

Essential Networks project

Invitation to tender for Business Development Consultant

1 Summary

Heritage Trust Network seeks to appoint an experienced consultant, familiar with the heritage sector to carry out a consultancy as part of the development phase of its National Lottery Heritage Fund project, Essential Networks. The consultant will work closely with the Network's Chief Executive to undertake research into income generation opportunities for the Network, to help achieve one of the project's target outcomes of increasing our financial resilience. At the end of the assignment the consultant will produce a report outlining the way forward for the development of earned income by the Network.

2 Background

Heritage Trust Network is the membership body for independent community organisations, charities and social enterprises that are saving, restoring and managing historic buildings, parks, gardens, canals and railways. Our membership includes both organisations specifically set up to save heritage sites and community organisations that deliver other types of services and have chosen to operate from historic buildings and spaces. We also welcome individuals, businesses and local authorities that support local heritage action. Together we organise conferences, site visits, meetings and online resources where we can network and learn from each other and meet experts and funders.

Essential Networks is a major development and resilience project for Heritage Trust Network, our members and UK heritage. It will resource the Network over the next five years as a major sector infrastructure organisation to provide significantly enhanced support to small and medium sized community-led heritage organisations. As part of the development phase of this project we want to bring dedicated capacity to the challenge of increasing our earned income. This is an objective from our Strategic Plan, but hitherto we have lacked the staff capacity to pursue it as vigorously as required.

Over the past three years we have delivered a £90,000 contract for Architectural Heritage Fund organising learning and networking events as part of their Open High Streets: Transforming Places Through Heritage project. We have tested the idea of running panel-based strategic reviews for our members. One such review has taken place and was reasonably successful. We currently have 23 Partner (i.e. business) members and 2 Partner Plus members (paying a higher fee). We receive some sponsorship income for our annual conference.

Alongside this invitation to tender we will be commissioning a freelance Events and Partnerships Associate who will be tasked with delivering a programme of income-earning events and recruiting further Partner members and attracting additional sponsorship for Network activities. These represent the income-earning activities where we already have a track record. This consultancy commission should review these activities and develop a strategy for growing income from them and propose new income-earning activities for the Network.

3 Objective

The objective of the assignment is to establish how the Network can significantly increase its earned income and develop a strategy to make earned income as a 'department' or 'profit centre' a sustainable part of our operation, and so improve our financial resilience. This is defined as creating sufficient income to employ a dedicated business development member of staff (full-time, part-time or freelance) who can generate new business, *and* make a reasonable financial contribution to the organisation. We do not expect to achieve this position immediately following the contract but want to see a clear pathway towards it.

A key issue to be addressed is that we do not want to be competing with our members. This includes the larger heritage trusts who undertake consultancy work and our Partner (i.e. business) members. There is scope however for exploring how we can work in partnership with these members.

4 Scope of services

The work required is as follows:

1. Research and development

- Intensive discussions with Network staff and trustees, research including discussions with partner organisations to identify the business development opportunities open to the Network. These are likely to include the following:
 - Increase in the number of Partner members, and development of services for businesses in the heritage sector.
 - Increase in sponsorship income
 - Management of learning events and programmes for other bodies
 - Ticketed conferences, trade fairs and other events for audiences beyond our membership
 - Paid-for strategic reviews for members (note that we will be providing a limited number of strategic reviews on a funded, or part-funded, basis but we want to understand if there is demand for more, funded independently by the beneficiary organisations).
 - Additional services to members.
 - Commissions from local authorities to develop new non-profit vehicles for local heritage regeneration.
 - Research, engagement and learning contracts for Government heritage agencies and other key partners.

The list above is not exclusive, and we would welcome suggestions for other income generation ideas.

- Researching and discussing potential partnerships for commercial activity.
- Review the proposal to create an expert panel consisting of experienced senior staff from the Network's larger non-profit members and from our Partner members. We see the expert panel as essential to be able to give us the capacity to deliver commercial services. Such a panel would work on the model of design review panels, where professionals commit to give their time to specific activities managed by a non-profit agency, in return for an 'honorarium'. The honorarium is usually less than their normal daily rate but recognises that their time is being valued.

A report of this research and development phase should be presented to an informal Board workshop by the end of May.

2. Strategy development

Work with the Chief Executive, Board and staff team to develop a strategy to move towards creating a sustainable earned income 'department' within the Network, as explained in 3 above. Such a strategy should include proposals regarding any further investment in business development.

A written earned income development strategy should be presented to the board in July including a financial plan, showing upfront investment and income/expenditure over at least three years.

5 What are we looking for?

We are looking for a consultant who has:

- An understanding of the institutional and business context of Heritage Trust Network's work
- Business development experience gained working for a heritage trust, a consultancy, a public body commissioning consultancy, or as a freelance practitioner.
- Creativity and entrepreneurial flair
- Excellent interpersonal skills, including the ability to articulate the Network's unique selling points
- Ability to conduct business research, including market research and development of financial models and to develop business plans and strategies

This commission could be delivered by an organisation or a freelance individual. If the former, we will need to have a lead consultant identified who will be our primary point of contact and responsible for the delivery of the work.

6 Timetable

The work should be completed between March and June 2023. The strategy needs to be available to present to the Board meeting on 13th July.

7 Budget

The maximum budget for this work is £12,000 plus VAT including all fees, expenses and materials. A payment schedule will be agreed with the appointed consultant.

8 How to apply

Bidders are required to

1. Complete [this online form](#) to provide business information (if you are submitting a response to more than one invitation to tender you need only do this once). We advise you to do this as early as possible so that we are aware that you are bidding and can share with you any clarifications that we issue.
2. Submit a written response to the brief of no more than 6 pages providing information on:
 - People: Details of the individuals that will undertake this work highlighting how they meet the requirements set out above at section 5. Specify who will be the lead consultant.

- Experience: Three relevant examples of where you have undertaken similar work in the past
- Approach: Outline your response to the brief above and how you will approach the different phases of the work.
- Budget breakdown: A breakdown of time allocated for each element of your programme and a total cost including expenses.
- References: Contact details from two projects you have been involved with that we can contact for a reference

Note that we will not accept any other materials beyond 6 pages. Please do not attach any other appendices or supporting documents. Additional documents will not be considered. Your submission should be a pdf. The minimum font size for your submission should be 11pt. We will not be liable for any costs you incur in submitting your tender.

If you are submitting proposals for more than one of the consultancy/associate commissions that we are currently advertising you may submit, in addition to the separate tenders for each opportunity, a single-page document of no more than 300 words explaining the benefits of combining those commissions and the synergies to be achieved.

Tenders should be emailed to David Tittle david.tittle@heritagetrustnetwork.org.uk by midday on 6th February. We reserve the right not to consider any submissions where the tender document or business information form is received after the deadline.

Any clarifications should be emailed to David Tittle david.tittle@heritagetrustnetwork.org.uk and they will be answered in writing. Clarifications may be shared with all known bidders. We cannot guarantee to answer clarification queries after midday on 3rd February.

We reserve the right not to appoint.

9 Procurement timescale

15 th December 2022	Early notification of opportunity (expressions of interest requested)
13 th January 2023	Invitation to tender advertised
Midday 6 th February	Deadline for submissions
w/c 20 th February	Interviews
24 th February	Appointment

10 Evaluation

Responses will be evaluated on the basis of the initial submission. Higher scoring bidders' references will be taken up and they may be invited to interview. Scores may then be adjusted. Responses will be scored as follows:

Score	Classification	Characteristics
4	Excellent	Exemplary response. Comprehensive and relevant information is provided and the response provides the evaluation panel with a very high level of confidence that the bidder will be able to meet the requirements of the project if appointed, with no reservations or concerns arising from the response.

3	Good	Comprehensive and relevant information is provided and the response provides the evaluation panel with a high level of confidence that the bidder will be able to meet the requirements of the project if appointed with no more than one limited reservation or concern arising from the response.
2	Satisfactory	A broad response with an adequate level of information provided that is relevant and the response provides the evaluation panel with at least a good level of confidence that the bidder will be able to meet the requirements of the project if appointed with no more than minor reservations or concerns arising from the response.
1	Poor	The response is limited and lacking in relation to a large proportion of material elements and leaves the evaluation panel with significant reservations or concerns around the ability of the bidder to meet the requirements of the project if appointed.
0	Unacceptable	No response or extremely limited response that does not suggest that the bidder has the ability to meet the requirements of the project if appointed.

In assessing your experience and approach we will take account of your track-record and proposed approach regarding equality, diversity and inclusion, sustainability and social impact.

Sections included in tenders as set out above, have been allocated a weighting which will be applied to the scores as follows:

Section	Weighting (%)
People	20%
Experience	30%
Approach	30%
Cost	20%

There is a maximum budget for this project of £12,000 including all expenses (excluding VAT).

The Network does not necessarily want, and is not required, to appoint the cheapest bid but needs to include price within the evaluation to ensure a robust process and evidence of pursuing value for money through procurement. The Network will not cover costs associated with preparation of tender materials.

The cost element of the bids will be scored with the lowest bid scoring 4 and the scores of other bids will be calculated on the basis of:

lowest bid/other bid x 4

Therefore if Firm A's bid was the lowest tender at £10,000 and Firm B bid £11,500

Firm A would score 4 and Firm B would score 3.48.