations, suitable for sharing and adhering to our accessibility requirements. Format to be agreed but likely to be Word and PDF.
* Recommendations for future waves of the research, including options for how The Fund can make efficiencies in the running of the DASH survey.
* A set of research data, to be stored in a readily accessible electronic format such as Excel, with appropriate data protection consents acquired
* Where appropriate, high level sign posting for questionnaire participants

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 12 July 2021 |
| Fortnightly updates on response rates and any recommendations to ensure outcomes are achieved | Every month after organisations are contacted |
| A final report, of 50 pages maximum, with structure agreed with the Fund | 08 November 2021 |

**The above represents our minimum requirements.**

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

* 1. The survey questions themselves are available under a Creative Commons Attribution 4.0 International (CC BY 4.0) licence. Any subsequent additions or adaptations should also be shared under CC BY 4.0.
  2. All reports must adhere to The Fund’s accessibility and formatting guidance (appended). We also expect reports to follow the layout advised in our evaluation guidance.
  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 digital formats.
  5. The successful bidder must comply with all of the requirements of applicable 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. The purpose of such 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 particular ethical issues, you must indicate what they are and what your strategy for addressing them is.

1. **Contract management**
   1. We expect the project to begin 06/07/2021 and be completed by 30/11/21.
   2. The anticipated budget is a maximum of £60,000 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 Hilary Leavy, Insight Manager.
2. **Award Criteria**
   1. A proposal for undertaking the work should be a maximum of 10 pages and include:

* a detailed method for undertaking the project;
* 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.
  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. To what extent does the tender response demonstrate an understanding of the issues related to this research brief? | Weighing  20% |
| 1. What experience does the applicant have of providing high quality, actionable analysis and recommendations in relation to digital skills research data? | Weighting  25% |
| 1. To what extent is the method appropriate to the research requirements and available resource, including anticipated response rates and methods to achieve this? | Weighting  20% |
| 1. What is the extent of the organisational experience of conducting similar social research in the Heritage and Cultural Sector? | Weighting  20% |
| 1. How appropriate are the skills and experience that the bidder will make available to the project? | Weighting  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%**

* 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 15/06/2021
* Tender return deadline: 25/06/2021 at 11.00am
* Clarification meetings\*\* may be held with shortlisted consultants and would take place on week commencing: 28/06/2021
* The Fund will notify bidders of our procurement decision week commencing: 05/07/2021
* \*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 25th of June 2021 to the following contact:

hilary.leavy@heritagefund.org.uk

* 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 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**

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.