

Essential Networks project

Invitation to tender for a Digital Development Consultant

1 Summary

Heritage Trust Network seeks to appoint a consultant to help us review our digital infrastructure, practice and strategy. The consultant will be expected to work with the Chief Executive, Programme Manager, Membership Officer, other staff and trustees and representatives of our membership to review how we use our digital systems for internal and external organisation and communications, data processing and service delivery. The result of the consultancy is expected to be proposals for immediate ‘quick-win’ changes as well as a strategy for our digital development over the next five years.

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. During 2023 we will be implementing the development phase of Essential Networks, before applying for the delivery phase in May 2024, to begin later that year. During this development phase we will be working with a Network Development Group – a ‘focus group’ of members to inform the project’s work and give feedback on proposed activities and changes.

During the past three years the Network has undergone a digital transformation largely supported by our Unlocking the Power of Communities, National Lottery Heritage Fund project. This has included development of a CRM using Salesforce. The CRM currently holds all our data on external contacts, including membership records. It processes our membership renewals, records our casework with members, produces reports on membership and casework and is used as part of our communications to send list emails to members and others. Integration of the CRM with our booking system for events has been a challenge and work on this may still be progressing during the period of this consultancy.

We have also developed an online community, branded as the ‘Network Hub’, using Salesforce. The online community enables discussion between our members, allows them to edit their entry in our member directory and to post support requests. Uptake of the online community by members has been less than was hoped for.

The Unlocking the Power of Communities delivery plan included piloting ‘webinars’ as part of our offer to members, but when the first Covid lockdowns were imposed the Network quickly moved to delivering events online. After experimenting with Goto Meeting, we now use Zoom for all external events and Teams for internal meetings.

Our existing WordPress based website is not sufficiently flexible to allow for new activities and projects to be incorporated and it is planned to replace it towards the end of the development phase project. Supporting us to develop a brief for a designer/developer for the new website will be part of this consultancy. In 2021 we commissioned an accessibility audit for our website. We were able to implement most of its recommendations. A new website should be in line with best practice regarding accessibility.

Within our existing website is Toolkit, our online knowledge-hub for members. Currently members require a login to access Toolkit, and this is separate from the Network Hub login. Having two logins causes additional work and confusion. It had been our intention as part of Unlocking the Power of Communities to develop a new home for Toolkit (perhaps using Salesforce Knowledge) but this has not proved possible yet. There are currently challenges around the capacity required to keep Toolkit updated.

In 2020 we agreed to standardise our email, officer software and file storage using Microsoft 365, including the Office suite and SharePoint.

We use a variety of other platforms including Mailchimp for e-Newsletters, Eventbrite for event bookings, and Form Assembly for forms (particularly those that input to the CRM). A full list will be provided to the successful consultant.

3 Objective

The objective of the consultancy is to review all the digital technologies we use, how they are configured, how we use them and how they integrate with each other, and to develop proposals for immediate improvements and a costed plan for longer term developments to be included in the Essential Networks delivery phase proposal.

We are seeking to develop technologies and ways of using them that:

- facilitate our efficient operation,
- are simple and user-friendly for staff, members, other customers and contacts to use,
- are accessible,
- are easy for staff to learn and use
- are integrated to reduce duplication of data entry and analysis,
- allow trustees and other volunteers appropriate levels of access to view and input data, and analytics where possible
- do not involve excessive ongoing costs or dependence on external support,
- enable the production of appropriate reports (particularly tracking member engagement),
- comply with data-privacy and other relevant laws and regulations such as the Data Protection Act and UK GDPR (note that most of our activity is business-to-business).

4 Scope of services

The work required is to:

- Review Heritage Trust Network's approach and strategy regarding digital technology.
- Review in consultation with staff, trustees, volunteers and members, all digital technologies used by Heritage Trust Network to carry out its work, including how they are configured and used.

- Facilitate and inform a discussion with staff, trustees, volunteers and members on the scope for digital innovation to increase the capacity of the Network to help its members succeed.
- Develop proposals for improvements to the technologies and how they are configured and used, that can be implemented before the end of 2023.
- Draft a costed strategy for the longer term development of digital within the Network that can be included in the Essential Networks delivery stage application.
- Ensure that accessibility best practice is achieved in all the Network's digital communications including the new website.

Specific work to be undertaken or issues to be addressed as part of the above include:

- Where 'Toolkit' is to be hosted in future, avoiding members requiring two log-ins.
- The commissioning of a new website. The Consultant will be expected to have a substantial input (with the staff and Communications Consultant) to the brief for the website and to support the staff team with any issues arising during its implementation.
- A review of the Network's privacy policy (and guidance on its implementation).
- The future of discussion forums within the Network Hub.
- Implementation of an 'Impact Survey' of members (a pilot sample survey is planned as part of the Essential Networks development phase).
- Technical issues regarding the impact and reach of communications (e.g. avoiding emails going to junk, ensuring maximum reach for social media posts, etc).
- Making our analytics, regarding media reach, project progress and member engagement, more effective and easier to use.
- Reviewing and scoping digital systems for administration of a community grants programme in the delivery phase of the project. These will be small grants we will be giving to our member organisations. The system will have to track the application process and grant administration including storing proof of expenditure and payments.

Note the above is not an inclusive list and we expect further specific issues to be identified as part of the initial scoping phase of the consultancy.

The appointed consultant will have to work with the Marketing and Communications Consultant. There is some overlap, and an early meeting will be needed to clarify how the scope of the two briefs will be differentiated. We are open to the two assignments being delivered by the same person/firm (see 8 below).

5 What are we looking for?

We are looking for a consultant who has:

- Wide-ranging knowledge and experience of the application of digital technologies within small or medium sized charities.
- A track record of facilitating positive change in organisations.
- Experience of working with membership organisations.
- Experience of Salesforce within a not-for-profit organisation.
- Understanding of, and commitment to, inclusion and accessibility in digital
- A commitment to a co-design practice, working collaboratively with our team and our members, and enabling our staff, trustees and other volunteers to learn from the process.

We are more interested in the quality of the process than the quantity of pages in the final report.

Note that while specific technical knowledge will be helpful, there is a separate budget available to commission technical support. We currently have a provider of technical support with our CRM that we are happy with and wish to continue to use. Technical support for other aspects of our work can be commissioned as required.

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 February 2023 and January 2024 according to the following timetable. Generally throughout this period the consultant should be available to support staff to implement changes and discuss any challenges or innovations that arise.

February – March 2023	Review progress on digital development and consult with staff team, trustees, members and partners. We have identified 6 th – 9 th March as time when we may have staff ‘working together days’ and an in-person workshop could be scheduled. Specifically: review Toolkit – initial discussion and review of similar resource hubs
By 12 th April	Brief progress report and initial proposals (in order to report to Board Meeting on 20 th April).
April	Consult with Network Development Group on Toolkit
	Review performance of Network Hub, research online communities, consult with staff team.
May	Draft and present plan for Toolkit location and sustainability
	Consult with Network Development Group on Network Hub
June	Draft and present proposals for improvement of Network Hub
June – July	Support any commissioning and facilitate technical set up of new home for Toolkit (if this is required and feasible)
July – August	Oversee implementation of any changes to Network Hub
August – October	Oversee Toolkit content migration
Oct - November	Consult with staff, trustees and Network Development Group on longer term digital strategy
Nov - December	Draw up digital development plan
January 2024	Support CEO to incorporate digital development plan into Delivery Phase application.

7 Budget

The maximum budget for this work is £14,000 excluding VAT and including any expenses (you should include the cost of travelling to at least two in-person events which will be held in reasonably accessible locations). Payment terms will be agreed on appointment.

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 13 th February	Interviews
17 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 £14,000 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 elements 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:

$\text{lowest bid/other bid} \times 4$

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.