The Heritage Lottery Fund and Housing

**Organisation Heritage Lottery Fund**

**Department** Strategy & Business Development

**Title of procurement The Heritage Lottery Fund and Housing (Fin No.201)**

**Brief description of supply** Investigate the potential, and develop ideas, for the Heritage Lottery Fund to contribute new housing supply across the UK

**Estimated value of tender** £25,000 incl. VAT

**Estimated duration** Two months

**Name of HLF Contact** Amelia Robinson, Research Manager

**Timetable** Response deadline: 15th May

 Confirmation of contract: 22nd May

Completion of research: 31st July

# 1. Overview

1. 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). Since April 2013 we have been operating under our current Strategic Framework: ‘A lasting difference for heritage and people’. See the [HLF website](http://www.hlf.org.uk/aboutus/whatwedo/Pages/StrategicFramework2013to2018.aspx) for more details.
	1. HLF is currently embarking on preparations for its fifth strategic plan period, which will run from 2019 to 2024.
	2. HLF invests in the full breadth of the UK’s heritage and through our funding we have consistently sought ways to connect heritage to pressing social issues. Past examples are our [Heritage Enterprise](https://www.hlf.org.uk/looking-funding/our-grant-programmes/heritage-enterprise), [Skills for the Future](https://www.hlf.org.uk/looking-funding/our-grant-programmes/skills-future), [Townscape Heritage](https://www.hlf.org.uk/looking-funding/our-grant-programmes/townscape-heritage) and [Parks for People](https://www.hlf.org.uk/looking-funding/our-grant-programmes/parks-people) programmes.
	3. One current issue that we are interested in investigating is whether the UK’s urgent need to increase the supply of new homes should be a funding priority for HLF. A recent public consultation we carried out with National Lottery players confirmed that concerns about the lack of affordable housing was a key issue for them – and they did see HLF as being able to help, through funding for the re-use of historic buildings.
	4. We are aware of the scale of the national housing issue, and any role we play will be constrained by the limited budget we have available for funding new projects. Nevertheless, we believe there may be a meaningful role that we can play, and this research brief is to help us investigate ideas further.
	5. We would like to commission a series of think pieces on the topic of ‘Developing an ambitious role for the Heritage Lottery Fund in creating new housing supply across the UK.’ From the ideas submitted in response to this brief, we will commission up to five for fuller research and development. These five will be provided with a budget of £5,000 incl. VAT, to develop their idea. In addition, there may be further related commissions based upon submissions.
	6. We are inviting the submission of proposals, which should include the following details: -
* A summary of the idea
* The issues which require further investigation
* An approach to carrying out the work
* Details of the team that will undertake the work
* Day rates of team members and Discounts %
	1. The results of the analysis will be used to help HLF develop its strategy in the future around housing.
	2. We anticipate there will be the opportunity for further joint work around any ideas we decide to progress.

# 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 HLF and the contractor; and
* if relevant, sets of research data, to be stored in a readily accessible electronic format such as Excel.
	1. All reports must adhere to HLF’s accessibility and formatting guidance (appended).
	2. The initial findings will be confidential to HLF. HLF may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.
	3. All reports to include appendices as agreed between HLF 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.
	4. All bidders are required to adhere to all appropriate regulations and guidelines on the collection, storage, transmission and destruction of personal data ([MRS/SRA, Data Protection Act 1998: Guidelines for Social Research, April 2013](https://www.mrs.org.uk/pdf/2013-04-23%20MRS%20SRA%20-%20DP%20Guidelines%20updated.pdf)).

# Contract management

* 1. We expect the research/evaluation to begin in May 2017 and be completed by the end of July. Final reports to be submitted to HLF by 31st July 2017.
	2. The anticipated budget for each commissioned piece of work is £5,000 to include all expenses and VAT. The total budget we have available for all the commissioned work is anticipated to be £25,000. The contract will be let by the National Heritage Memorial Fund.
	3. The payment schedule will be full fee paid on completion of the contract.
	4. The contract will be based on the HLF standard terms and conditions, which include the requirement of Professional Indemnity Insurance (not less than £250,000 cover) and Public Liability Insurance of £1,000,000.
	5. The research will be managed on a day to day basis for HLF by Amelia Robinson, Research Manager.

# Award Criteria

* 1. A proposal for undertaking the work should include:
* A summary of the idea
* The issues which require further investigation
* An approach to carrying out the work
* 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.

Tender responses submitted will be assessed by HLF against the following: -

 Quality Questions:-

1. To what extent does the tender response demonstrate an understanding of the issues related to this research brief?
2. To what extent is the method appropriate to the research requirements set out in this brief?
3. What is the extent of the experience of similar heritage and social research?
4. How well has the tenderer structured a research team in order to successfully manage the contract and deliver the required work to the budget and timetable required by HLF.

Price Table

1. Prices agreed with the Bidders will be fixed for all work relating to their submissions until 31st March 2018.
2. Bidders may wish to offer a discount against Day rates should total commissions up to the 31st March 2018 exceed 15 days.
3. Bidders Discount Day rate for more than 15 days commissioned = …….%

**TABLE A: (firm and fixed costs)**

| **Cost** | **Post 1 @cost per day****(No of days)***e.g. Project Manager/ Director**@ £25.00* | **Post 2 @cost per day****(No of days)***e.g. Senior Consultant/manager/researcher**@£10.00* | **Post 3 @cost per day****(No of days)***Junior* *Consultant/equivalent* *e.g. £5.00* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Fund | *e.g. 0.5* | *1* | *1.5* | *3* | *30.00* |
| *[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: HLF reserves the right to reject abnormally low tenders. HLF 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.*

# Procurement Process

* 1. HLF reserves the right to reject abnormally low tenders and to negotiate with all bidders. HLF reserves the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.
	2. The procurement timetable will be:

Tender return deadline: completed proposal to be returned to HLF by 5pm Monday 15th May.

Submission clarification & negotiation period 16th to 19th May.

HLF will notify bidders of our procurement decision by 5 pm Friday 19th May*.*

4Your tender proposals must be sent electronically via e-mail before the tender return deadline of 5pm 15th May to the following contact:

Amelia Robinson

Heritage Lottery Fund

Holbein Place

London

SW1W 8NL

Amelia.robinson@hlf.org.uk

* 1. Please visit the [HLF website](http://www.hlf.org.uk/Pages/Home.aspx) for further information about the organisation.

# Appendix: Accessibility and formatting guidance

HLF is committed to providing a website that is accessible to the widest possible audience. Our website is annually tested by accessibility auditors and we must meet the WCAG 2.0 AA compliance level. Our accessibility testing covers all of our content, including downloadable documents, as well as the design and functionality of the site.

Reports and other documents created for HLF (**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. Tips for creating accessible documents can be found below. However, we strongly recommend referring to the RNIB, Gov.uk and WebAIM for more detailed information.

## 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

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.

### 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 also be simple, and include a descriptive title.

### 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 HLF. Our logo can be found on the [HLF website](http://www.hlf.org.uk/grantholders/acknowledgement/Pages/Logosandacknowledgement.aspx).

### Further resources

Please refer to the links below for further information:

* ['Microsoft Word: creating accessible documents' - webaim.org](http://webaim.org/techniques/word/)
* ['How to create an accessible PDF' - GOV.UK](https://www.gov.uk/guidance/how-to-publish-on-gov-uk/accessible-pdfs)

We also recommend using an accessibility consultant to help you produce your reports. Agencies that HLF have worked with include [Shaw Trust](http://webacc.shaw-trust.org.uk/) and [The Accessible Digital Documents Company](http://www.accessible-digital-documents.com/).

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