**Invitation to Tender**

**Strategy Development Research**

**Ref: NHMF 308**

**Schedule 5**

**Tender Response Document**

# SCHEDULE 5 – TENDER RESPONSE DOCUMENT:

# General Details:

Organisation’s full name: <Please insert here .......>

Business address (this will be the address the Fund will use to send any correspondence to you): <Please insert here .......>

Registered address (if any - this will be the address registered with Companies House): <Please insert here .......>

Company number: <Please insert here .......>

VAT Registration number (if any): <Please insert here .......>

Charity Registration number (if any): <Please insert here .......>

Are you classified as an SME organisation: <Please insert here .......>

Are you classified as a Voluntary Community and Social Enterprise (VCSE) organisation: <Please insert here .......>

# Organisation’s Representatives:

Name: <Please insert here .......>

Title: <Please insert here .......>

Telephone: <Please insert here .......>

Email: <Please insert here .......>

# Method Statement:

Please insert your method statement below (max words 2,000 words)

It is essential that you –

* Demonstrate a clear understanding of the aims, objectives and main concerns of the research
* Demonstrate that the methods selected are appropriate to the research requirements set out in this brief

<insert details here … >

# Statement regarding Previous Experience:

Please insert details (ideally three) of your previous experience below, demonstrating a record of producing high quality research reports to support strategy development in the Heritage and/or Cultural sector.

In order to respect commercial confidentiality, you can state the contract value to within £20,000 of the actual amount. For example, a contract with a value of £70,000 could be expressed as £60,000 - £80,000 or as £70,000 to £90,000, etc.

|  |  |  |  |
| --- | --- | --- | --- |
| **Year** | **Client** | **Approx. value** | **Project details, and why you feel it demonstrates your previous experience in relation to our requirements:** |
|  |  |  | <insert details in the table. Max 300 words per example> |
|  |  |  | <insert details in the table. Max 300 words per example> |
|  |  |  | <insert details in the table. Max 300 words per example> |

# Project Plan:

Please insert a project plan relating to the project.

This should show all the key phases of the research, tasks for each phases and roles and responsibilities for each member of the team

(max words = 500 words)

<please send your response to this question as a separate file. Please use the file name ‘Project Plan for NHMF 308’ >

# Staffing Statement:

Please insert 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;

(Max words = 500 words)

<insert details here … >

Please attach CVs for the key staff (minimum of 3 CVs, maximum of 5 CVs. Max words per CV = 500 words)

<please send your response to this question as a separate file. Please use the file name ‘CVs for NHMF 308’ >

# Financial ‘Bid’ Model:

Please append a detailed financial (or ‘bid’) model. This must be provided as a spreadsheet, and include the following –

7.1 - details of staff allocated to the project (these must be the same as those identified above), together with experience of the contractor and staff members in carrying out similar projects. The project manager / lead contact should be identified;

7.2 - the allocation of days between members of the team;

7.3 - the daily charging rate of individual staff involved;

7.4 - an overall cost for the work shown as a total, matching the response given to question 8 below.

(word limit not applicable; this response should be a spread sheet).

<please send your response to this question as a separate file. Please use the file name ‘Bid Model for NHMF 308’ >

# Tendered ‘Bid’ price:

Please state your Tender price <insert here £………… (excl. VAT) >

Please state your Tender price <insert here £………… (incl. VAT) >

# Carbon Net Zero & Sustainability Statement:

Please insert a statemen below that identifies the key steps your organisation is taking to become Carbon Net Zero (along with the year you aim to become Carbon Net Zero) along with any other Sustainability initiatives (max words 2,000 words)

<insert details here … >

# Other requirements:

10.1 – Standards: Please insert here any specific standards that will apply. These will form part of any contract entered into (see Clause A3.1.2). <Please insert here .......>

10.2 - Accessibility: The Service Provider must comply with the Accessibility requirements set out in the Fund’s Specification Brief and attached to the Statement of Work as Appendix 1. ). <Please insert details here .......>

10.3 - Assistance of the Fund: Please insert here any assistance that will be required. Any requirements (if agreed) may form part of any contract entered into (see Clause C5.2) <insert details here…>

10.4 - Progress reports due date: Please insert here details of your proposed submission of progress reports. Any requirements (if agreed) may form part of any contract entered into (see Clause C6.1) <insert details here … >

10.5 - Final Progress report due date: Please insert here details of your proposed progress report due date ( see Clause 6.2) <insert details here … >

# Terms & Conditions of Contract (including Liabilities):

Please confirm you can comply with the Terms & Conditions of the Contract <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>

Please confirm you can comply with the following Terms & Conditions of the Contract –

* Service Provider’s liability limitation - (Clause E1.4) = £250,000 <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* The Fund’s liability limitation - (Clause E1.5) - The Fund’s liability is limited to an amount equal to the total charges payable under this Contract. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Please confirm you can comply with the Terms & Conditions of the Contract <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Insurance period - (Clause E2) - The Service Provider must take out and maintain insurance for the term of this Contract and for six years after its termination or expiry. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Public liability - (Clause E2) - £1,000,000 (one million pounds) for any one incident. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>
* Professional indemnity - (Clause E2) - £1,000,000 (one million pounds) for any one incident. <Please insert either ‘yes’ or ‘no’ here to indicate your acceptance>

Please identify any other Terms & Conditions of the Contract that you would not be able to comply with <Please insert here…..>

# Payment Details:

Time of payment - (Clause D1.1) - insert payment schedule or time for payment, e.g. 30 days after the Fund’s receipt of a valid invoice. <Please insert here .......>

Method of payment - (Clause D1.1) insert method, e.g. cheque or electronic funds transfer. <Please insert here .......>

Time of invoice – (Clause D1.2) – e.g. after completion of all the Services. <Please insert here .......>