



28<sup>th</sup> October 2019

## CONSULTANTS TO DELIVER A DIGITAL TRAINING PROGRAMME FOR A COHORT OF CEOS, DIRECTORS AND TRUSTEES FROM THE HERITAGE SECTOR

This document contains the clarification questions for The National Lottery Heritage Fund's Invitation to Tender.

Question	Response
Is this the first time you have conducted training of this nature?	Yes, this is the first time we have commissioned a Digital Leadership programme.
Can you share examples of training sessions/styles that have worked in the past (if they exist)?	This is the first time we have conducted training of this nature and so are unable to present examples of sessions and styles that have worked in the past. We want the successful supplier to draw on their experience and present evidence of sessions and styles that have worked well.
Can you give any sense of potential training attendees and locations?	The potential training attendees will be senior staff and non-executives from a range of heritage organisations. This will mean that their experience and confidence using digital may vary. We want to offer this programme to heritage organisations across the UK and so the locations of attendees will also vary.
What level of digital skills do you anticipate the recipients having or will it likely vary?	We are anticipating a range of skills.
What is the underlying objective/ambition behind this programme?	We believe that organisations cannot fully achieve their missions in the 21 <sup>st</sup> century without understanding the capabilities and the limits of digital. Our goal is to train a cohort of senior leaders, so that they can best deliver on the missions of their own heritage organisations.
What will success look like after year 1?	Digitally confident senior leaders will be able to make better strategic choices to deliver on their mission, than they would have been able to do otherwise. The training programme is a success and there is appetite to run another one.

Are you open to virtual training or would you like all sessions to be face to face?	We would welcome applications that supplement face to face sessions with virtual training, but it is important to note that we are targeting busy senior leaders and so any virtual work needs to be proportional.
Do we have any contact details for potential heritage sector leaders? Are we able to communicate with them via email, or phone?	We can assist the successful bidder in the discovery phase and will be able to introduce them to prospective members of the cohort and heritage sector leaders.
Does the Fund have an existing PR partner to promote the scheme to relevant sector publications?	The successful supplier will be able to work with our communications team to promote the scheme to relevant publications.
Are there other options for recruitment? Is there a general meeting for examples we could use to promote the programme?	The Fund want to work with the successful bidder to design an appropriate recruitment mechanism. We are not aware of any specific events of the kind identified in the question.
When individuals apply, is there functionality on the Fund's site to create forms, or would you be looking for the provider to set this up separate to your current systems?	The Fund will post a blog or news story on its own website that will link to an application form. The supplier should supply an application form using a GDPR-compliant technology of its choice.
The brief mentions training sessions will need to take place across the country – do you have any more guidance for this? Is it reasonable to assume for projects expenses that at least one session will take place in London while others may follow a national footprint?	We anticipate participants will be coming from across the UK and would like this to be reflected in the programme. We are not specifying where the sessions should take place but would prefer that we don't have all the sessions taking place in London.
As far as complying with Welsh Language Standards, in the past we have most commonly passed any handout materials to an in-house specialist for translation, but the sessions were delivered in English. Is this your expectation?	In order to comply with the Welsh Language Standards, if we have a Welsh speaking participant, we would need to provide materials in Welsh and would need a translator for the sessions. We have the capabilities to offer this in house and can discuss this with the successful applicant.
You mention digital engagement will be carried out by the Fund. Would this include reminders and follow ups from sessions?	The supplier is expected to carry out the great majority of project administration including direct communications with the people on the cohort, both before and after sessions.
We find that a hybrid training-coaching approach delivers better learning outcomes than a pure training approach and is easier for senior stakeholders to fit in with their busy schedules. This also helps participants engage with the material in line with their own organisation's context. Are you open to a hybrid approach if we can keep costs within the available budget?	We are open to all suggestions, as long as they are well described and within budget.
As part of your specification, you have requested that the chosen supplier "Design an appropriate recruitment mechanism to encourage people to apply, in conjunction with	Selection would be a joint process.

the Fund.” Please could we clarify whether the assessment / selection of the applications would be led by the National Lottery Heritage Fund or jointly?	
From any previous experience running funded programmes or projects, have you used any specific advertising platforms to ‘recruit’ participants i.e. online portal / advertising boards / social media platforms etc.? We are happy to suggest an approach for this if the answer is no.	We have never attempted to recruit a cohort like this before, so we do not have any relevant experience. However, we do have both networks and social media channels that we can offer as part of the process.
In the specification you have outlined that travel across the UK will be required. Assuming participants will be based in multiple locations across the UK, do you anticipate each leadership session taking place in the same location each time or rotated across different locations?	We anticipate that the programme will reflect the participants’ distributed locations. Venue locations therefore should be responsive, and may involve multiple locations, or one location that is suitable for all attendees. However, we do wish to ensure that events do not solely take place in London.
Please could you outline how we should complete the cost of the venue hire if the location for each session is unknown? Would you like us to suggest a set location / ‘hub’ locations and research suitable local venues?	We would like suppliers to suggest locations and provide estimates based on those locations. We understand these are estimates and that they may be subject to change as the cohort is recruited.
Please could you clarify if we need to complete the yellow fields within the ‘Service Contract’ document alongside our submission, or if this should be completed at a later date by the successful supplier only?	The services contract has been provided so that prospective suppliers can see the terms of the agreement before submitting a bid. There is no need to fill out this document and submit it. This will be completed by the successful bidder.
How do you define Medium and Large organisations?	Organisations with 20 staff or more, of any contract status.
You mention reaching 12 – 16 individuals as part of the cohort – how many organisations (roughly) do you seek to reach?	We hope that we reach as many medium and large eligible heritage organisations as possible.
We assume the reach is UK wide therefore the physical meet ups will grantees cover their own travel?	The reach is UK-wide, as attendees will be coming from Medium to Large organisations we would expect them to pay for their own travel to the sessions.
Based on what we find out during the discovery phase we may want to include people to deliver support who we don’t identify during the proposal stage – is this possible?	We were anticipating that this may be the case and this would be possible, we understand this makes the budgeting phase complicated but would suggest that bidders include a reasonable contingency for this based on estimates.
Are we required to submit the proposal in word format – the appendix mentions: Please submit your document as a word file. We wanted to clarify is this applies to proposals also?	Please submit your proposals as a word document or pdf.
Can you confirm that the supplier would need to manage the application process for the cohort? Or would the National Lottery Heritage Fund require applications to be sent directly to	The Fund will post a blog or news story on its own website that will link to an application form. The supplier should supply an application

<p>them, for the supplier to then review/assess? Please confirm if there are any requirements to use specific systems to manage the application process or whether the supplier could accept applications via email/a system of their choice.</p>	<p>form using GDPR-compliant technology of its choice.</p>
<p>Which provider(s) have you been working with for tranches 1 – 3?</p>	<p>For Tranche 1 we are working with the consultants Frankly, Green + Webb. We are not currently using a supplier for Tranche 2 or 3.</p>
<p>What would prompt you to choose a different / new provider for tranche 4?</p>	<p>Tranche 4 is a separate workstream from the others, and so we will assess suppliers based on their suitability to deliver it.</p>
<p>Do you want / expect alignment of messaging across different providers? If so, will access be given to provider contacts or content?</p>	<p>The Digital Campaign as a whole is promoting the use of digital across the heritage sector, we would want the provider to work with us on this message. We will be happy to share any relevant additional material with the supplier as needed.</p>
<p>Do you intend tranche 4 to involve any digital age learning delivery mechanisms?</p>	<p>We are happy for proposals to include this as long as this is delivered alongside physical workshops.</p>
<p>Do you have a learning platform to host and facilitate a digital age blended learning experience?</p>	<p>We do not.</p>
<p>Can you clarify the context for a response to helping ensure a ‘good pool of diverse applicants’ – is this diversity in terms of digital maturity, role, type of heritage organisation or the Equality Act’s protected characteristics? Or something else?</p>	<p>A good diverse pool of applicants refers to protected characteristics, we want this programme to be inclusive. This also refers to the digital maturity of organisations and the types of heritage organisations. We want this cohort to be a good representation of the heritage sector.</p>
<p>Do you have any limitations for durations of workshops based on availability, and likely geography, it would be beneficial for us to know upfront?</p>	<p>We do not have any limitations for the durations of the workshops, although we should emphasise the seniority of the participants and so we would need the duration to be reasonable. Our participants will be coming from across the UK and we would like the proposal to reflect that in the locations where workshops are hosted.</p>
<p>Who is expected to pay travel and accommodation expenses for cohort members (i.e. participants in the training?) Would that be the supplier, the participants themselves or the Fund?</p>	<p>For multi-day events we expect that accommodation will be paid for out of the supplier’s budget. Both travel to events, and accommodation for single day events will be covered by the participants.</p>
<p>We assume that catering for the sessions will be treated as a project expense, and as such needs to be covered from within the £50K budget. Is that correct?</p>	<p>Yes, catering will be treated as a project expense and will need to be budgeted.</p>
<p>Will the National Lottery Heritage Fund share the findings of the discovery work done to date so the supplier can build on work already done.</p>	<p>We can discuss the discovery phase with the successful supplier at the project initiation meeting. We are willing to provide information we have that would be relevant for this phase.</p>

Do you have a maximum cap on daily fee rates?	We do not have a cap but will be assessing applications on value for money.
The tender specifies that the project is to 'Design an appropriate recruitment mechanism... in conjunction with the fund.' Please could you let us know what your responsibilities will be in this activity?	The design and execution of the recruitment mechanism will be a joint endeavour between supplier and Fund, although we will expect the supplier to drive the work and supply the key ideas. The Fund will assist in the design and deliver, especially through our communications team.
With regards to Welsh language, please could you clarify what we would be expected to provide to facilitate this?	In order to comply with the Welsh Language Standards, we need to be able to provide the content to Welsh speakers if requested. We have internal staff who can assist in translating documents and translating in sessions. However, the successful supplier will need to provide us with materials with a reasonable amount of time for our colleagues to translate them.
Have you done digital training at any level of your organisation before? If so, please can you give us an overview of what has been done and how successful the programme(s) were? Any post training analysis will be useful.	We have not done any digital training at any level previously.
You specify there will be between 12 and 16 participants. What will be their geographical spread? This will help us to determine where the training would take place and how many separate training sessions would be required.	We will be advertising for participants across the UK, we will expect representation from Scotland, Wales, Northern Ireland and England.
We noticed that the National Lottery Heritage Fund has published an official digital guidance which was withdrawn in 2018. Is there a copy of this available for review?	The Digital Guidance was removed from the website as we plan to update it. Given that the Digital Guidance is out of date we do not think it will add value to share it.
Please expand upon this requirement – 'design an appropriate recruitment mechanism to encourage people to apply, in conjunction with the Fund' – would the Fund expect to handle logistics and admin around applications and recruitment of cohort members or would you prefer suppliers include that in project costs?	We would prefer suppliers to include this in their costs. The supplier would be expected to handle the logistics and administration, the Fund would want to develop the assessment criteria with the supplier and be involved in the decision making. The Fund's communications team will assist.
Do suppliers need to include any third party marketing / promotional costs (i.e. beyond the usual dissemination we would carry out within our existing networks and channels) for recruitment within the project budget or will the Fund support promotion amongst their network?	Suppliers do not need to include third party marketing and promotional costs, the Fund will support promotion amongst our networks and through our channels. The successful supplier will be asked to work with our communications team to make sure this is successful.
Does the £50K project budget need to include all travel and accommodation costs for cohort members?	For multi-day events we expect that accommodation will be paid for out of the supplier's budget. Both travel to events, and accommodation for single day events will be covered by the participants.

<p>Please confirm this 'Please do not include supplier travel and accommodation expenses in these calculations, as they will be directly covered by the Fund' is definitely the case as I seems unusual. If so, would it apply to all travel and accommodation expenses for suppliers, i.e. team meetings, if working in a partnership as well as leadership cohort events?</p>	<p>This would not apply to team meetings if suppliers are planning to work together. This will cover travel and accommodation to attend the face to face sessions. These can be claimed as expenses to the Fund, however these costs must align with the Funds expenses policy and be agreed in advance. The policy will be shared with the successful supplier at the project initiation meeting.</p>
<p>Do guest speakers and experts count as 'suppliers' in this context or do we include their travel and accommodation within the project budget?</p>	<p>Guest speakers and experts do not count as suppliers, their travel and accommodation must be included within the budget.</p>
<p>What proportion of written recruitment material, workshop material and/or programme findings need to be translated into Welsh?</p>	<p>If we have Welsh speaking participants we would expect all the materials to be translated, just as we would with any accessibility requirement. The translation can be done in house at the Fund, suppliers will need to factor this into their timetables.</p>
<p>Does any face-to-face programme delivery need to be offered in Welsh?</p>	<p>If we have a Welsh speaking participant we would expect in-meeting translation but our in house team can assist with this.</p>
<p>Do we need to include any of those Welsh Language translation costs within the £50K budget? If so, does the Fund have preferred or in-house translators and are you able to give indicative costs for those?</p>	<p>We have internal staff who can assist with the provision of welsh translation skills. That said, if suppliers are planning to do anything particularly bespoke or where they would require materials to be professionally printed etc. they would need to factor in the printing of Welsh copies.</p>
<p>Please expand upon this requirement – 'Record and analyse the findings from the programme' – does the project require suppliers to produce a report for publication or is this for internal use only?</p>	<p>The project does require suppliers to produce a report at the end of the Programme outlining what took place and lessons learned. The publication of this document can be discussed with the successful supplier.</p>
<p>The brief requires the supplier 'work with the Fund's evaluation specialists' – please indicate the approximate amount of liaison required and whether this commission requires a separate budget line for independent evaluation, in addition to our own specialists.</p>	<p>The successful supplier will need to have a discussion with our evaluation colleague at the project initiation meeting. They would then be expected to liaise with them after the discovery process and work with the Fund to determine the best method for evaluation. Further liaison would depend on what was agreed. There does not need to be a budget line for independent evaluation.</p>
<p>Is there a required/set budget contingency percentage for this commission?</p>	<p>No, this is up to the supplier, we would anticipate the budget to have some contingency, especially as spend may vary after the discovery phase.</p>

