NHMF CONTRACT NUMBER 299

Mentoring support for developing heritage projects based in Northern Ireland

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| **Organisation** | **National Heritage Memorial Fund (“Heritage Fund”)** |
| **Department** | Business Delivery |
| **Title of procurement** | **Engagement advice and support for organisations based in Northern Ireland developing applications to the Heritage Fund.** |
| **Brief description of supply** | **To provide practical and useful support and guidance to organisations developing heritage projects that are likely to apply to the Heritage Fund in Northern Ireland.** **Specifically to supply support and guidance around engaging with different groups and communities across Northern Ireland to help organisations who are applying to the Heritage Fund to meet the Fund’s mandatory funding outcome i.e. a wider range of people will be involved in heritage.** |
| **Estimated value of tender** | Up to £35,000 (inclusive of VAT) |
| **Estimated duration** | Up to 31st of March 2024  |
| **Name of Heritage Fund Contact(**s) | **Margaret Henry, Head of Engagement in Northern Ireland:** ROSStenderNI@heritagefund.org.uk  |
| **Timetable** | Response deadline: November 1st at 11amE-mail clarification questions to ROSStenderNI@heritagefund.org.uk by: 17th October 2021 Clarification answers posted by: 24th October 2021 Clarifications/interviews if needed: w/c 29 November 2021Confirmation of contract: w/c 20 Dec 2021Commencement of contract: 1 February 2022Completion of contract: 31 March 2024 |

**1. Introduction**

The National Lottery Heritage Fund (Heritage Fund), formerly 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).

**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: [Strategic Funding Framework (2019 - 2024)](https://hfund365.sharepoint.com/sites/BusinessDelivery/Shared%20Documents/Central/ROSS/08_Ross/Northern%20Ireland%20ROSS%20tender%20-%202021/4c150539-6f12-466c-aa01-68b439db22ad.docx)

In order to ensure Heritage Fund potential applicants and grantees receive access to the requisite mentoring support, we intend to procure a small group of specialists, entitled “ROSS Consultants”. ROSS Consultants will have knowledge of local Northern Ireland heritage issues and public engagement to support organisations developing heritage projects **that are likely to apply to the Heritage Fund in Northern Ireland.** Full requirements are contained in this ITT document.

ROSS Consultants will most likely be deployed during the pre-application and Expression of Interest (EOI) stage of the grants lifecycle. This is outlined below but full induction of the grant lifecycle will take place for successful bidders. Fund staff will assess at which point(s) in the grant lifecycle the ROSS Consultant support is most appropriate and brief the ROSS Consultant appropriately.

**Pre-application phase:** During the pre-application phase organisations will need help to understand what the Fund’s outcomes mean and how they can deliver them within the project they hope to apply for. Specifically they need to understand that all applications must fulfil the mandatory outcome i.e. a wider range of people will be involved in heritage.

Many organisations, especially smaller often voluntary-led ones may not understand what this means for their project and how they can go about engaging with under-served communities in a meaningful way to help shape the project idea, plan and delivery.

ROSS Consultants will work with organisations to constructively challenge how they are engaging with communities in an appropriate way. How that engagement should influence their project and how engagement is kept at the core of their project . This support will be at the very early stage of project development and could result in an organisations submitting an application (for grants £3,000- £250,000), a Project Enquiry Form (see below) or an Expression of Interest Form (see below).

**Project Enquiry Forms Phase:** (PEF). Applicants applying to the small and medium grants programmes (£3,000-£250,000) are encouraged to submit a PEF before their application. While this is not a mandatory part of the process, the PEFs are used by Fund staff to respond to queries and offer appropriate support at this pre-application stage. ROSS Consultants can provide support in getting information ready for a PEF but it is more likely that the PEFs will be used to assess which potential projects would benefit from ROSS Consultant support and what that support could look like.

**Expression Of Interest Phase (EOI)**: When applicants are considering making an application for £250,000-£5 million an EOI is the first formal part of the application process. ROSS Consultants could be asked to provide support to get a project to EOI stage.

**Successful EOI moving to full application phase:** ROSS Consultants could be asked to provide support if an EOI is successful, to help the applicant proceed to full application by supporting in specific areas of public engagement that have been identified as needing development.

ROSS Consultants will work with applicants at the appropriate point in the grant lifecycle to ensure that community engagement has been put at the core of the project and that costs and resources to meet engagement needs have been thought through at this stage and properly outlined in the EOI. This will all be agreed with Fund staff and detailed in a brief.

**Roles**

The ROSS Consultants role on any individual case will be defined at the time of commissioning and will involve one or more of the following functions

1. **Supporting and guiding projects:**
* Facilitating grantees and potential applicants to identify and remove blockages to the application, development and/or delivery of their project
* Using specialist knowledge and experience to support grantees and potential applicants to help develop and deliver their project’s vision
* Supporting grantees and potential applicants to undertake learning and development opportunities relevant to their project’s objectives
* Evaluating projects and their impact on people, communities and heritage
1. **Providing Expert Advice:**
* Supporting the Heritage Fund’s decision making process by commenting on aspects of a project application relevant to the ROSS Consultant’s area of expertise. This will only occur with projects where the ROSS Consultant has had no previous input.

Although the focus of the tendering exercise is to focus on the pre-application, PEF and EOI stages, ROSS Consultants may also be deployed during the development, delivery, assessment and post-completion phases of the grants lifecycle. Commissions will always be discussed and agreed with ROSS Consultants in advance.

We may also, from time-to-time, wish to commission ROSS Consultants to undertake broader work related to the key technical expertise areas of this agreement, such as training and upskilling of our staff and applicants/grantees on public engagement matters.

**3. Tender scope**

ROSS Consultants must demonstrate experience of the challenges and opportunities around heritage engagement within Northern Ireland and how that impacts on organisations aiming to bring heritage to a wider range of people especially those currently under served groups. ROSS Consultants may have relevant qualifications and/or membership of relevant professional bodies.

We are seeking to put in place approximately 4 contracts with individuals/organisations who can work across Northern Ireland (only) and have experience of working in the following technical areas:

* **Technical Area 1 – Audience Development and Widening Access**

We are seeking experts in current practice of inclusion, access and audience development in relevant settings. We view access and inclusion in its widest possible sense across a range of demographics and characteristics. Audience development is the ethos and practice of building relationships with your visitors, customers and participants through understanding their needs and shaping your delivery to meet those needs. It is important to demonstrate experience of using digital outputs as relevant, to deliver access, inclusion and audience development.

* **Technical Area 2 - Monitoring and outcomes-based evaluation**

To demonstrate that projects can deliver the mandatory outcome and any other outcomes identified, all applicants must consider some form of monitoring and evaluation. This will be proportionate to the project and the level of grant requested. We are seeking experts who can support applicants to think through their approach to evaluation at the planning stage, consider costs, the use of external evaluation support when relevant and how practically evaluation can be carried out across the life of the project. It is important to demonstrate experience of using digital outputs as relevant, to deliver monitoring and evaluation.

* **Technical Area 3 - Volunteer recruitment and management**

Volunteering is often used within projects as a way to engage different people in heritage. We are seeking experts in recruiting and retaining volunteers and volunteer management. Understanding the requirements and costs of recruiting and managing volunteers at pre-application and/or EOI stage is essential.

* **Technical Area 3 - Research, data and insight**

Research, data and insight can be invaluable in helping applicants shape their project to meet the needs of underserved groups in their locality and what changes they can realistically deliver through their project. We are seeking experts who can guide organisations in how to use research from a range of sources including primary research and internal data to bring insights to their project and shape project delivery and outcomes.

If relevant please demonstrate experience of using digital in each of the technical areas. However, please note that the focus of this tender is public engagement work, Heritage Fund are running a separate UK wide tendering exercise for digital expertise. If you are interested in the Digital tender this will be made available on Contracts Finder at the start of October. For more information please contact: rossprocurementexternal@heritagefund.org.uk

In many cases we will be asking you to work with organisations or cohorts of organisations with limited capacity and that may be entirely run by volunteers. Giving advice and guidance that is proportional and achievable will be a key part of this work.

**We are seeking to recruit experts in all four of the areas of public engagement but you do not need to be an expert in all four to apply.** In your application you will need to describe the difference you have made in ***at least two*** of these areas and demonstrate that you have experience of working in more than one type of heritage, that is: historic environment; natural heritage; industrial, transport or maritime heritage; museums, libraries and archives; and intangible heritage or community heritage.

If you are seeking to be considered for audience development expertise you must demonstrate competence in delivering effective digital outputs.  We use the term digital output to cover anything we fund in a digital format which is designed to give access to heritage or to help people engage with heritage e.g. a web site, a set of digital images, an online survey an online exhibition or a smartphone app.

We have identified that core skills in public engagement must include understanding and knowledge of equality legislation and you are asked how your knowledge of equality legislation informs your expertise in public engagement. You should have significant experience of delivering high quality public engagement work with a range of under-served audiences and the mentoring skills to encourage the people involved in developing projects to deliver excellent outcomes for the proposed beneficiaries. We ask you to demonstrate your public engagement skills through examples of a range of heritage contexts.

An induction process for appointed ROSS Consultants will be held to further explain the detailed requirements of the EOI and application process and the full grant life-cycle..

# 4. Contract management

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

We estimate the total value of this tender for the contract period (February 2022 – March 2024 inclusive) shall not exceed £35,000 including VAT. The contract will be let by the National Heritage Memorial Fund.

We intend to create up-to approximately four separate contracts with organisations/ partnerships/ sole-traders etc. Each contract may have up to three named individuals, therefore if you are bidding as an organisation/partnership etc you may put forward up to three separate tender responses. We expect the maximum value of an individual contract not to exceed £15,000 (including VAT) for the duration of the contract term. We make no guarantees to provide any work to the suppliers selected.

For clarity, if you are applying as an individual then you apply in your own name and you will be the ROSS Consultant if appointed. If an organisation is applying you must identify a specific member of staff and if you wish to apply for more than 1 member of staff then a separate Evaluation Questions must be completed for each member of staff.

If a named individual, who has been included in the Framework, leaves the employment of the bidder during the term of the Framework, the Heritage Fund may, at its sole discretion, permit the bidder 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 Funds standard Terms and Conditions uploaded to the tendering portal.

In undertaking any work, appointed ROSS consultants will need to abide by the Heritage Fund’s relevant policies, including but not limited to our Equality & Diversity policy, Health & 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 the Heritage Fund policies will be provided to successful bidders.

**Ordering process**

In awarding any Commission /placing orders to a Contractor, the Fund shall consider the nature and scope of the Services it requires to be carried out and completed, the complexity of those Services and the relevant experience of the contracted individuals as set out in the tender documents submitted by the Contractor and Commissions shall be awarded on this basis.

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

# 5. Evaluation scoring

The purpose of the Questionnaire and Evaluation Criteria is for the Bidder to provide sufficient information for the Heritage Fund to decide whether the individuals proposed have demonstrated the skills, knowledge and experience required at a reasonable cost to be included on the contract.

You may respond as an individual or as an organisation. Organisations may only put forward **up to three** named individuals. Each individual must complete the Evaluation Questions. **You will therefore need to return the Tender Evaluation Questions section for each individual applying.** The Heritage Fund reserves the right to select which individuals will be contracted with from a winning bid. Individuals will not be eligible to take up commissions until they have participated in an induction session (which may be in person or virtually).

The detailed criteria require examples taken from your professional and/or personal experience. The word limit for each is specified.

Please note that we will disregard any text that exceeds our required word limits.

We will also require *successful* bidders to send in an up-to-date CV/bio detailing their experience and previous work and will require all successful bidders to take part in our internal ROSS Consultant database (“ROSS Zone”) that will enable our staff to view and select an appropriate ROSS Consultant for their project. We do not require a CV as part of this application.

**Tender submission documents**

The tender is split into 4 Technical Areas. For each Technical Area that Bidders are interested in applying for, they should complete the following in the Evaluation Questions section of the tender submission document:

**Section 2** – to confirm the Technical Areas that they are bidding for

**Section 3** – to provide examples of their experience for each of the Areas ticked in Section 2.

Please note, bidders must apply for at least 2 Technical Areas.

Tenderers must return the following documentation:

* Completed tender submission document

**Weightings**

Your Bid will be scored out of 100.

**70 marks will be awarded to Quality and 30 to Price**

Your tender will be scored based on your responses to the quality and pricing tender questions, included in the attached tender questions document.

**Qualitative scoring section**

Each of the scored sections 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 45** in the quality section to proceed to having their Price score considered.

|  |  |
| --- | --- |
| **Quality sub headings** | **Weighting** |
| 1.1) Professional development | 20 |
| 1.2) Social value and environmental sustainability  | 10 |
| 1.3) Project Management Experience | 10 |
| 2.1) Technical expertise\*  | 30 |

\**Bidders are to complete only the Technical Areas that they are interested in being appointed to. 30 marks will be awarded to each technical expertise question, scores for technical expertise will be scored independently and will not be cumulative. See scoring worked example below.*

The top scoring bidders will be shortlisted for the contract until the maximum estimated number of bidders to be shortlisted for the contract is reached, ensuring there is a minimum of one bidder appointed to each Technical Expertise Area.

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

**Scoring methodology for quality questions**

This table shows the approach to marking the quality evaluation criteria that will be used for all questions except costs:

|  |  |  |
| --- | --- | --- |
| 0 | Poor | No response or partial response and poor evidence provided in support of it. Does not give the 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 | Response is comprehensive and supported by good standard of evidence. Gives the Fund confidence in the ability of the Bidder to deliver the contract. Meets the Fund’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the Fund a high level of confidence in the ability of the Bidder to deliver the contract. Exceeds the Fund’s requirements in some respects.  |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the Fund a very high level of confidence the ability of the Bidder to deliver the contract. Exceeds the 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 rate you provide. Price will only be considered for bidders who score a minimum of 45 in the quality criteria.

## Price Criterion at 30%

30 marks will be awarded to the lowest daily rate and the remaining bidders will be allocated scores based on their deviation from this figure. Your daily rate 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.

Please complete the attached **tender submission document** providing your daily rate 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.

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

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.

**Scoring worked example**

**Bidder A** completes the responses for Technical Expertise areas 1, 3 and 4. Bidder A scores a total of 24 out of 40 on questions 1.1 – 1.3. Bidder A then scores:

* 20 on Technical Expertise Area 1
* 24 on Technical Expertise Area 3
* 30 on Technical Expertise Area 4

The total score for questions 1.1 - 1.3 is then added to each competency area. Bidder A has therefore scored a total of:

* 44 on Technical Expertise Area 1
* 48 on Technical Expertise Area 3
* 54 on Technical Expertise Area 4

Bidder A is eliminated from Technical Expertise Area 1 as they did not reach the minimum score of 45. Bidder As pricing is considered for Technical Expertise Areas 3 and 4.

**Notes:**

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

**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 services.**

**6. Procurement Process**

The 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 Fund’s and Bidder’s resources are used appropriately, we will only invite up to six (the ultimate number will depend on the closeness of the scores) highest scoring bidders to attend a clarification 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: November 1st at 11am
* E-mail clarification questions to ROSStenderNI@heritagefund.org.uk by: 17th October 2021
* Clarification answers posted by: 24th October 2021
* Clarifications/interviews if needed: w/c 29 November 2021
* Confirmation of contract: w/c 20 Dec 2021
* Commencement of contract: 1 February 2022
* Completion of contract: 31 March 2024

Your tender proposals must be sent electronically via e-mail before the tender return deadline of **November 1st at 11am** to the following contact:

Margaret Henry, Head of Engagement NI

National Heritage Memorial Fund

Email: ROSStenderNI@heritagefund.org.uk

 [www.heritagefund.org.uk](http://www.heritagefund.org.uk)

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

**Appendix: Accessibility and formatting guidance**

The 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 a 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 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**

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**

Responses 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 i.e. 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 (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’.

**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 tender to THE FUND**

Please submit your document as a Word file.

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