



DIGITAL AWARENESS TRAINING

Organisation	Heritage Lottery Fund
Department	Strategy and Business Development
Title of procurement	Digital Awareness Training
Brief description of supply	Training sessions for HLF staff
Estimated value of tender	£15,000, including VAT and all expenses
Estimated duration	August 2016 – February 2017
Name of HLF Contact	Diane La Rosa
Timetable	Response deadline: Noon, Friday, 5 August 2016 Clarification interviews, if necessary: w/c 8 August 2016 Confirmation of contract: w/c 15 August 2016 Completion of contract: 31 March 2017

1 Overview

- 1.1 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). From April 2013 we will be operating under our new Strategic Framework: 'A lasting difference for heritage and people'. See the [HLF website](#) for more details.
- 1.2 HLF 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.
- 1.3 The Heritage Lottery Fund requires a training programme for staff (and possibly some of our decision-takers – trustees and board-members – as a secondary audience), to build knowledge and confidence around the different ways that heritage projects can incorporate digital technology.
- 1.4 The purpose of this training is to enable HLF staff to understand and communicate key principles of effective digital outputs. This will support them in their roles of: advising on the development of projects; assessing grant proposals; and supporting and monitoring successful delivery of projects in receipt of funding.
- 1.5 The training should also enable staff to confidently communicate HLF's Terms of Grant for projects that include digital outputs including issues of accessibility, formats, licensing and intellectual property, and acknowledgement for HLF as a funder and to make informed judgements about where there may be grounds for flexibility.

2 Required impacts

- 2.1 We aim for a number of impacts to be delivered through this commission. These include:
- 2.2 Improving HLF staff understanding of best practice and digital issues, and the impact of both best and poor practice on projects, audiences and organisations.
- 2.3 Improving HLF staff's knowledge of and confidence in promoting, advising on and monitoring HLF's Terms of Grant for digital outputs.
- 2.4 Equipping staff with the knowledge required to offer clarity and good customer service to organisations submitting enquiries and applications, and delivering projects, with a digital element.
- 2.5 Assisting the creation of a peer-to-peer network of digital expertise and support amongst HLF staff.

3 Summary of context

- 3.1 We encourage the use of digital technology in any way that is appropriate to a project achieving our outcomes and meeting any specific requirements of the programme to which the applicant is applying. We use the term 'digital output' to cover anything created in a project in a digital format which is designed to give access to heritage and/or to help people engage with and learn about heritage; for example a collection

of digital images or sound files, a web site with heritage resources, or a smartphone app. At least one 'digital output' is created in the vast majority of HLF projects.

- 3.2 In July 2012 we made significant changes to our approach to funding digital activity. Firstly, we introduced a change of policy to allow standalone digital projects to be funded.
- 3.3 Secondly, we introduced new Terms of Grant for digital outputs. These impose compliance requirements such as the use of a Creative Commons licence. The details are available in both the application guidance for each of our funding programmes (e.g. p.31/Appendix 4 of the Our Heritage application guidance – see link); as well as the standard Terms of Grant for each programme. Examples of each such document can be found here on the [HLF website](#).
- 3.4 [Digital guidance was published](#) which sets expectations for grantee digital outputs, for example meeting W3C accessibility standards and using open technologies where possible.
- 3.5 In 2015 we undertook research into the types of digital outputs being produced in HLF-supported projects.
- 3.6 The types of digital output that were identified by the research were:
- Web site with heritage assets
 - Creating new film/video
 - Creating new images
 - Documents/archives being digitised
 - School resources
 - Creating new sound recordings
 - New documentation and data sets
 - On-site digital experiences
 - Film/video being digitised
 - Sound recordings being digitised
 - Mobile applications, games or augmented reality.
- 3.7 The study indicated that few projects were wholly digital, with digital outputs tending to be created as part of wider project activity. It identified low overall awareness of our guidance amongst grantees, and challenges related to compliance with Terms of Grant, for instance around Creative Commons licensing and funder acknowledgement. The findings correspond to the experiences of our staff.
- 3.8 We want to increase the quality of heritage digital outputs and projects. A key first step to making the progress that we wish to see comes in building the knowledge and confidence of HLF staff to support the development, assessment and monitoring of the delivery of digital projects.

4 Content themes to consider

- 4.1 It is important for us to raise the knowledge and confidence of staff/decision-takers to a consistent level – both in terms of understanding core principles about quality of digital outputs and our Terms of Grant.
- 4.2 Often, proposals we receive include digital outputs without clearly indicating how this will help them to meet their strategic priorities. Our intention is to encourage

applicants to consider what they are seeking to achieve, and how digital work will assist this. Equally, we'd like to enable our staff and grantees to understand that digital work is not a separate strand of activity, but something that can and should be integrated with core aims and activities.

- 4.3 Points for consideration in the training include:
- What good quality digital outputs of the kind HLF projects produce look like
 - Technical issues staff are likely to encounter in applications/projects creating digital outputs, such as standards, compatibility, obsolescence;
 - The life-cycle of digital outputs from initiation and production to long-term sustainability;
 - Indicative costs of digital outputs throughout the life cycle;
 - How digital outputs of heritage projects can be made available and shared effectively with existing and new audiences;
 - Licensing and metadata;
 - Analytics; and evaluation of digital outputs;
 - 'Myth-busting' and challenging existing preconceptions of digital;
 - Signposting to relevant guidance and materials suitable for staff and applicants/grantees.
- 4.4 This is not an exhaustive list, and we welcome the insight of providers for other themes.

5 Outputs

- 5.1 The following outputs will be required:
- 1 x pilot session for 15 people in London
 - 6 x sessions for approximately 15-18 people in a range of locations around the UK (see 6.2, below)
 - Training materials/workbook
 - Short written report, on any outstanding issues and next steps.
- 5.2 We anticipate 5-6 hours of workshop activity for each training day.
- 5.3 The training should take consideration of the accessibility requirements of our staff.
- 5.4 Written materials should adhere to HLF's accessibility and formatting guidance (appended).
- 5.5 Written reports will be confidential to HLF. The contents and structure of any report are to be agreed in advance of writing. All reports should be to be supplied in both hard copy and electronic format.
- 5.6 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](#)).

6 Format of the training

- 6.1 We envisage one pilot workshop, which – if successful – will be followed by a further six sessions. The pilot is intended to test, refine and approve the format and training materials for wider roll-out.

- 6.2 These sessions will need to take place across the country, to enable staff across our 11 offices in England, Scotland, Wales and Northern Ireland to attend. We envisage 2 sessions in London; 2 in the North of England; 1 in Bristol; and 1 in Scotland, subject to confirmation.
- 6.3 We anticipate the following timescale for delivery of the training (subject to confirmation) – pilot training in October 2016; wider roll-out November 2016-February 2017.
- 6.4 We will consult with the successful applicant for this work to book appropriate venues (including Wi-Fi as a requirement). The costs of booking fees, catering and basic AV, will be met by HLF, and should not be included in your proposed budget in responding to this brief.
- 6.5 Your proposal should outline the training techniques that will be applied (e.g. hands on/participative, group work etc.), and the different ways that learning will be underpinned and reinforced before, during and after each session.
- 6.6 We also encourage suggestions about ways that equipment beyond basic AV might be incorporated, including potential for demonstrations of real digital projects for training participants. If you are able to provide additional equipment towards this (e.g. tablets, Arduino, etc) please indicate this in your proposal. The costs associated with any additional equipment should be included in your proposed budget in responding to this brief.

7 Management

- 7.1 The commission will begin in the w/c 15 August 2016 and be completed by 31 March 2017.
- 7.2 Bids which exceed £15,000 inclusive of VAT and all expenses will be excluded from this procurement exercise as being unaffordable. Value for money is a key element of the evaluation criteria.
- 7.3 The payment schedule will be as follows:
- 20% on signing of contract
 - 10% on delivery of pilot session
 - 60% on delivery of remaining sessions
 - 10% on submission of final report (including amendments).
- 7.4 The contract will be subject to an effectiveness review after delivery of the pilot session; notwithstanding the Fund shall have the general right to terminate the contract on the provision of 7 days' notice. Decisions about any such break would be determined by careful consideration of how successfully the pilot delivers the required impacts of this brief.
- 7.5 The contract will be based on the HLF standard terms and conditions.
- 7.6 The research will be managed on a day-to-day basis for HLF by John McMahon (Policy Adviser, Learning & Volunteering).

8 Award Criteria

- 8.1 A proposal for undertaking the work should include:

- a detailed methodology on how the training will be delivered and learning outcomes achieved;
- strong evidence of your team's relevant skills and experience to successfully deliver this brief, including examples of similar training undertaken previously;
- demonstration of a clear understanding of HLF's context and policies, and of digital delivery in the wider heritage sector;
- details of staff allocated to the project, together with experience of the contractor and staff members in delivering relevant training. 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 schedule for carrying out the project;
- an overall cost for the work;
- notification of other on-going work related to HLF projects, and/or other potential conflicts of interest.

8.2 Your Bid will be scored out of 100%.

70% of the marks will be allocated to your response to the Quality Questions below. Each question will be scored using the methodology in the table below.

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 training brief? Weighting-10%
2. To what extent is the methodology appropriate to the requirements set out in this brief? Weighting-30%
3. What is the extent of the experience of delivering relevant training, of digital outputs, and of HLF's work? Weighting-15%
4. How well has the tenderer structured a team in order to successfully manage the contract and deliver the required work to the budget and timetable required by HLF? 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 HLF 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

Score	Word descriptor	Description
		good standard of evidence. Gives the HLF confidence in the ability of the Bidder to deliver the contract. Meets the HLF's requirements.
4	Very good	Response is comprehensive and supported by a high standard of evidence. Gives the HLF a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the HLF's requirements in some respects.
5	Excellent	Response is very comprehensive and supported by a very high standard of evidence. Gives the HLF a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the HLF's requirements in most respects.

30% of marks will be awarded for Price.

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%

- 30 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% (full marks) for price and the second placed bidder gets 27.6% and so on. ($8/100 \times 30 = 2.4$ marks; $30 - 2.4 = 27.6$ 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/Heritage Lottery 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 your proposal 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 submission.

TABLE A: (firm and fixed costs)

Cost	Post 1 @cost per day (No of days) e.g. Trainer 1 @ £400	Post 2 @cost per day (No of days) e.g. Trainer 2 @ £300	Post 3 @cost per day (No of days) e.g. Training admin @ £175	Other costs	Total days	Total fees
Inception meeting to agree plans and finalize requirements with the Fund	e.g. 0.5	1	1.5		3	850
Equipment hire						
Travel						
[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)

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.

9 Procurement Process

- 9.1 HLF reserves the right to reject abnormally low tenders. HLF reserves the right not to appoint, and to achieve the outcomes of the research through other methods.
- 9.2 The procurement timetable will be:
- 9.3 Tender return deadline:
Completed proposal to be returned to HLF by Noon, Friday 5 August 2016.
Clarification meetings may be held during the evaluation process which will take place around the week commencing 8 August 2016.
HLF will notify bidders of our procurement decision in week commencing 15 August 2016.
- 9.4 We do not expect applications to exceed 15 pages approximately, including appendices.
- 9.5 Your tender proposals must be sent electronically via e-mail before the tender return deadline of **Noon, Friday 5 August 2016** to the following contact:
Diane La Rosa

Heritage Lottery Fund
Holbein Place
London
SW1W 8NL
020 7591 6024
Diane.La.Rosa@hlf.org.uk

- 9.6 Please visit the [HLF website](#) for further information about our organisation.

Appendix 1: Accessibility and formatting guidance

Reports and other documents created for HLF 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](#).

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.