# The National Lottery Heritage Fund

# CONTRACT NUMBER NHMF312

# HERITAGE FILMMAKERS FRAMEWORK

**Organisation:** National Heritage Memorial Fund (“Heritage Fund”)

**Department:** Business Innovation & Insight

**Title of procurement:** Heritage Filmmakers Framework

**Brief description of supply:** We commissions videos to tell the story of the heritage, people and places that benefit from our funding. On average, we commission around six-12 short films each year. We are looking to recruit a small group of filmmakers to draw on for these commissions over the next two years.

**Estimated value of tender:** Up to £75,000 over the two year period (EXCLUSIVE OF VAT)

**Estimated duration:** Up to 31 March 2024

**Heritage Fund contact:** Name: Amy Freeborn, Head of Content and Digital

Email: amy.freeborn@heritagefund.org.uk

**Timetable:**  Response deadline: 21st March 2022 11am

Email clarification questions by: 9th March 2022

Clarification answers posted on Contracts Finder by: 11th March 2022

Clarifications/interviews if needed: 25th March 2022

Confirmation of contract: 29th March 2022

Commencement of contract: 11th April 2022

Completion of contract: 31 March 2024

## 1. Introduction

The National Lottery Heritage Fund (formerly the Heritage Lottery Fund) 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. More recently, we’ve also been distributing funds on behalf of governments across the UK. We operate under the auspices of the National Heritage Memorial Fund.

## 2. Background - Context and Roles

The Heritage 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 which underpin our grant-making and the objectives set out in our [Strategic Funding Framework 2019-2024](https://www.heritagefund.org.uk/about/strategic-funding-framework-2019-2024).

To communicate that lasting difference, we often commission videos to tell the story of the heritage, people and places that benefit from our funding. On average, we commission around six-12 short films each year.

We are looking to recruit a small group of filmmakers (“Suppliers”) to draw on for these commissions.

The Goods and/or Services required are the production of professional films, generally within the heritage and culture market sector.

This includes but is not limited to:

* developing ideas into a visual or written brief and providing advice and support on film concepts
* responding to briefs provided by the Heritage Fund and presenting work in progress
* visiting heritage sites (sometimes independently) to record footage, interviews, etc
* editing raw footage and other assets into professional films for website, social media and event/broadcast purposes
* ensuring all work complies with Heritage Fund brand guidelines and house style, including accessibility considerations
* conforming to budgets and undertaking any billing requirements
* managing raw and finished video footage and assets (digital and/or otherwise) in a safe, accessible environment for seven years
* providing a nominated contact to manage the relationship between the Heritage Fund and the Supplier under this framework agreement, to resolve any issues and to implement any improvements/innovations during the framework period
* complying with Heritage Fund policies and other requirements, such as our Equality, Diversity and Inclusion policy, Health and Safety policy and Information Security Policy (as well as any of the Heritage Fund’s grantees’ policies as communicated from time to time)

As part of the supply of the Goods and/or Services to the Heritage Fund, the Suppliers may also be required to:

* work within sensitive historic and/or natural environments and/or with sensitive material
* work with individuals with special needs
* work with professionals from heritage or other grantee organisations

## 4. Contract management

The contract period (term) will be from 1 April 2022 to 31 March 2024 inclusive.

It is difficult to predict the value of the Goods and/or Services that will be provided through this procurement as it will respond to the size and complexity of activity the Heritage Fund delivers from year to year. However, we do not anticipate the total value of commissions to exceed £75,000 (excluding VAT) over the two year term.

We intend to create up to approximately five Supplier contracts with organisations/partnerships/sole traders/etc. Each contract may have up to four named individuals. We expect the maximum value of an individual contract not to exceed £25,000 (excluding VAT) over the two year term. We make no guarantees to provide any work to the Suppliers selected.

If a named individual, who has been included in the contract agreement, leaves the employment of the Supplier during the term of the agreement, the Heritage Fund may, at its sole discretion, permit the Supplier to make a tender submission for a new individual to take their place. Any such application will be subject to the same terms and conditions as set out in this Invitation to Tender.

The contracts will be based on the Heritage Fund’s standard Terms and Conditions (uploaded on Contract Finder)

In undertaking any work, appointed Suppliers will need to abide by the Heritage Fund’s relevant policies, including but not limited to our Equality, Diversity and Inclusion policy, Health and Safety policy and Information Security Policy (as well as any of the Heritage Fund’s grantees’ policies as communicated from time to time). Copies of Heritage Fund policies will be provided to successful Bidders.

### Ordering process

In awarding any commission/placing orders to a Supplier, the Heritage Fund shall consider the nature and scope of the Goods and/or Services it requires to be carried out and completed, the complexity of those Goods and/or Services and the relevant experience of the Suppliers as set out in the Tender Bid questions and supporting information submitted by the Supplier. Commissions will be awarded on this basis.

We reserve the right to award a commission/place an order outside of the contracted Suppliers should we deem it necessary.

## 5. Evaluation scoring

To apply for this Heritage Filmmakers Framework, you must complete the Tender Bid questions and supporting information (below). The purpose of these questions and supporting information is for the Bidder to provide sufficient information for the Heritage Fund to decide whether the individual(s) proposed have demonstrated the skills, knowledge and experience required at a reasonable cost to be included in the framework.

You may respond as an individual or as an organisation/partnership. Organisations and partnerships should nominate one lead individual as the contact for the Bid. Individuals from winning Bids will not be eligible to take up commissions until they have participated in an induction session (which may be in person or virtual).

The Tender Bid questions and supporting information require examples taken from your professional and/or personal experience. Please note that we will disregard any text that exceeds our specified word/page limits.

### Tender Bid questions and supporting information

The tender application is split into four parts: contacts, competency, geography and price.

Contacts:

* Please provide the name(s) of up to four named individuals along with details of where they are based.
* Please indicate which person is the lead contact and include an email address and phone number for them.

Competency:

* In 500 words of less, tell us why you/your organisation/partnership should be chosen for this framework. Please include examples of how you’ve managed heritage or culture film projects previously, and detail such as how you’ve tailored films to different audiences, how you’ve overcome challenges on film projects and any innovative ideas and techniques you’ve used to help your films stand out from the crowd.
* submit a CV (up to two pages) for each individual named in your Bid
* submit a portfolio of at least three films or link to a gallery showing at least three films that are demonstrative of the style and quality of the work of the organisation/partnership/individual

Geography:

* Identify which areas you cover and/or are able to comfortably travel to for a day’s filming without incurring considerable travel or accommodation expenses. (Please note, we’re not interested here in willingness to travel for a commission, but ensuring we have a breadth of Suppliers across the whole of the UK.):
* Scotland
* Wales
* Northern Ireland
* England
  + North
  + South

Price:

* Please provide us with your day rates for:
* directing/producing
* filming/camera operation
* editing

### Weightings

Your Bid will be scored out of 100, based on your responses to the competency and pricing responses in the Tender Bid questions and supporting information. 70 marks will be awarded for competency and 30 marks will be awarded for price.

#### Qualitative scoring

Each of the scored criteria carry a weighting to be applied in the scoring matrix. These have been allocated by the selection team and are shown in the table below.

Bidders must score a minimum of 3 in each competency criteria to proceed to having their price score considered.

| Competency criteria | Weighting |
| --- | --- |
| 500-word summary | 30 |
| Three films to view | 20 |
| CV(s) of proposed people | 20 |

The top scoring Bidders will be shortlisted for the contract until the maximum estimated number of Bidders to be shortlisted for the contract, and a strong geographical range, is reached.

The Heritage Fund reserves the right to conduct interviews/clarifications with shortlisted Bidders and adjust scores accordingly.

##### Scoring methodology

This table shows the approach to marking that will be used for competency criteria:

|  |  |  |
| --- | --- | --- |
| Score | Rating | Explanation |
| 0 | Poor | No response or partial response and poor evidence provided in support of it. Does not give the Heritage 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  MINIMUIM REQUIREMENT | Response is comprehensive and supported by good standard of evidence. Gives the Heritage Fund confidence in the ability of the Bidder to deliver the contract. Meets the Heritage Fund’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the Heritage Fund a high level of confidence in the ability of the Bidder to deliver the contract. Exceeds the Heritage Fund’s requirements in some respects. |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the Heritage Fund a very high level of confidence in the ability of the Bidder to deliver the contract. Exceeds the Heritage Fund’s requirements in most respects. |

#### Price criteria

30% of total marks will be awarded for price. The evaluation of price will be carried out on the day rates you provide. Price will only be considered for Bidders who score a minimum of 3 for each competency criteria.

##### Price criterion at 30%

30 marks will be awarded to the lowest daily rates and the remaining Bidders will be allocated scores based on their deviation from this figure. Your daily rates provided will be used to score this question.

For example, if the lowest daily rate is £300 and the second lowest daily rate is £360, then the lowest priced Bidder gets 30 (full marks) for price and the second placed Bidder scores 24 and so on. (60/300 x 30 = 6 marks; 30-6 = 24 marks)

The scores for quality and price will be added together to obtain the overall score for each Bidder.

The overall score may be adjusted following an interview/clarification with the Bidder.

Please complete the above Tender Bid questions and supporting information, providing your daily rates in pounds sterling and:

* Inclusive of VAT, where levied. Please provide your VAT status. State “Not levied” if that is the case.
* inclusive of all photocopying, mailing, printing and other administrative costs
* exclusive of travel and subsistence

The Heritage Fund will pay reasonable travel and accommodation expenses only as per the service contract Ts&Cs.

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.

Notes: The Heritage Fund reserves the right to clarify quality and prices and to exclude tenders that demonstrate an abnormally low price response.

The Heritage Fund is committed to ensuring that any Bidder appointed to the agreement will not suffer any disadvantage because of a protected characteristic and will make all reasonable adjustments necessary in line with equality legislation to ensure they have an equal opportunity to provide the Goods and/or Services.

## 6. Procurement process

The Heritage Fund reserves the right not to appoint and to achieve our desired outcomes through other methods.

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 Heritage Fund’s and Bidder’s resources are used appropriately, we will only invite those Bidders who are close to the required quality/price threshold score to attend a clarification/interview meeting. Scores will be moderated based on any clarifications provided during this meeting. You are responsible for all your expenses when attending such meetings.

### Procurement timetable

Response deadline: 21st March 2022 11am

Email clarification questions by: 9th March 2022

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Completion of contract: 31 March 2024

### Tender Returns

Your tender proposals must be sent electronically via email before the tender return deadline of **21st March 2022 at 11am** to the following contact:

NAME: Amy Freeborn

Email: amy.freeborn@heritagefund.org.uk

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

## Appendix: Accessibility and formatting guidance

The 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 Heritage 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 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, ie: 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 (eg: 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.

## 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 Heritage Fund

Please check the accessibility of your document using the Word accessibility checker before submitting. Click: File – Info – Check for Issues – Check Accessibility.

Please submit your document as a Word file.

The Heritage Fund retains the right to amend documents in order to create accessible versions for publishing.