

# Invitation to tender for Conference Organiser

## 1 Summary

Heritage Trust Network seeks to appoint, on a freelance basis, an entrepreneurial individual, familiar with the heritage sector and experienced in event management, to organise our 2023 annual Conference. The appointed associate will work closely with the staff team to deliver all aspects of conference organisation including liaising with the venue(s), programme development, securing speakers, facilitators and tour leaders, marketing and communication with delegates.

## 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.

Our conference is the highlight of our year and a major event in the heritage sector calendar. It has its own particular character of informality, celebration and inspiration, being likened to a heritage family reunion. It provides opportunity to showcase member successes, celebrate culture and support heritage regeneration at the venue locations. The conference has been regularly remarked on as an excellent networking opportunity.

We held an online-only conference during the lockdown of 2020. We have subsequently held conferences which include an online day and two in-person days approximately a week later. The 2021 conference was held in Coventry with 74 people attending the online day and 90 attending the in-person days. In 2022 in Caernarfon 100 people attended the online day and 120 in person. Numbers at Caernarfon were restricted by the venue size and there is evidence that we could have sold more tickets. A copy of the 2023 programme is attached.

For the past four years the conference has been financially supported by a mix of ticket sales, sponsorship (including sponsorship from our long-term partners, the Architectural Heritage Fund), and subsidy via grant-aided projects. From 2023 we can no longer rely on direct grant support to conference. Financial viability, and our ambition to engage with more people in the sector, therefore require that we increase the number of people attending conference. We aim to allow for up to 250 in-person delegates but target a minimum of 200. While seeking a financially viable conference, the Network's trustees recognise that we are testing the market and therefore taking a risk which could require falling back on reserves.

In previous years, conference has been organised by one member of staff, with support from local partners, the wider staff team and a trustee working group. Due to the scale of the event and desire to expand it, we require more resource to achieve a smooth and successful conference, while aiming to retain the same inspirational character.

The 2023 conference will be held in Newcastle.

Conference has previously been held in November, but we are open to holding it earlier in the year (late September at the earliest) to reduce the risk of poor weather.

### 3 Objective

The objective of this commission is to organise a successful Heritage Trust Network conference in 2023. It will be considered to be a success if...

- At least 200 in-person delegates attend.
- The event breaks even financially (preferably making a surplus).
- Sponsorship income increases on previous years.
- The conference helps the Network to further engage with both key stakeholders and new communities.
- Delegate feedback is overwhelmingly positive and they are delighted with all aspects of the conference.
- The conference retains its existing friendly and inspiring character.

### 4 Scope of services

The work required is as follows:

- Locate a suitable venue and report back to the Chief Executive and Chair.
- Research potential dates for the conference avoiding half-term holidays in each of the UK nations and clashes with other events which might attract similar audiences.
- Liaise with the venue and caterers, and agree dates, our requirements and prices.
- Convene a conference working group of staff, trustees and member volunteers (from the location city). Convene regular online meetings of the group to get suggestions and feedback on the programme.
- Draw up a promotional plan for the conference, including the development of event branding.
- Develop a conference programme, recruit speakers, facilitators, tour leaders and entertainers.
- Draw up an exhibitor/sponsorship package and promote it to previous sponsors, existing Partner members and the wider heritage business community. Agree exhibitor/sponsorship deals.
- Research and secure locations for tours, visits and conference dinners.
- Agree pricing with the Chief Executive and list the conference on Eventbrite. Including the ongoing management of ticket sales. By the time tickets go on sale we expect to have our Customer Relationship Management (CRM) system integrated with Eventbrite and able to produce reports on Conference ticket sales.
- Develop the conference page on the Network website and ensure delegates have the information they require to make informed choices about accommodation, travel, etc.
- Liaise with speakers, facilitators and tour leaders to ensure they have agreed to contribute and are appropriately briefed.
- Recruit a photographer and videographer for the event as required.
- Prepare regular reports for the staff team, conference working group and board.
- Communicate with delegates and deal with any issues they raise.
- Monitor costs and manage the event budget.

- Present a final feedback / evaluation report for HTN Management Team & Board.
- Secure any other elements required to make the event a success.

## 5 What are we looking for?

We are looking for a consultant who can help us build on the success of our conferences and all we have learnt from them, but who can also challenge us with new insights from their previous experience. The appointed consultant should have:

- Experience in managing events of this scale.
- An understanding of the heritage sector and in particular the part of the sector represented by Heritage Trust Network members.
- Good communication skills, including the ability to write persuasive copy.
- Understanding of, and commitment to, diversity, inclusion and accessibility
- A commitment to a co-design practice, working collaboratively with our team and our members, and enabling our staff, trustees and other volunteers

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

## 6 Timetable

The consultant is expected to commence work as soon as possible after appointment (February 2023) and the work should be completed with a final report no more than four weeks after the conference (October – December).

Indicative timetable

February 2023	Appointment and inception meeting
March 2023	Conference working group established Main venue and conference dates agreed Promotional plan developed
April 2023	Outline programme agreed Target speakers agreed Pricing agreed Event branding developed
May 2023	Initial conference information posted Ticket sales open
June	80% of speakers, facilitators, tour leaders and entertainers agreed confirmed Secondary venues agreed
Two months prior to conference	All speakers, workshop leaders, tours, entertainment, meals and costs agreed Full conference information posted online

One month prior to conference	Printing of programmes All logistical arrangements agreed
Late September – mid November	Conference
Once month after conference	Report on attendance, delegate feedback, successes, issues, lessons learnt.

## 7 Budget

The maximum budget for fees for this work is £12,000 including VAT (if charged). Expenses will be paid for two reconnaissance visits to the conference venue/city and for attending the conference itself. 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](mailto:david.tittle@heritagetrustnetwork.org.uk) by midday on 6<sup>th</sup> 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](mailto: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 <sup>th</sup> December 2022	Early notification of opportunity (expressions of interest requested)
13 <sup>th</sup> January 2023	Invitation to tender advertised
Midday 6 <sup>th</sup> February	Deadline for submissions
w/c 20 <sup>th</sup> February	Interviews
24 <sup>th</sup> 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 and VAT (if charged).

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 A's bid was the lowest tender at £9,000 and B's bid £10,000

A would score 4 and B would score 3.6.