

Essential Networks project

Invitation to tender for Events and Partnership Associate

1 Summary

Heritage Trust Network seeks to appoint an entrepreneurial individual, familiar with the heritage sector to carry out a market testing assignment 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 deliver a number of fee-earning events, promote Partner (i.e. business) membership of the Network and increase sponsorship income. The intention is to increase our financial resilience (a project outcome) and sustainability, whilst serving and supporting our members.

This commission will be delivered alongside our Business Development Consultant commission and the person appointed will be expected to work closely with that Consultant.

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 project. We have tested the idea of running panel-based strategic reviews for our members. One such review has taken place and was successful. We currently have 23 Partner (i.e. business) members and 2 Partner Plus members (paying a higher fee). We receive a modest amount of sponsorship income for our annual Conference.

We are currently working on a new programme of events on the theme of heritage-led high-street/town centre regeneration which will be a successor to our Open High Streets contract but earn a higher proportion of its income from ticket sales. Managing this programme would be part of this commission.

3 Objective

The objective of the assignment is to demonstrate, by testing the market, that the Network can increase its earned income by building on its existing strengths of event management and providing opportunities for businesses to promote themselves to the heritage sector.

4 Scope of services

The work required is as follows:

1. Delivering a programme of High Street events

Organising the proposed programme of events around the theme of heritage led town centre regeneration. The programme is currently proposed to consist of 4 or 5 in-person, one-day conferences and six short online events. The audience for these events will be local authority officers, staff from regeneration partnerships (such as Business Improvement Districts), Government Heritage Agencies, professional advisors, contractors and consultants, community heritage organisations and other not-for-profit organisations providing business space and employment services, arts activities and housing. This programme is currently being developed in co-operation with partner organisations and the person appointed would pick up and complete that development and, working with the Network's staff team:

- Find venues for and organise in-person events, including tours and site visits, refreshments and technology
- Secure speakers/facilitators
- Set up and deliver online events
- Produce promotional copy and promote the events
- Manage bookings using the Network's systems
- Organise and analyse delegate feedback

2. Explore other opportunities for income-earning events

Working with the business development consultant, develop new ideas for income earning events, conferences, 'trade-fairs' etc. If time allows, market test these ideas.

3. Recruiting more Partner members to the Network and retain existing ones

Review the existing Partner membership of the Network and the extent to which they have engaged with the Network and its membership. Contact Partner members with low levels of engagement to facilitate greater involvement and ensure they renew their memberships. Work with the staff team to develop new ways in which Partner members can engage.

Research potential Partner members for Heritage Trust Network and promote the benefits of membership to them through emails, social media, online events and direct contact.

4. Grow the Network's income from sponsorship

Review the Sponsorship that has been achieved for Network annual conferences. Review Network activities to identify other areas where sponsorship could be secured. Promote sponsorship opportunities to Partner members and other businesses serving the heritage sector. Work closely with the Conference Organiser to ensure that you are not competing for sponsorship opportunities.

5. Report

Produce a brief report at the end of the assignment outlining achievements, lessons learnt and prospects for further development of the above income streams.

All the above activity should be carried out and recorded using the Network's agreed systems and in accordance with our data handling procedures.

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
- Events management experience, preferably in a commercial context.
- Experience of securing sponsorship for events and other activities.
- Creativity and entrepreneurial flair
- Excellent interpersonal skills, including the ability to articulate the Network's unique selling points

If the appointed person preferred, we would consider offering this as a temporary part-time employment contract and paying via PAYE.

6 Timetable

The work should be completed between March and November 2023.

The events programme should be started as soon as possible and delivered by the end of October. An interim report on the other opportunities (items 2-4 in section 4 above) should be completed by the end of June to present to our July Board meeting.

7 Budget

The maximum budget for this work is £12,000 plus VAT including all fees, expenses and materials, but not the cost of delivering events or producing marketing materials which is budgeted for separately. 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 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 £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 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:

lowest bid/other bid x 4

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

A would score 4 and B would score 3.48.