



**Dacorum**  
Heritage



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Request for Proposal (RFP)  
Dacorum Heritage 30:30  
Supplier Instructions

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This document is strictly confidential and **not** for general circulation.

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# 1 Dacorum Heritage 30:30 Request for Proposal (RFP)

This RFP is designed to provide us with the information required to assess your organisation's suitability to be a supplier to The Dacorum Heritage Trust Limited (DHT) for the provision of consultancy services.

The word organisation refers to a sole trader, partnership, incorporated company or other business entity in the UK; or a similar entity operating outside the UK, as appropriate.

This RFP must be fully completed in English, stating 'nil' or 'not applicable' rather than leaving blanks. All information supplied must be accurate and up to date. DHT reserves the right to refuse to consider your response if the supplier questionnaire in this document or any of the questions in the attached appendices are not fully completed or are found to be inaccurate.

Information or documents submitted in response to this RFP must relate to the organisation that will enter into a formal agreement with DHT.

Where any question refers to relevant UK legislation, non-UK organisations may answer on the basis of applicable laws in their own country but should provide a reference for EU or UK equivalency.

All responses and submissions provided may form part of any subsequently awarded contract.

Note – DHT will not be liable for any costs or expenses incurred by suppliers in completing this RFP.

Any additional information required by a supplier should be requested from the point of contact in section 7 [Contact Details](#) by email in accordance with the timetable in section 6 [Timescales](#). In the interest of fairness, DHT reserves the right to share such requests and responses with competing suppliers (the source of any questions will not be disclosed).

Proposals may not be considered if complete information is not given in the Proposal or if the particulars asked for in the schedule are not fully filled in.

The RFP response (including relevant appendices) must be completed and submitted no later than **12<sup>th</sup> January 2024**. DHT reserves the right to reject any response that fails to meet this deadline.

## 2 Company Overview

Dacorum Heritage is unlike any other museum, as it currently operates from a museum store. There is no dedicated open gallery space, so staff and volunteers must think creatively when engaging local communities with local history.

In its 30th anniversary year, Dacorum Heritage (DH) has reached a critical point in its existence. It has outgrown its original, temporary Museum Store (a converted former Victorian fire station behind the Civic Centre in Berkhamsted, Hertfordshire) and can no longer accept new accessions to its own collection or those of local groups and organisations in the Borough of Dacorum for which it is currently storing and caring for over 130,000 items. The building is too small for the size of collections, has significant environmental challenges, and is inaccessible to visitors. This position is not sustainable and a fundamental strategic review to make DH fit for purpose for the next 30 years is essential.

The Borough Council has offered to consider DH's future physical infrastructure needs in its next Budget. As a result, the Board of Trustees of DH are looking to better understand the potential for the collection, through the eyes of stakeholders and those not currently engaging with the collection. A similar project looking at the collection's needs will also take place.

This project is vital for DH to develop a proposal for consideration by the Council in March 2024 to ensure that the heritage collections and their potential for engaging and inspiring communities in Dacorum and beyond is not lost for future generations.

### 3 Confidentiality

All information contained in this RFP is confidential and may not be passed on to any third party other than what is strictly necessary for the purposes of submitting your Proposal. You must also ensure that a similar obligation of confidentiality is placed upon any third party to whom you may need to disclose any of this documentation for the purposes of the RFP. Likewise, all information provided by suppliers in their Proposals, will be treated in confidence by DHT.

Suppliers must undertake not to make any reference to DHT in any literature, promotional material, brochures, or sales presentations, nor make use of any DHT logo, trademark or other proprietary identifying symbol without the prior written consent of DHT.

### 4 RFP Principles

If it is found at any point when considering this RFP that circumstances prevent you from responding to it, please contact DHT as soon as possible to enable us to evaluate the effects of such a withdrawal upon the selection process.

DHT reserves the right to accept in part or entirety any proposals submitted.

### 5 Purchase to Pay Requirements

Should DHT choose to enter into a contract with your organisation, you will be required to:

- ensure purchase order numbers are quoted on **all** invoices you send to DHT.
- only provide goods or services upon receipt of a Purchase Order from us which specifies our requirement.

### 6 Timescales

Indicative project timescales will be to start 29<sup>th</sup> January 2024 and complete by 1<sup>st</sup> March 2024. The phasing of this approach will be agreed with the successful suppliers and DHT reserve the right to flex the timescales as appropriate.

#### 6.1 Key Dates and Activities

Key activities and target dates for the RFP process are set forth below. DHT may change these dates at its sole discretion and convenience, without liability.

Please note that suppliers must plan to have their resources available during the dates shown above. If the dates change for any reason, a revised schedule will be communicated as applicable.

Activity	Dates
Release of the RFP	18 <sup>th</sup> December 2023
Supplier intent on responding to the RFP	22 <sup>nd</sup> December 2023
Last date for questions on RFP	5 <sup>th</sup> January 2024
DHT response to questions	8 <sup>th</sup> January 2024
Supplier to submit its RFP response	12 <sup>th</sup> January 2024
Confirmation of DHT decision	26 <sup>th</sup> January 2024

## 7 Contact Details

Any general queries on this RFP should be sent to the Trustees: **Please contact**  
**Dacorum3030@dacorumheritage.org.uk**

**Tenderer Information to be completed.**

### 7.1 Contact Details:

1. Name:
2. Position within organisation:
3. Address:
4. Telephone:
5. Mobile Phone:
6. E-mail:

### 7.2 Other Information

7. Is the applicant in administration or subject to bankruptcy proceedings at the present time, or are the directors/principals aware that this is likely to be the case?

YES  
NO

8. If yes, please give details: (Maximum 150 words)

9. Has the organisation or any directors, partners, associates, or the company secretary been convicted of a criminal offence relating to the conduct of their business or professions, or committed an act of grave misconduct during their business or profession?

YES  
NO

10. If yes please give details:(Maximum 150 words)

11. Has your organisation ever failed to meet its obligations to pay taxes or social security contributions in the United Kingdom or other EU member state?

YES  
NO

12. If yes please give details:(Maximum 150 words)

13. Is your organisation a member of a group of companies?

YES  
NO

14. If YES give the names and company numbers of the ultimate holding company and associated companies, clearly stating the relationship with your organisation in the questions below:

Company Name:

Company Number:

Relationship:

What is your organisation's VAT number:

Number of employees:

### 7.3 Financial Information

15. Please detail your company turnover and net profit for the last three full year accounts:

	Turnover	Net Profit
Last Financial Year		
Previous Year		
Year Before		

You may be required to provide your most recent three years' full audited accounts if appropriate (or for the period of your incorporation or trading if less than 3 years) (Modified balance sheets, without trading account summaries and details of turnover are not acceptable). Please only provide these if requested by an officer of DHT. This requirement shall be determined by your perceived level of criticality to our supply base. Electronic versions of accounts are acceptable, if required.

16. Please confirm that you will provide these if requested by an officer of DHT.

YES  
NO

17. Please confirm that you agree to provide a banker's reference if requested.

YES  
NO

## 8 Insurance

18. DHT require confirmation that if awarded a contract your organisation will provide a minimum level of insurance. A copy of the policy summary for each insurance policy and evidence that the premium has been paid must be provided before a contract can be awarded.

19. Public Indemnity: Please state maximum level of insurance held.

20. Employers Indemnity: Please state maximum level of insurance held.

21. Professional Indemnity (If applicable): Please state maximum level of insurance held.

22. Have any claims in excess of £50,000 been made under your organisation's Employers, Product, Public or Professional indemnity policy within the last three years?

YES

NO

If yes please give details;

23. Has your organisation had any default notices issued against it or any incurred any liquidated damages or penalties during the last 3 years in respect of comparable services.

YES

NO

24. Has your organisation had a contract that was not renewed for failure to perform to the terms of that contract.

YES

NO

25. Has your organisation been censured or fined by a governing body for failure to comply with their rules / legislation?

YES

NO

26. If you have answered YES to any of the four questions above, please provide details. (Maximum 150 words)

27. Do you propose to sub-contract or franchise any part of the delivery of the goods, works or services to be provided to DHT?

YES

NO

May be considered, subject to contract.

28. If yes, please give details.

## 9 Corporate Social Responsibilities

29. Do you have a policy for your corporate social responsibility?

YES  
NO

## 10 Anti-Bribery & Corruption and Gifts & Hospitality

30. Does your organisation have an Anti-bribery & Corruption Policy? If yes, please attach

YES  
NO

31. Does your organisation have any other Anti-Bribery procedures?

YES  
NO

32. If yes to either of the two questions above how are these communicated to employees and enforced? (Maximum 150 words)

33. Does your organisation have a Gifts & Hospitality Policy? If yes, please attach.

YES  
NO

34. Please give details of up to 3 clients to which you have provided comparable services to a similar organisation to DH.

## 11 RFP Responses

The table below contains a summary of the documents comprising this Request for Proposal from DHT and indicates where suppliers should update the document and return it in their response submission.

Suppliers should adhere to the timescales set out in section 6.1 in submitting their response and DHT will do so accordingly in responding to questions arising.

Responses should in all cases clearly and concisely answer the questions asked and answers should only be submitted using the format below.



Document Name	Document/ Section Title	Response Required
Supplier Instructions	This document	<ul style="list-style-type: none"> <li>Completed and returned document.</li> <li>Copy of supplier standard T&amp;C's</li> </ul>
Supplier Proposal	<ul style="list-style-type: none"> <li>Expression of interest</li> <li>Detailed work plan setting out how the requirements of the brief will be delivered.</li> <li>Budget breakdown</li> <li>Evidence of similar projects delivered</li> </ul>	<ul style="list-style-type: none"> <li>Word document</li> </ul>

## 11.1 Scope of Services

DHT is evaluating solution options for a supplier to work as consultant to deliver two workstreams. Suppliers can consider submitting a proposal for either or both workstreams.

### **Workstream D: Comprehensive Volunteer Development Consultation Exercise**

- (a) Review the Trust's current volunteering arrangements, practices, and management.
- (b) Identify the needs of the community with regards to volunteering (through conversation with current and past volunteers, Consultant working on Stakeholder Engagement, and external volunteer organisations in Dacorum).
- (c) Identify current volunteering opportunities for the Trust (both virtual and in person), through an outline of short-term pilot projects.
- (d) Identify future volunteering opportunities for the Trust (both virtual and in person) which accord with the ambitions of the Trust.
- (e) Using the above, create a series of recommendations that reflect both the long- and short-term needs of the Trust. This will include recommendations for the Trust's immediate improvement to volunteering arrangements.

The outcomes of this review and consultation will contribute to a Dacorum 30:30 Strategy that reflects on our current collections and operating practices. This plan will form the basis of our Dacorum 30:30 vision and future business model and collections policies.

The outcomes of this consultation work will support DH to apply for funding that will allow DH to put in place a long –term strategic plan that will ensure:

- **Heritage will be in a better condition** – following the project there will be a clear plan for the effective care and conservation of the existing and future collections.
- **People will have developed skills** – the project will identify development opportunities for both staff and volunteers. These skills will include heritage care and conservation as well as engagement and interpretation. The Board will have the means to develop strategic fundraising plans to deliver a major capital project.

- **People will have learned about heritage leading to change in ideas and actions** - the Comprehensive Stakeholder Consultation Exercise will significantly raise awareness of heritage in Dacorum. It will lead to more opportunities to reach into communities not previously engaging with local history challenging current ideas about heritage and introducing scope for activities that promote a sense of place and belonging.
- **People will have greater wellbeing** - building on the stakeholder engagement we will, in the longer term, develop improved services that respond to the needs of the local community. These will include more opportunities for socially isolated older people and for young people. DH's staff and volunteers' wellbeing will be immediately improved through the purchase of operational equipment.
- **The funded organisation will be more resilient** - The project will give us the information we will need to develop a capital fundraising campaign for a project which will increase our resilience. Understanding our audiences better to provide services that we know are wanted and needed will enable the development of sustainable revenue plans.
- **The local area will be a better place to live work or visit** - This project will embed heritage in the local place strategies being developed by Dacorum Borough Council.
- **Long term environmental sustainability and inclusion** - The project will enable us to build into the Statement of Requirements our ambition to be Net Zero Carbon by 2030, and to embed equality, diversity and inclusion as core principles in our revised vision and strategy.

## **Budget**

Funding allocation £8,000 excluding VAT

## **Workstream E: Fund-raising feasibility study and outline fundraising strategy.**

To establish whether it is feasible to raise circa £3million for a new Heritage Centre for DH, and

- a) Where funding might come from, the types of funders and how much might be raised.
- b) What DH will need to put in place to run a campaign of this scale and the resources required to be deployed.
- c) The potential timetable of a fundraising campaign.
- d) Delivery of a Fundraising Feasibility Review and Outline Fundraising Strategy Report.

We expect the following donors/funder groups to be considered:

- The National Heritage Lottery Fund: DH previously applied to the National Heritage Lottery Fund for funding to refurbish a former local registry office, known as "The Bury", in Hemel Hempstead. although the bid was unsuccessful, we intend to apply to them again, especially in the context that we were invited to revert with new proposals.
- Other statutory and public funds.
- Trusts and foundations.
- Individuals – for major and public appeal gifts.
- Local companies such as Atlas Copco (manufacturers of industrial tools in Hemel Hempstead), GSK (successor to William Cooper's agricultural insecticides business in Berkhamsted), Eastman Kodak (manufacturers of photography related products in Hemel Hempstead) and Sir Robert McAlpine (construction company based in Hemel Hempstead).

## **Budget**

Funding allocation £8,000 excluding VAT

## **11.2 Locations**

The Museum Store is based in Clarence Road Berkhamsted HP4 3YL. The services are to be provided across the Borough of Dacorum.

## **11.3 Project Background**

This Project is being funded by a grant from The National Heritage Lottery Resiliency Fund and will deliver a well-researched Statement of Requirements by March 2024 that addresses both people and place.

We have leased our current premises from Dacorum Borough Council (DBC) for the last 20 years at a nominal rent. However, the Borough Council's strategic plan has identified our site for development within the next five years. We need to find a new home – quickly.

DBC has offered to consider DH's future physical infrastructure needs in its next Capital Budget and have been invited to submit a Statement of Requirements by March 2024, hence the urgency for this project. We can only be sure of providing a robust and relevant Statement by ensuring the views of all our stakeholders – the community, volunteers, and DH team – are considered, alongside the needs of the Collections we care for. We will also need to provide DBC with evidence of our ability to raise funds.

DBC's plans for redevelopment of the site coincide with a critical point in DH's development. Our current building is too small for the 130,000+ items we already care for, has significant environmental challenges and is inaccessible to visitors. Working space restrictions are limiting volunteering opportunities and reducing the ability to engage the community with the collections. Consequently, there is a window of opportunity to gain DBC support for a new, fit-for-purpose site for Dacorum's heritage collections and a hub for public engagement and volunteering.

## **12 Criteria for Evaluation**

1. Viability of Proposal
2. Prospective Supplier experience and reputation
3. Ability to deliver the services as outlined in the requirements.
4. Financial proposal
5. Resource approach

All of these will be assessed across written responses to this RFP.

## 13 Contractual Terms

The contract will be undertaken under the supplier's terms and conditions subject to these being acceptable to DHT.