# NHMF CONTRACT NUMBER 305

**Organisation National Heritage Memorial Fund**

**Department** Business Innovation and Insight

**Title of procurement** Grantee Support Partner (Innovation)

**Brief description of supply** The Heritage Fund is looking to appoint an innovation support partner to provide a tailored programme of non-financial support for heritage organisations as part of a future pilot initiative.

As part of our wider work to bolster cross-sector recovery and long-term resilience, this forthcoming innovation programme will seek to help UK heritage to explore, develop and test new approaches that have the potential to respond to long-range heritage workforce challenges. Discovery research which engaged with sector representatives evidenced workforce challenges as a consistent, persistent, and widespread theme across all heritage sectors with clear opportunities to experiment with new models of working and thinking.

As the first step, we want to provide experimenting practitioners from any sphere of UK heritage with a structured programme of support providing access to the time, skills, learning and peer support needed to stimulate and incubate new ideas for future heritage working practices.

This initial commission spans two phases:

* Pre-application workshops (May and October 2022)
* Cohort content design and facilitation across the two cohorts (August 2022 – June 2023)

NB: We anticipate two cohorts consisting of approximately 17 organisations (34 in total), will be awarded pilot funding by the Heritage Fund. Each cohort will work intensively with the innovation support partner over the initial 6 month period of their grant so that they are prepared and ready to prototype and test their ideas if further funding is secured.

**Estimated value of tender** £90,000K (inclusive of VAT and expenses)

**Estimated duration** 15 months

**Name of Heritage Fund Contact** Penny Yewers, Innovation Project Manager

 penelope.yewers@heritage.org.uk

**Timetable** See Below:

Response deadline: 6th April 2022 (noon)

Clarification Questions Deadline: 21st March

Clarification Questions posted: 29th March

Interviews: 20th or 21st April 2022. If you are unable to make this date, please indicate in your response.

Confirmation of contract: April 2022

Commencement of project: May 2022

Completion of project: June 2023

## Overview

The Heritage Lottery Fund (NLHF), now the National Lottery Heritage 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. We operate under the auspices of the National Heritage Memorial Fund (NHMF). Since April 2013 we have been operating under our current Strategic Framework: ‘A lasting difference for heritage and people’. See the [NLHF website](http://www.hlf.org.uk/aboutus/whatwedo/Pages/StrategicFramework2013to2018.aspx) for more details.

NLHF 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.

## Background

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 for heritage, people and communities which underpin our grant-making and the objectives set out in our [Strategic Funding Framework.](https://www.heritagefund.org.uk/sites/default/files/media/attachments/Heritage%20Fund%20-%20Strategic%20Funding%20Framework%202019-2024.pdf)

From 2021/22 we have sought to prioritise the following strategic funding objectives, in recognition of their importance to a sustainable long-term Covid-19 recovery response:

* **Resilience:** Support the organisations we fund to be more robust, enterprising and forward looking
* **Inclusion:** Ensure that heritage is inclusive
* **Wellbeing:** Demonstrate how heritage helps people and places to thrive
* **Economy:** Grow the contribution heritage makes to the UK economy

In recognition of the inevitable impact Covid-19 will have on the heritage sector and therefore our long ranging funding objectives, the Heritage Fund has been exploring how we can proactively work alongside organisations to support the development, testing and adoption of the new approaches required for heritage to continue to deliver positive impact for people, places and communities across the UK at a time of volatile and shifting operating contexts. In 2021 we commissioned Discovery Phase research (see Appendix I) to increase our understanding of the problem areas most important to heritage sector organisations and inform the shape of a specific funding package that would support organisations to respond to these problem areas in the wake of the Covid-19 pandemic. The Theory of Change for the programme can be found at Appendix II.

## The Commission and Project Scope

The innovation support partner will first support grantee organisations – both as a cohort and individually – in their journey over a 6 month period as they explore a problem area facing the heritage sector workforce. During this time grantees will seek to gather evidence of the problem, uncover potential solutions and create a plan for testing them in practice. After finishing this 6 month exploration phase, they will then be eligible to apply for further funding to take their idea forward.

The content of and way support is delivered to grantees is open, however we envisage some combination of structured learning, action-focused support and coaching.

Beyond direct grantee support, the innovation support partner will also provide some support to Heritage Fund staff as they prepare to deliver a new way of funding and reflect on progress throughout.

## Thematic focus

Based on the Discovery Phase research, we expect applicants may be interested in exploring workforce issues related to:

* Delivery models of care and interpretation that have potential to deliver lighter carbon footprint and wider reach
* Use of automation and artificial intelligence in day-to-day heritage work
* Practices that increase the diversity of the heritage workforce by reflecting multi-generational needs and skills exchange across the workforce
* Opening up access to global skills, knowledge and connections
* New models of partnership that extend beyond existing forms of organisational collaboration
* Radical approaches to lifelong learning and re-skilling including where there are known skills shortages for example in traditional craft and construction

## Overall funding journey

We plan to offer grants across three sequential phases, through which organisations may progress:

* Stage one: insight gathering and problem definition (6 months)
* Stage two: prototyping and solution testing (9 months)
* Stage three: consolidation, dissemination and next stage planning (12 months)

Although this creates a multi-stage funding pipeline for successful projects covering multiple years, this commission is to support applicants prior to applying, and grantees during the first stage of work so that they are prepared to begin building prototypes and testing their solutions in practice if they secure stage two funding. We anticipate intensive coaching to be particularly beneficial for grantees during that initial setup and exploration period.

## Indicative timeframes of support partner deliverables

|  |  |
| --- | --- |
| May 2022 | Pre-application support delivered |
| June 2022 | Support to NLHF staff |
| August 2022 | First grantee cohort commences 6 month insight gathering and problem definition |
| October 2022 | Pre-application support delivered |
| January 2023 | Second cohort commences 6 month insight gathering and problem definition |
| June 2023 | Support role concludes |

## Responsive approach

While we envisage a structured support programme, we are looking to engage a support partner who can be agile and responsive to grantee needs. Any support delivered should be shaped around their needs and adapted according to feedback and progress throughout the programme.

## Wider beneficiaries

Beyond the direct grantees of this pilot, the wider heritage and innovation sector will be secondary beneficiaries of this work. It is therefore expected that the support partner will reflect on the progress made and share this learning externally at key moments throughout the programme for wider benefit. This may also include, where resources allow, the delivery of additional sessions with some Heritage Fund grantees working on innovation outside the direct cohort.

Beyond this sector wide value and providing direct grantee support (the primary focus of the brief), we are also looking for the delivery partner to provide additional support to Heritage Fund staff as they navigate this new approach to funding. This might include:

* Support/guidance for staff as they prepare to assess applications for funding in relation to innovation; and
* facilitating sessions to maximise learning for staff as we deliver the pilot and the different trajectory of ideas as grantee work progresses.

## Objectives

Through this pilot initiative the Heritage Fund wishes to provide the environment and support for grantees to test and develop their idea whilst progressing their development and learning.

The delivery of this support programme alongside grant funding will be an important contributor to the long term impact of the funding programme for participant organisations, investing in staff and enabling organisational growth that endures beyond the grant programme itself.

By contracting additional wrap-around support for grantees we hope to:

* Facilitate skills acquisition for participants
* Increase chances of success of emerging interventions
* Facilitate shared learning and connection across the cohort/lab group
* Leave organisations and the heritage sector stronger, even after the pilot financial investment has concluded.

Beyond these objectives for grantees themselves, the Heritage Fund wishes to create a valuable resource for the wider heritage sector. We are seeking a partner who can openly reflect on what is being learnt from the approach and share this publicly through agreed channels.

**Methods & Outputs**

The Heritage Fund does not have a prescribed approach that it is seeking for this work. The approach to delivery should be proposed by bidding organisations, clearly setting out their methodology to meet the objectives of the programme and the support needs of grantees. While we are open to a range of approaches, we would like to ensure that any support is action focused and works within the stretched resources of participants in a post-Covid-19 operating environment.

In the response, please detail your approach, any individuals who would be delivering the support, any partnerships you would deploy and how you would shape the support package in response to the needs of grantees including an indicative outline of a programme for participants.

The below top-level outputs are intended as illustrative only, with specific outputs to be agreed with the successful innovation support partner on appointment.

## Pre application phase (May – June and October – November 2022)

* Work collaboratively with NLHF staff to deliver pre-application workshops/webinars to build capacity of organisations in preparation for applying to the fund and support the promotion of the funding opportunity across the sector
* Consult with organisations to start to shape support offer
* Pre-application support will be required when the fund initially opens as well as when the second round of applications opens in October 2022.

## Delivery phase – Insight gathering (August 2022 – June 2023)

### Cohort based support including:

* Convene grantees at the commencement of the programme and at key moments throughout to facilitate skills sharing and learning
* Coach organisations through a collaborative problem definition process
* Identify and facilitate connections across the cohort where there may be shared objectives or approaches and the potential for future collaboration
* Create virtual spaces for collaboration and sharing on an ongoing basis, or suitable alternative arrangements subject to the needs of the cohort

### Individual organisation support:

* Provide bespoke support to organisations, coaching and advising on how to conduct the work to best effect
* Coach funded organisations through a prototyping/ solution generation process
* Connect grantees with specific experts where appropriate

### Reflection and learning:

* Work with organisations in a way that encourages reflective practice
* Deliver a minimum of three learning reflections throughout the project that will be shared externally. These should be relevant and useful for a wider heritage audience.
* Deliver guidance to Heritage Fund staff as needed

We expect the project to begin in May 2022 and be completed by June 2023.

The anticipated budget is £90,000 inclusive of all expenses and VAT. The contract will be let by the National Heritage Memorial Fund.

The payment schedule will be agreed on appointment on the basis of the successful contractors proposal but is anticipated to be in accordance with the following milestones:

1. 25 % upfront
2. 25% at completion of pre-application support for cohort 2 applicants
3. 25 % at the end of cohort 1 exploration phase
4. 25 % at the end of cohort 2 exploration phase

**4 Award Criteria**

Tender responses submitted will be assessed by the Heritage Fund against the following Quality Criteria.

## 70% of the total marks will be awarded to Quality

A proposal for undertaking the work should include:

1. your understanding of the overall project and objectives (weighted at 20%)
2. a detailed methodology for delivering the project (weighted at 20%)
3. details of staff allocated to the project, together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified; (weighted at 20%)
4. the allocation of days between members of the team and activities; (weighted at) 20%
5. a timescale for the proposed activities when carrying out the project; (weighted at 20%)

Please also ensure your response addresses the following points:

* Availability/timelines – start dates and availability.
* Use of any third-party products or providers – to be explicitly detailed in the proposal along with any associated support costs and arrangements.
* Any interdependencies/risks that might occur and have an impact on the delivery of the project.
* Any in-kind support you will be bringing to the delivery of the project

### 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 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 | Response is comprehensive and supported by good standard of evidence. Gives the Hertage 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. May exceed 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 the ability of the Bidder to deliver the contract. May exceed the Heritage Fund’s requirements in most respects. |

## 30% of total marks will be awarded for Price.

The evaluation of price will be carried out on the schedule of charges provided in response to outlining an overall cost for the work and the daily charging rate of individual staff involved.

**Price Model 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. The 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 26.8% and so on. 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 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 you proposal/tender/bid whether you do pay your staff the living wage.

Bidders shall complete the schedule below, estimating the number of days and travel and subsistence costs associated with their tender submission.

**TABLE A: (firm and fixed costs template)**

| **Cost** | **Post 1 @cost per day****(No of days)***e.g. Project Manager/ Director**@ £2* | **Post 2 @cost per day****(No of days)***e.g. Senior Consultant/manager/researcher**@£1.5* | **Post 3 @cost per day****(No of days)***Junior* *Consultant/equivalent* *e.g. £1* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Heritage Fund | *Example 0.5* | *1* | *1.5* | *3* | *£4* |
| *[Add as necessary]* |  |  |  |  |  |
| *[Add as necessary]* |  |  |  |  |  |
| *[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 this document)

**Notes: The Heritage Fund reserves the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low quality response. The Heritage Fund also 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 tender process

# 5 Procurement Process

The Heritage Fund reserves the right not to appoint and to achieve the outcomes of the work 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 up to three of the (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.

Bidders are responsible for all expenses when attending such meetings.

Tender proposals must be sent electronically via e-mail before the tender return deadline of **6thApril 2022 at noon** to the following contact:

Penelope Yewers

Subject: Innovation Support Partner Proposal

Email: penelope.yewers@heritagefund.org.uk