



**INVITATION TO TENDER BRIEFING  
DOCUMENT:**

**STRATEGY DEVELOPMENT RESEARCH**

**OUR REF: NHMF 308**

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### **STRATEGY DEVELOPMENT RESEARCH - OUR REF: NHMF 308**

#### **1 Purpose of this document:**

This briefing document sets out the high level requirements of the National Lottery Heritage Fund ('the Fund').

In accordance with the timetable below, various additional documents will also be issued.

#### **2 Overview:**

This research has two main strands, with the overarching aim to find out how the Heritage Fund can support the UK's heritage over the next 10 years, looking at perceptions of heritage and priorities for the Heritage Fund. The first strand comprises a large scale survey, supported by qualitative research with the UK public. The second strand is to run a short series of workshops with heritage sector stakeholders.

Full details will be given in the ITT.

The total estimated value of this contract (both strands) will be £85,000 inc. VAT. Please note that the Contracts Finder / Find a Tender publication sometimes requests financial figures to be stated as exclusive of VAT, in which case the value will be £70,833 excl. VAT.

#### **Strand One – Public Perceptions of Heritage**

- To investigate and present the current position on UK-wide public perceptions of and sentiment towards heritage.
- To understand how attitudes to heritage have changed due to the impact of COVID-19
- To examine how people relate to heritage in their local area.
- To understand views on how public bodies should decide which geographic areas should be prioritised for funding
- To find out the public view on the importance of heritage including what should be prioritised for support by public bodies

#### **Strand Two – Priorities for Heritage**

- To understand what high level changes and developments organisations working in heritage anticipate for the next 10 years.
- To find out how well the Heritage Fund's priorities are aligned with the current needs and priorities of organisations working in the heritage sector, and how these will need to change over the next 5-10 years.
- To understand heritage organisations' priorities for Lottery funding including, for example:
  - o Balance of local vs national projects
  - o Balance of targeted and open funding
- To understand organisations' attitudes to the Heritage Fund's taking a place-based approach to funding including:
  - o what heritage can bring on a regional/country and local/community level over the next 5-10 years.
  - o how geographic areas should be supported and/or prioritised for funding
- To test the Heritage Fund's current framework of objectives and outcomes to determine which continue to represent priorities for heritage.
- To understand what role the Heritage Fund can play, beyond the distribution of Lottery funding, to best support the UK's heritage

The research will need to cover the full breadth of the UK's heritage, including:

- Areas, buildings and monuments
- Community heritage
- Cultures and memories
- Industrial, maritime and transport
- Landscapes, parks and nature
- Museums, libraries and archives

### **3 Procurement Timetable:**

The procurement timetable will be as follows :

Table 1: Procurement process summary and indicative timetable –

Activity:	Date:
Notice on Contracts Finder / Find a Tender Service	16 June

Briefing document issued	16 June
Invitation to Tender issued	17 June
Contract issued	17 June
Evaluation Model issued	20 June
Tender Response Document issued	20 June
Deadline for receipt of written questions	Thursday 23 June (by 12 noon)
Fund to upload responses to bidder questions.	TBC
ITT Stage Bidder event	TBC, if held.
Deadline for submitting tender returns	Thursday 7 July (by 12 noon)
Evaluation period	7 – 11 July
Bidder interviews	Clarification meetings may be held with shortlisted consultants and would take place on week commencing: 11 July.
Confirmation of contract	W/C 25 July
Standstill period	TBC

#### 4 Project Timetable:

A project plan with specific deliverables\* and timetable will be agreed with the successful consultant. However, The National Lottery Heritage Fund expects the following deliverables in accordance with the following timetable as a minimum:

<b>Deliverable/Key Milestones*</b>	<b>Due date</b>
Project Initiation Document, including evaluation plan and methodology, timelines	Within one week of project initiation.

and dependencies.	
Inception Meeting to agree plans.	Within one week of project initiation.
Survey	Delivered during August 2022
Public Workshops / Interviews	Delivered during August 2022
Stakeholder Workshops	Delivered during August 2022
Draft report	26 August 2022
A final report with structure agreed with the Heritage Fund, and accompanying slide deck.	9 September 2022

The above represents our minimum requirements.

The Heritage Fund reserves the right to amend this timetable where required.

## 5 Expressions of Interest:

All expressions of interest should be submitted via email to the following address:

[procurement@heritagefund.org.uk](mailto:procurement@heritagefund.org.uk)

**IMPORTANT:** due to the volume of correspondence that we receive, please ensure that the subject field of your email begins with the following reference number:  
NHMF 308

Bidders should use the 'delivery receipt' and 'read receipt' function to verify that their email has been received. The ITT submission date and time are as indicated in Table 1 above. Failure to return Bids by the due date or in the required format may disqualify a Bidder from the Procurement.

May I take this opportunity to thank you for your interest.

### **Mark Abrahams**

Procurement Manager, Business Services Division

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