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Tender

Heritage and place research

National Heritage Memorial Fund

F02: Contract notice

Notice identifier: 2021/S 000-009151

Procurement identifier (OCID): ocds-h6vhtk-02ab30

Published 28 April 2021, 3:20pm

Section I: Contracting authority

I.1) Name and addresses

National Heritage Memorial Fund

ST KATHERINE'S WAY

LONDON

E1W 1UN

Email

Bii.Admin@heritagefund.org.uk

Country

United Kingdom

NUTS code

UK - United Kingdom

Internet address(es)

Main address

<https://www.heritagefund.org.uk/>

I.3) Communication

The procurement documents are available for unrestricted and full direct access, free of charge, at

<https://www.heritagefund.org.uk/>

Additional information can be obtained from the above-mentioned address

Tenders or requests to participate must be submitted electronically via

<https://www.heritagefund.org.uk/>

I.4) Type of the contracting authority

Body governed by public law

I.5) Main activity

Other activity

LOTTERY DISTRIBUTION - HERITAGE

Section II: Object

II.1) Scope of the procurement

II.1.1) Title

Heritage and place research

Reference number

NHLF 291

II.1.2) Main CPV code

- 73200000 - Research and development consultancy services

II.1.3) Type of contract

Services

II.1.4) Short description

We are looking to commission research that informs how The Fund delivers on its strategic objective to "demonstrate how heritage helps people and places to thrive", through our approach to our open grants programme and strategic funding (e.g. campaigns, bid solicitation, Areas of Focus).

Findings must be consistent with the Fund's strategic focus and capacity, and reflect the unique nature of the Fund's heritage remit as an Arm's Length Body (ALB) and distributor of Lottery Funds.

The aim of this research is to understand how the evidence on place based funding can inform The National Lottery Heritage Fund's approach to meeting its strategic objective to demonstrate how heritage helps people and places to thrive.

II.1.5) Estimated total value

Value excluding VAT: £25,000

II.1.6) Information about lots

This contract is divided into lots: No

II.2) Description

II.2.2) Additional CPV code(s)

- 73200000 - Research and development consultancy services

II.2.3) Place of performance

NUTS codes

- UK - United Kingdom

II.2.4) Description of the procurement

We are looking to commission research that informs how The Fund delivers on its strategic objective to "demonstrate how heritage helps people and places to thrive", through our approach to our open grants programme and strategic funding (e.g. campaigns, bid solicitation, Areas of Focus).

Findings must be consistent with the Fund's strategic focus and capacity, and reflect the unique nature of the Fund's heritage remit as an Arm's Length Body (ALB) and distributor of Lottery Funds.

The aim of this research is to understand how the evidence on place based funding can inform The National Lottery Heritage Fund's approach to meeting its strategic objective to demonstrate how heritage helps people and places to thrive.

There are three strands to the research and the objectives for each strand are detailed below.

Strand 1: How effectively is the Fund delivering on our strategic place priorities?

- With the aim of informing strand 2 what does the grant funding data show us about place based funding in recent years? Subject to data availability and quality, this may include:

- o Number of grants awarded/rejected on place based projects
- o The activity of the awarded place based projects
- o Geographical spread
- o Number of grants awarded to areas of deprivation
- o Partnership funding situation for grantees

- What do the evaluations of the Fund's recent place-based programmes show us about

The Fund's place-based role and impact?

- What do the evaluations tell us about what have been the key benefits and challenges of the more holistic, geographic or partnership approach fostered through these programmes?

Strand 2: What does the evidence tell us about how The Fund should advance its place priorities through financial and non-financial approaches?

This should be informed by external evidence, the evidence established in Strand 1 and the Fund's strategic focus and capacity. Areas that should be explored include:

- Investment - what are the most effective approaches and mechanisms to invest in place at the appropriate scale?
- Partnerships - how can place-based partnership working be most effective? This could include consideration of alignment with local strategies, national funding and collaboration with other funders.
- Non-financial support - what activity beyond financial support would be beneficial at a national and local level to maximise the impact of our investment within places? This could include consideration of our national policy and advocacy work on place, or the provision of non-financial support to projects to enhance their impact on place.
- Data - using our current grant management system, and the benchmark established in Strand 1, what should we be measuring to inform The Fund's Key Performance Indicators on place?

When analysing the evidence for each of these areas the consultant should consider:

- The wider evidence and learning from past campaigns and programmes can be embedded within our current funding approach of an open grants programme.
- How the findings would support delivery of our strategic priorities and build on the current position set out in Strand 1.
- The wider evidence about what works within these areas and what this tells us about how we should prioritise and focus. Where relevant, this should include case study examples.
- The political and economic context of Covid-19, and any policy differences that need to be considered for the different nations.
- Alignment with the strategic priorities of other national partners and funders.

Strand 3: What options are open to the Fund to advance its place priorities through our investment in the short, medium and longer term?

These should be informed by engagement with the Fund and could be presented as part of a menu of short, medium and long-term options to act on based on the evidence highlighted in Strand 2. Options should be consistent with The Fund's strategic priorities, current funding approaches (including open grant funding) and capacity.

Short-term is defined as business planning for the next 12 months. Medium-term is defined as the remaining Strategic Funding Framework period to 2024. Long-term is defined as the next SFF period (2024 - 2029).

1.11 The research will be used to support the Fund's strategic planning and policy development. Key audiences for the research include:

- The Fund's staff
- Other funders, heritage stakeholders, policy makers and interested parties

1.12 All outputs should be prepared on the basis that they could be published externally.

2 Method

2.1 A method for the work is open for consultants to propose. However, we anticipate that it will include some or all of the following:

2.1.1 Conduct quantitative analysis of The Fund's grant data to understand and benchmark our place-based funding to date.

2.1.2 Review a sub sample of place based funded projects to understand in more detail the types of activity funded to deliver our place based strategy through reviewing qualitative application form data.

2.1.3 Use relevant external and internal research to conduct a review of place-based research to look at the effectiveness and considerations for successful place-based funding, which could be adapted for funding Heritage place based projects. This would include examining The Fund's own evaluations of recent and ongoing place-based initiatives (see Appendix B).

2.1.4 Consult with a small group of key national stakeholders (approx. 10) to understand their priorities, perceptions of the Fund's place based approach and opportunities to strengthen this. The Fund will suggest some of the interviewees and the list will be compiled collaboratively.

2.1.5 Engage with the Fund's staff to understand The Fund's context and current approach to place based investment.

2.1.6 Present on emerging findings to enable the co-creation of options to support The Fund to integrate place-based funding into the open grants programme and strategic funding in the short, medium, and longer term (Strand 3).

3 Outputs

3.1 The following outputs will be required:

3.1.1 Short interim findings report provided in July.

3.1.2 a draft final report in Word end of August

3.1.3 a final report in Word containing key evidence and the cocreated options for The Fund's to meet its strategic objective on place in September.

3.1.4 a slide deck summarising the findings.

3.1.5 a set of research data, to be stored in a readily accessible format such as Excel.

3.2 All reports must adhere to the Fund's accessibility and formatting guidance (appended). We also expect reports to follow the layout advised in our evaluation guidance.

3.3 We expect all our evaluations and research projects to generate evidence about the inclusivity of our funding and our performance in addressing inequality. Bidders must be committed to this principle and ensure evidence gathering addresses this requirement

3.4 The initial findings will be confidential to the Fund. The Fund may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.

3.5 All reports to include appendices as agreed between the Fund and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in electronic format and hard copy if requested.

3.6 The successful bidder must comply with all of the requirements of the Data Protection Act 2018 and shall ensure appropriate research consents from interviews or any data collection.

3.7 The successful bidder will be expected to discuss and present findings at appropriate times, to internal and external audiences, including our Board, our Senior Management

Team, Grantees, policy makers and other external stakeholders. The purpose of these presentations is to enable lessons to be learned and key policy and practice issues to be highlighted as the evaluation progresses.

3.8 We expect all projects we fund to adhere to the Social Research Association (SRA) ethical guidelines. If your proposal raises particular ethical issues, you must indicate what they are and what your strategy for addressing them is.

II.2.5) Award criteria

Price is not the only award criterion and all criteria are stated only in the procurement documents

II.2.7) Duration of the contract, framework agreement or dynamic purchasing system

Duration in months

4

This contract is subject to renewal

No

II.2.10) Information about variants

Variants will be accepted: No

II.2.11) Information about options

Options: No

Section IV. Procedure

IV.1) Description

IV.1.1) Type of procedure

Open procedure

IV.1.8) Information about the Government Procurement Agreement (GPA)

The procurement is covered by the Government Procurement Agreement: Yes

IV.2) Administrative information

IV.2.2) Time limit for receipt of tenders or requests to participate

Date

25 May 2021

Local time

12:00pm

IV.2.4) Languages in which tenders or requests to participate may be submitted

English

IV.2.6) Minimum time frame during which the tenderer must maintain the tender

Tender must be valid until: 30 September 2021

IV.2.7) Conditions for opening of tenders

Date

26 May 2021

Local time

9:00am

Section VI. Complementary information

VI.1) Information about recurrence

This is a recurrent procurement: No

VI.2) Information about electronic workflows

Electronic ordering will be used

Electronic invoicing will be accepted

Electronic payment will be used

VI.4) Procedures for review

VI.4.1) Review body

NHLF

LONDON

Country

United Kingdom