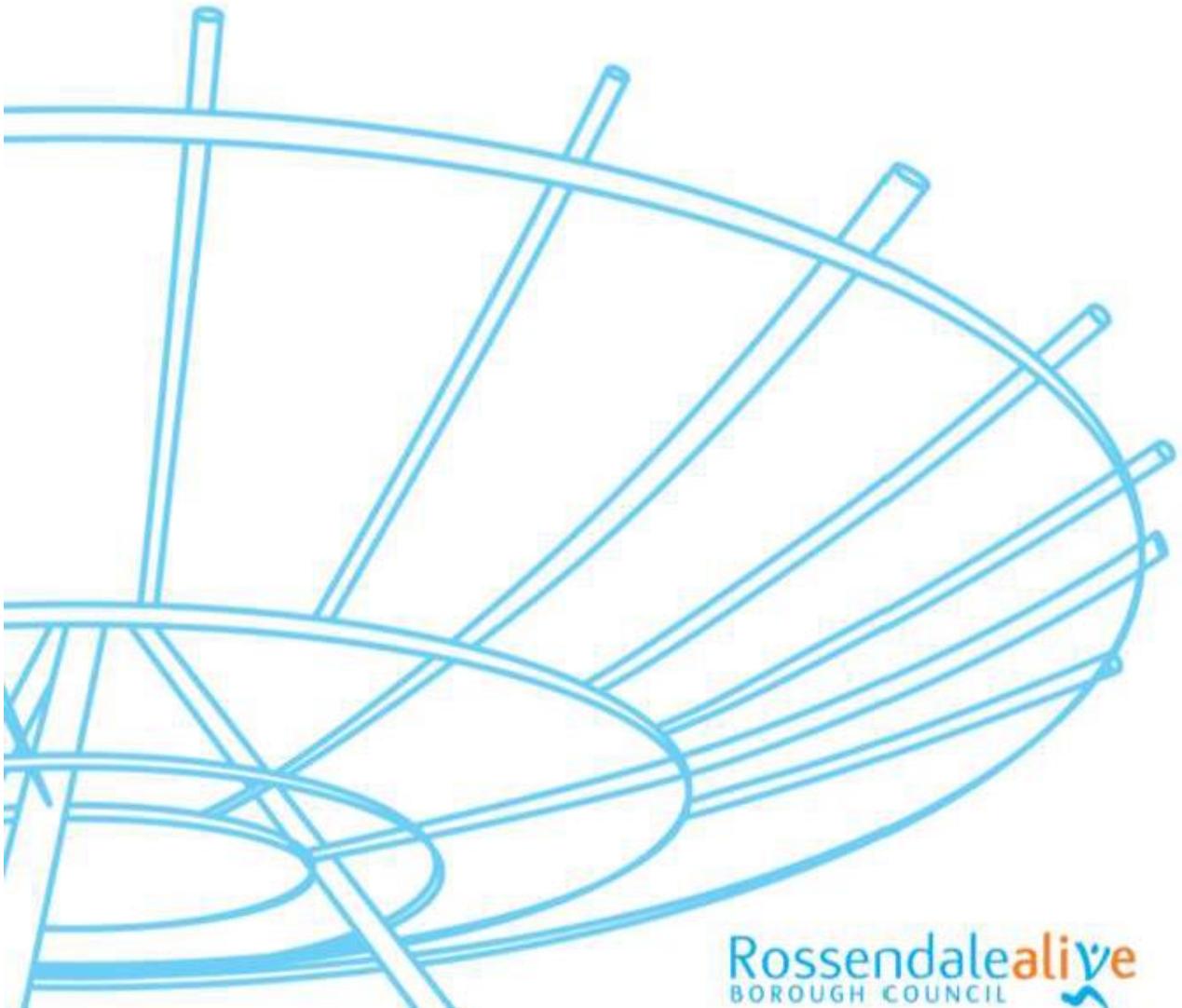


Rossendale Borough Council

INVITATION TO TENDER FOR

**Audience Development Plan and Activity Plan – Whitaker Museum, Heritage Lottery
Fund, for Delivery Stage 2 Application**

INSTRUCTIONS AND DETAILS OF CONTRACT



Introduction

Rossendale Borough Council (RBC) is seeking tenders from competent Audience Development and Activity Plan and museum specialists for the Whitaker Experience (HLF barn and stables project), to appoint a consultant (or consultant team) to produce an audience development plan and to facilitate the production of an activity plan to support a Round 2 application to the Heritage Lottery Fund.

The audience development plan and activity plan aim:

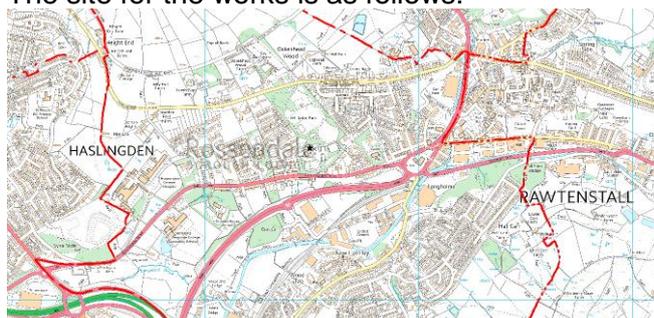
- to promote the site as a Cultural gateway to East Lancashire
- Increase the commitment and engagement of existing audiences through more frequent or more active involvement
- Attract new and wider audiences
- To develop a strong Collection and Heritage based Activity programme
- To support sustainable Activity sessions
- Achieve a Plan towards sustainable and long term visitor involvement
- Promote the 'Whitaker Experience' as a broad Cultural experience

This work will be carried out in conjunction with the business planning process which will consider how the future sustainability of the service can be developed through charging, commercial services and other means.

The activity plan will describe in detail the work we plan to do to engage people with our project. It will be developed using a methodology expected during an HLF development phase. It will build on existing research carried out by the Whitaker and test and review our ideas and thinking to ensure a high quality programme of public engagement which meets the needs of our audiences and can be sustained in the longer term. Included is the production of a Consultation Strategy which will be suitable for submission with the Planning Application. Working pro-actively with the Whitaker directors whilst involving staff, volunteers, stakeholders and potential audiences in its development is key.

Area Information

The site for the works is as follows:





The Contractor must, before tendering, ascertain the ethos, aspirations and vision of the Whitaker Museum. They should be familiar with Activities plans in similar settings and be aware of the type of work required. No claim at a later date will be considered on the grounds of lack of knowledge of the area or the museum. The Contractor shall be deemed to have obtained for itself all necessary information as to risks and any other circumstances which might reasonably influence or affect the Contractor's tender.

Background to the Project: The Whitaker Experience: our Heritage, our Stories, our Rossendale

Rossendale Valley played an important role in the industrial revolution., wool, cotton and later slipper and shoes were exported worldwide. The House, Stables and parklands were left to the people of Rossendale by Richard Whitaker. In the ownership of Rossendale Borough Council, the Whitaker museum was managed by Lancashire County Council until 2013 when the current consortium were awarded the tender for its management. Following the successful HLF Stage 1 bid the team is currently working towards the Stage 2 application proposed for November 2018. The bid includes the development of the adjacent barn, currently being used as a maintenance depot, into the vital additional space, critical to house the museum Collection at risk and to fulfill the future expansion plans and secure a sustainable future for The Whitaker. Key to this is the appointment of an Audience Development and Activity Plan specialist to guide the team and develop the associated HLF bid documents.

The Whitaker Project: connecting people to their past, their present and their future.

Our partnership will create a haven of local heritage and cultural experiences. Concentrating on people's stories, our collection and wider community involvement.

Physically transforming the adjacent Barn and Stables and creating one larger destination point.

We have fundamental aims of:

- Protecting the current collection from further deterioration
- Expanding our collection policy and safeguarding those items currently at risk
- Saving the vacated Victorian barn and stables
- Developing a sustainable model of business on the extended site

In order to address these aims the planned project outcomes will:

- Put visitors (old and new) at the centre of the development
- Deliver our comprehensive Activity Plan (including a maintenance, re-interpretation plan for the collection and consultation element)
- Secure and develop the Barn and stables site (including a number of out buildings and green area)
- Integrate the Parkland into the Heritage offer
- Extend current commercial offer via function, exhibition and educational spaces
- Develop a more professional Volunteer workforce in conjunction with our Heritage Information Point
- Develop a broad ranging Marketing Strategy across the site

After three and a half years in Partnership, Rossendale Borough Council, The Whitaker CIC and local people have developed a natural 'Model of Delivery' which works like a series of concentric circles. The collection, people's lives and stories are at the centre, with the Museum and Barn and Stables the host buildings. The Parkland, visitors and user groups are the next layer, with the wider Townships, communities and countryside as the next layer.

In this way the Collection, buildings and people interact and work with each-other.

Rossendale Borough Council

SUMMARY INSTRUCTIONS AND DETAILS OF CONTRACT

ITEM	CONTRACT DETAILS
Contract Description:	<p>Rossendale Borough Council (RBC) is seeking tenders from established audience development and activity practitioners to contribute the smooth and effective delivery of the development phase of the Whitaker Experience (barn and stables project).</p> <p>To oversee the development of an Audience Development Plan as outlined in this document</p> <p>Critical to the document will be the facilitation of and final production of the Activity Plan, working closely with the Whitaker team and partners.</p> <p>The Contractor shall be deemed to have satisfied itself before submitting its tender as to the accuracy and sufficiency of the rates and prices stated in the tender which shall (except in so far as is otherwise provided in the Contract) cover all the Contractor's obligations under the Contract and the Contractor shall be deemed to have obtained for itself all necessary information as to risks and any other circumstances which might reasonably influence or affect the Contractor's tender.</p>
Insurance Requirements:	All adequate insurance to run alongside the contract as required.
Completion of Contract:	Target date of 1 st July 2018
Procuring Officer:	<p>Any queries must be addressed to;</p> <p>Guy Darragh Economic Development Manager Rossendale Borough Council Bacup OL13 0BB Tel:- 01706 252568 email: guydarragh@rossendalebc.gov.uk</p> <p>Before close of tender</p>
Tenders to be sent by email only to:	tenders@rossendalebc.gov.uk (solely use this email for tenders using title- HLF Whitaker Audience Development Activities Plan Tender).
Date/time for Tender return:	Friday 25 th January 2018, 12 noon.

Timetable

This timetable is indicative only. The Council reserves the right to change it at its discretion.

Stage	Date(s)/time
Issue of Invitation to Tender	Tender out w/c 11 th December
Submission of Tenders	Noon, Friday 25 th January
Evaluation of Tenders	31/01/18
Notification of result of evaluation	01/02/18
Interview Date @ Whitaker Museum	7th February 2018
Contract commencement	Estimated mid-February 2018
1 ST Draft produced	30 th May 2018
Review of first draft meeting	Early June 2018
Completion date	1 st July 2018

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CHECKLIST FOR TENDERERS

Failure to provide all of the items in the checklist may cause your Tender to be non-compliant and not considered.

No	Item	Included in Tender?
1.	Fixed price £ as well as full methodology	
2.	Recent References x 2 and CV	

IMPORTANT NOTICE

This Invitation to Tender (“ITT”) is issued to those who wish to tender (“Tenderers”) to Rossendale Borough Council (the “Council”) to undertake (the “Contract”), their professional advisers and other parties essential to preparing a tender for this Contract (the “Tender”) and for no other purpose.

The contents of this ITT and of any other documentation sent to you in respect of this tender process are provided on the basis that they remain the property of the Council and must be treated as confidential. If you are unable or unwilling to comply with this requirement you are required to destroy this ITT and all associated documents immediately and not to retain any electronic or paper copies.

No Tenderer will undertake any publicity activities with any part of the media in relation to the Contract or this ITT process without the prior written agreement of the Council, including agreement on the format and content of any publicity.

This ITT is made available in good faith. No warranty is given as to the accuracy or completeness of the information contained in it and any liability or any inaccuracy or incompleteness is therefore expressly disclaimed by the Council and its advisers.

The Council reserves the right to cancel the tender process at any point. The Council is not liable for any costs resulting from any cancellation of this tender process nor for any other costs incurred by those tendering for this Contract.

You are deemed to understand fully the processes that the Council is required to follow under relevant European and UK legislation, particularly in relation to The Public Contracts Regulations.

1. **BACKGROUND**

1.1 Further details of the Council's needs under the Contract and other relevant information is provided in the Specification at ITT Schedule 1

1.2 If you have any questions or require any clarifications, please contact

Mr Guy Darragh (Economic Development Manager),
Rossendale Borough Council

Tel	01706 252568
Email	Guydarragh@rossendalebc.gov.uk

1.3 Other than the person or persons identified above, no Council employee or member of the Council has the authority to give any information or make any representation (express or implied) in relation to this ITT or any other matter relating to the Contract.

1.4 Please note that the Council's responses to any queries or clarification requests may, at the Council's discretion, be circulated to all Tenderers.

1.5 The Council reserves the right to issue supplementary documentation at any time during the tendering process to clarify any issue or amend any aspect of the ITT. All such further documentation that may be issued shall be deemed to form part of the ITT and shall supplement and/or supersede any part of the ITT to the extent indicated.

1.6 Tenderers must obtain for themselves at their own expense all information necessary for the preparation of their Tenders.

1.7 Under the Contract the Council will require compliance with its policies. Tenderers are advised to satisfy themselves that they understand all of the requirements of the Contract before submitting their Tender.

1.8 The Tender must be received in accordance with the relevant instructions no later than the time and date indicated.

1.9 This phase of the project is expected to be completed within 12 months

1.10 A project plan will be produced by the Project Manager and payment will be made in agreed stages following successful completion of works on an invoice basis. The final 20% of this contract award will be retained until the completion of the second round application to the quality satisfaction of the Economic Development Manager.

1.11 This Audience Development & Activity Plan contract is not expected to exceed the value of £13,000.

1.12 This tender is only for the development phase of the project.

2. TENDER SUBMISSION REQUIREMENTS

- 2.1 Tenders must be written in the English language.
- 2.2 Tenders must provide responses referring back to the numbering format as set out in section 5 of this ITT.
- 2.3 Only one Tender is permitted from each Tenderer. In the event that more than one is submitted by a Tenderer, the one with the latest time of submission will be evaluated and the other(s) disregarded.
- 2.4 The Tender (including price) should remain valid for a minimum period of 90 days.
- 2.5 The Tender must not be qualified in any way.
- 2.6 Any signatures must be made by a person who is authorised to commit the Tenderer to the Contract.
- 2.7 Your full registered business/name and main office address must also be provided on all documents.

3. **CONTRACT DOCUMENTS**

- 3.1 This Council is bound by procurement rules and cannot enter into any negotiations on the Tender or Contract.
- 3.2 Any contract award will be conditional on the Contract being approved in accordance with the Council's internal procedures and the Council being generally able to proceed and may allow for a standstill period to elapse before sending confirmation of contract award to the successful Tenderer.

4. **TENDER EVALUATION AND AWARD CRITERIA**

4.1 The Council does not undertake to accept the lowest or any Tender and reserves the right to accept the whole or any part of any Tender submitted.

4.2 Each Tender will be checked initially for compliance with all requirements of the ITT.

4.3 Tenders will be evaluated against the award criteria set out below.

4.4 During the evaluation period, the Council reserves the right to seek clarification in writing or by means of a clarification meeting from any or all of the Tenderers, to assist it in its consideration of their Tenders.

4.5 The Council may decide to interview Tenderers or hold clarification meetings to assist its tendering process, and Tenderers will be notified in due course.

4.5.1 Tenderers are requested to attend for interview on the 7th February 2018.

Such interviews shall be used to provide clarification and will be taken into account in the evaluation process.

4.5.2 Tenderers will be notified of individual interview times by 1st February 2018.

4.5.3 The award of the tender will be at the sole discretion of Rossendale Council in partnership with the Whitaker Project Board.

4.6 Tenders will be evaluated taking into consideration the following award criteria:

The criteria are:

(a) Value for money (40%)

(b) Fulfilling the requirements of the brief (40%)

(c) Ability to work with other contractors and deliver the project within the timescales (10%)

(d) References from previous projects undertaken (10%)

5. **INFORMATION REQUIRED**

It is not our intention to make the tendering process too onerous on organisations. We would expect Tenders to provide:

5.1 **Tender information**

- 5.1.1 A proposed operational and management structure;
- 5.1.2 Detail of previous experience in managing similar projects for HLF grant submission
- 5.1.3 Approach to working with partnership organisations including the Whitaker management;
- 5.1.4 Areas highlighted through this briefing document in terms of the types of issues that you may encounter during the management period; and
- 5.1.5 Assumed costs you have identified to support your business model.

5.2 **Pricing**

- 5.3 Tenderers must complete a Pricing Schedule that set out all methodology and obligations under the Contract. Clear price for all works must be stated.
- 5.4 All Prices shall be stated in pounds sterling and exclusive of VAT.

6. FREEDOM OF INFORMATION ACT AND ENVIRONMENTAL INFORMATION STATEMENT

- 6.1.1 The Council is subject to The Freedom of Information Act 2000 ("Act") and The Environmental Information Regulations 2004 ("EIR").
- 6.1.2 As part of the Council's obligations under the Act or EIR, it may be required to disclose information concerning the procurement process or the Contract to anyone who makes a reasonable request.
- 6.2 If Tenderers consider that any of the information provided in their Tender is commercially sensitive (meaning it could reasonably cause prejudice to the organisation if disclosed to a third party) then it should be clearly marked as "**Not for disclosure to third parties**" together with valid reasons in support of the information being exempt from disclosure under the Act and the EIR.
- 6.2.1 The Council will endeavour to consult with Tenderers and have regard to comments and any objections before it releases any information to a third party under the Act or the EIR. However the Council shall be entitled to determine in its absolute discretion whether any information is exempt from the Act and/or the EIR, or is to be disclosed in response to a request of information. The Council must make its decision on disclosure in accordance with the provisions of the Act or the EIR and can only withhold information if it is covered by an exemption from disclosure under the Act or the EIR.
- 6.3 The Council will not be held liable for any loss or prejudice caused by the disclosure of information that:
- 6.3.1 Has not been clearly marked as "Not for disclosure to third parties" with supporting reasons (referring to the relevant category of exemption under the Act or EIR where possible); or
- 6.3.2 Does not fall into a category of information that is exempt from disclosure under the Act or EIR (for example, a trade secret or would be likely to prejudice the commercial interests of any person); or
- 6.3.3 In cases where there is no absolute statutory duty to withhold information, then notwithstanding the previous clauses, in circumstances where it is in the public interest to disclose any such information.

Annex 1 - Principal Duties required

The Audience Development and Activity Plan consultant(s) is directly responsible to RBC as the application lead, namely the Economic Development Manager who will be working closely on the project, with support from the Whitaker Project Board.

Audience Development Plan Tasks:

Research and review existing and potential audiences

- Review existing research and consultation
- Establish baseline information about current audiences
- Identify how audiences currently value and engage with Whitaker
- Research potential audiences, reviewing secondary data, policies and plans relating to potential audiences.
- Review and analyse key stakeholders to understand priorities and key opportunities.
- Develop and work with the Whitaker team to plan and deliver consultation and further research to understand audience motivations, needs, interests and barriers to participation.
- Work with the Whitaker team to refine target audiences and audience objectives for the project.
- Write a Consultation Plan suitable for submission with the capital works Planning Application and for the purposes of HLF Audience Development & Activity planning
- Develop recommendations for the project's interpretative approaches and activities based on the audience research and consultation.
- Work with the Business Plan lead to incorporate audience research and consultation re charging, commercial services etc. This is key to the project development and development of the capital works.
- Produce a comprehensive audience development plan which will be of a high standard for submission to HLF in accordance with their guidance notes.

Activity Planning Tasks

Facilitate workshops with the Whitaker team and key stakeholders to support decision making on the activity plan.

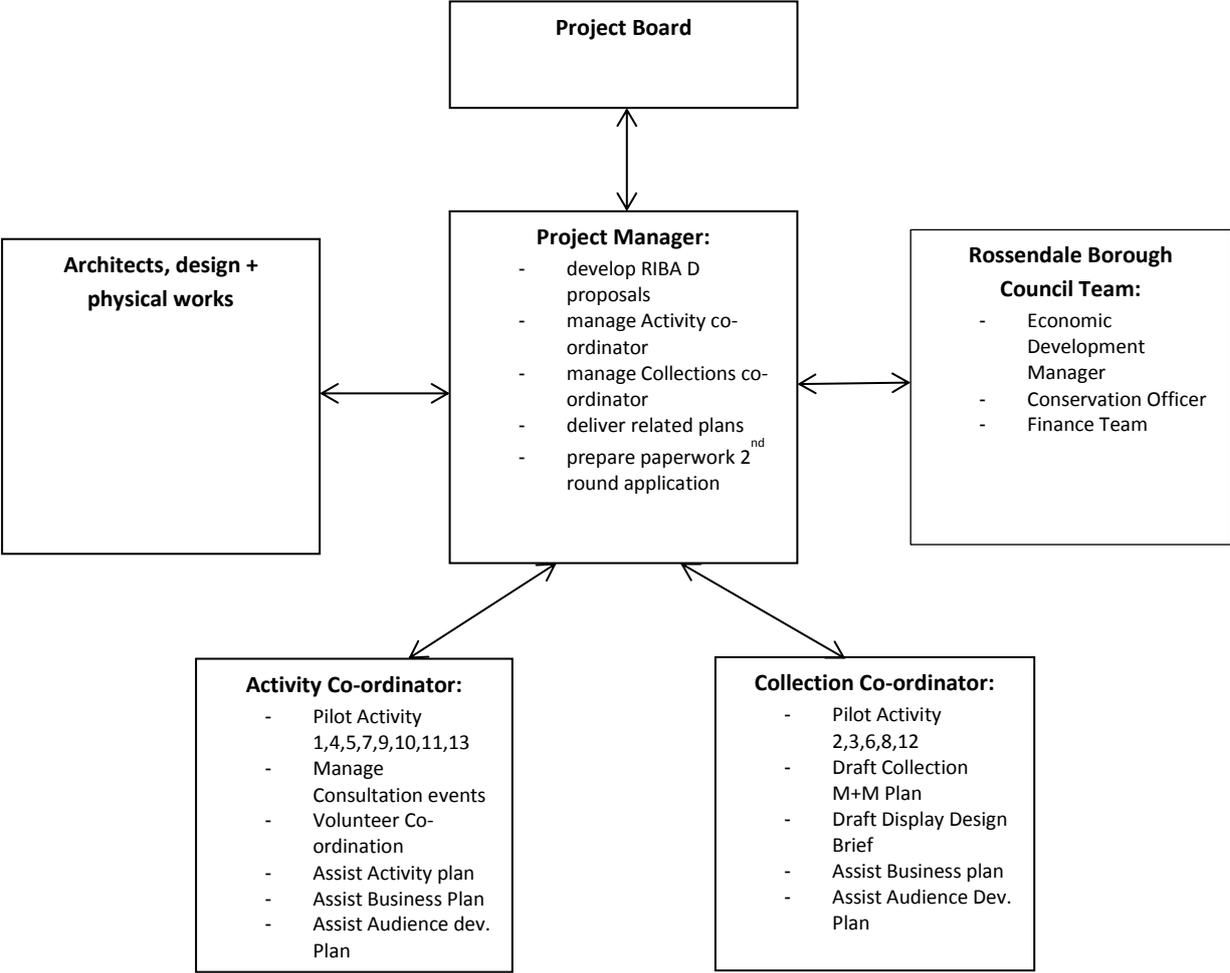
- consultation with a range of stakeholders to gain an idea of operational issues and constraints
- workshops with Whitaker Team to develop vision and aspirations for the future
- comparator analysis for similar projects and case study research
- make recommendations for programming and activities and interpretation
- develop operational plan

- cost both the activity plan and staffing implications
- create action plan
- Produce a comprehensive activity plan which will be of a high standard for submission to HLF in accordance with their guidance notes.

Annex 2 - Requirements

Criteria	Essential	Desirable
Knowledge And Experience	<p>Demonstrable experience of writing comprehensive Audience Development strategies for arts, heritage and/or charitable organisations</p> <p>Demonstrable experience of writing public engagement action plans and in particular HLF “Activity Plans”</p> <p>Solid and extensive experience in developing and implementing systems, frameworks and strategies</p> <p>Experience of analysing data</p>	
Technical And Applied Skills	<p>Proven IT skills (proficient in Microsoft Office, all applications)</p> <p>An ability to build good working relationships</p> <p>Well organised, efficient with careful attention to detail</p> <p>Strong report writing, presentation writing and presentation delivery skills</p> <p>Ability to work our team and harness our expertise and facilitate decision making to ensure ownership of the plan</p> <p>Outstanding communication skills with the ability to articulate a vision, strategy or idea clearly and concisely with a vigorous eye for detail</p>	
Personal Attributes	<p>Ability to offer flexibility in working hours to meet the needs of the project.</p> <p>Must have a determined and can do attitude.</p>	

Annex 3 - Project Structure



Annex 4- Attached tender documents

The Whitaker team and its Partners have a wide range of experience & expertise. It is important that this is fully realised and involvement of key people will be an essential feature of this commission. The following documents have been included to portray some of the development work carried out to date:

1. Activities currently underway as part of the scoping, testing and review of potential ones to carry forward into the delivery and future years
2. Expert panel Partners
3. The Whitaker exhibitions overview
4. Site visits to other commercially run businesses to inform the audience and business planning process September 2017 (e-copy required)
5. Schedule of reports identified for the Stage 2 application
6. Day Architects latest sketch proposals under review
7. The Whitaker Well Being Report Sally Fort 2016
8. HLF Stage 1 Application document (NB appendices only following appointment)