



Sefton CVS

Heritage Project – Hearts of Gold Sefton at 50

Project Evaluation Services

Invitation to Quote Specification

Registered in England and Wales as a Company
Limited by Guarantee No: 2832920

Registered Charity No: 1024546



INTRODUCTION

Sefton CVS invites suitably qualified and experienced applicants to provide a quotation for professional evaluation services to conduct a project evaluation for their new Project 'Hearts of Gold - Sefton At 50'.

1 OVERVIEW

The main details of the project are:

Project Name:	Hearts of Gold – Sefton at 50
Geographical Area:	Sefton Metropolitan Borough
Funder:	National Lottery Heritage Fund (NLHF)
Project timescales:	June 2023 – June 2025
Evaluation Contract:	August 2023 – June 2025
Contract Value:	Maximum of £10,000, <u>inclusive of VAT, where applicable</u>

1.1 PROJECT SUMMARY

The two-year project will engage and involve communities to celebrate Sefton's people and places, with the borough's golden anniversary (1974-2024) the focus for an activity programme particularly raising social and cultural heritage awareness. Led by a Heritage Development Officer, our project will create a gateway for increased recognition of community heritage and more inclusive contributions borough-wide, concluding with activity to support Sefton's Borough of Culture 2025.

Locality based research

We will recruit volunteers, promoting voluntary group engagement, participation and co-ordination through a series of locality-based (North, Central and South Sefton) workshops. Work will research key themes: the people, places and events important to successive generations, and influential in shaping Sefton's identity since 1974.

The Officer will deliver a series of training workshops for volunteers, including representatives from local community-based organisations, supported by the Heritage Toolkit derived from the 'Community within Communities' (CwC) project. We will engage with individual volunteers and established community and public organisations to review and research their own history, and support a celebration of community heritage over the past five decades, with particular attention to three themes:

- **Hidden Heroes:** people who have influenced and shaped the borough, its communities and neighbourhoods. The inspiration for the ‘Hearts of Gold’ theme, these will include founding members of local charities and other loved and respected local institutions.
- **Special Places:** including buildings and spaces that have become part of the local landscape and Sefton landmarks - from the restored Southport Pier to the iconic Gormley Statues.
- **Memorable Events:** from local galas, fairs, Royal Visits and celebrations to international occasions, including sport, art and culture, in town, coast and country locations.

Trails, exhibition and commemoration

From this research, 3 locality-based trails, each comprising 25 plaques with digital trail guides, will be prepared to cover North, Central and South Sefton with a borough-wide booklet, and exhibition, showcasing Sefton’s diverse heritage, 1974-2024. This pool of 75 items will be provide a shortlist for a public vote to identify ‘Sefton’s Golden 50’ – a blend of 50 people, places and events from Sefton’s first 50 years.

Community grants

Two rounds of Community Grants Programmes will provide additional opportunities for group engagement and involvement in heritage training, events and projects, with group development support including building capacity, volunteer support, and bespoke guidance to develop their ideas. These programmes will be themed to (1) commemorate/ celebrate and then (2) look ahead, to new projects following the golden anniversary. On completion of each programme a celebration event will share the achievements and legacy from the grants.

Heritage Project Progression

The project will culminate with a series of ‘heritage project development surgeries’, including training in finding funding, bid writing, project evaluation and volunteer coordination specifically aimed to prepare and deliver 20 additional heritage community projects.

Key Project Outcomes

Key Outcome	Indicator of Change
A wider range of people will be involved in Heritage	This will be evidenced through our operational activity work with young people and families, women’s groups, diverse ethnic backgrounds, refugees and asylum seekers and veterans, for example. We wish to demonstrate that our project themes are accessible to all, irrespective of age, ability, location or background.

	<p>We want to show how groups involved in our project explore their organisation’s heritage and engage their own members and community, so that heritage helps them to identify new approaches for service delivery.</p> <p>Key indicators for us will include the assessment of the efficacy of the heritage grants, the trails and in particular the public vote to decide ‘Sefton’s Golden 50’ and the sense of public ownership that follows.</p>
Heritage will be identified and explained	<p>This will be evidenced through the project success in raising awareness to all of the 50th anniversary of the borough of Sefton.</p> <p>A major ambition of this project is to research and promote forgotten or ‘hidden heroes’, creating important social connection with the local heritage which has been influential in shaping local neighbourhoods. In addition to researching key individuals, we will include workshop sessions working with representatives from local communities and VCF organisations to support them to research and share their own origins and heritage.</p> <p>Alongside this ‘hidden heroes’ theme volunteers will further work on a locality level (three groups, covering north, central and south Sefton) to also research those places and occasions prominent in the timeline of Sefton borough, locations and events which have melded the borough heritage identity.</p>
People will have developed skills	<p>This will be evidenced by the following indicators -</p> <ul style="list-style-type: none"> - Locality based workshops for volunteers to develop their research about key people, places and events. - A structured Capacity Building Training Programme. Community grant projects a focus to design, develop and deliver heritage activities to a wide range of teams, volunteers, participants and audiences (new and existing across all categories). - Heritage Project Development Surgeries to support new project bids.

	<p>Our aim is to match or improve on the reported skills outcomes from our previous heritage project volunteers. They have previously reported new or improved specific heritage based skills including heritage research; oral history interviewing techniques, project management skills, such as personal development/transferable skills including communication skills, improved team working, problem solving, and other organisational skills such as project design, grant bid writing, impact measurement.</p> <p>We will explore skills accreditation options and develop our monitoring and evaluation approaches and guidance with community grantees to progress their impact measurement skills, enabling them to better assess the difference they make to their own organisation, participants and audiences.</p>
<p>People will have learned about Heritage</p>	<p>This will be evidenced by engagement, research and project promotion and how Sefton CVS links those already actively involved in positive heritage activity, through important voluntary mentors and champions to offer encouragement and peer support.</p> <p>Our attention to ‘hidden heroes’ aims to show how locally people can, and have, made a difference and how what was once community action is now social and cultural heritage.</p> <p>We wish to show how this theme is designed to inspire today’s generations to reflect on those predecessors, and show the importance of actions – both for local heritage and their communities. In particular we wish to show how Sefton CVS acts as a catalyst for other VCF charities and community groups to research their own heritage – their origins and development, issues and impact to map out the story of the borough’s community sector and its ‘hearts of gold’ influential in shaping the borough and it’s communities.</p>

Key Indicators from the Project Plan

- Number of volunteers recruited across the whole project with an agreed target with the NLHF
- Planning and delivery of training sessions across the two year project and their impact in building group capacity.
- Successful delivery of two community heritage grant programmes. Key indicators will include the diversity and vibrancy of the projects delivered and the outcomes they achieve.
- The design, development and delivery of three trails to be situated in North, Central and South Sefton. Each Trail will have 25 points identified on it and showcase a range of hidden heroes, places and events.
- Successful delivery of Trail exhibition tour with multiple members and target attendance for visitors agreed.
- Successful delivery of two celebration and engagement events in Sefton to highlight Sefton at 50 and our hidden heroes.

EVALUATION REQUIREMENTS

TERMS OF REFERENCE

The purpose of this piece of work is to evaluate the effectiveness, impact and value for money of the project and its delivery model from the perspective of participants, partners and other stakeholders. Judgements are to be based on project activities defined by inputs, processes, outputs and outcomes achieved throughout the lifetime of the project. Where appropriate, reference should be made to demographic and benchmark data.

SCOPE OF EVALUATION

The appointed Evaluator is required to:

Conduct independent research to provide a summative report for the entire project, leading to evidenced recommendations and conclusions that provide a springboard for the development of future delivery plans and potential new projects.

Qualitative methods

Research should be tailored to encourage open and honest communication and feedback from contributors, such as, participants, volunteers, delivery and strategic partners.

Particular emphasis should be paid to gather the reflections and thoughts of participants, partners and volunteers in a way that captures their 'voices' and influences recommendations for future developments, both within our project and in relation to other future applications.

1.1.1 Quantitative methods

The appointed Evaluator will be provided with project management information for interpretation and analysis in reference to relevant demographic and benchmark data, as appropriate.

1.1.2 Key Areas for Analysis

The evaluation should focus on a number of key questions – examples of which are listed here;

- What impact did the project have on the community groups? In particular did groups experience an increase in capacity and success rate in delivering further Heritage Projects?
- What impact did the project have on the volunteers who participated?
- What impact did the project have on the wider community in their awareness and acknowledgement of local heritage?
- What wider outcomes did the project achieve and were these in line with the application proposal?
- How did the project contribute to the key themes of Equality & Diversity, Gender Equality and Sustainable Development?
- How effective was the delivery model could it be improved and if so, how?
- Were there any barriers to project success, if so, how did it overcome them and adapt?
- Did the project achieve its stated outcomes? If so, how and why? If not, why not?
- What should we learn-from the project to inform future strategy and delivery models?

The author(s) will be named on the report; Sefton CVS will have overall editorial responsibility and discretion to publish the report.

The successful applicant will be expected to attend periodic meetings with Sefton CVS, both at its premises and those of its project partners. Where practical, online meetings will be used to reduce environmental impact and enable cost efficiencies.

Unless otherwise agreed with the Project Manager, it is not expected that Sefton CVS will provide facilities, accommodation, IT or research resources to the appointed supplier.

The expected duration of the evaluation contract is five months from contract award.

1.1.3 Report Submission Timetable

Description	Date
First Progress Report <i>Brief summary of current findings and planned research activities</i>	June 2024
Second Progress Report <i>Brief summary of current findings and planned research activities</i>	April 2025
Evaluation Report (Draft)	May 2025
Evaluation Report (Final)	June 2025

Conflicts of Interest

Sefton CVS has a duty to ensure no conflicts of interest arise in the award of this contract or the evaluation of the project.

Quotations/ applications cannot be accepted from any person or organisation deemed to be directly or indirectly involved with Sefton CVS or delivery of the project. This includes but is not limited to:

- Delivery partners holding a Service Level Agreement with Sefton CVS for the delivery of project services (currently or previously).

This includes paid staff, Directors and unpaid Trustees/ Directors of the above organisations.

If interested applicants are in any doubt as to whether they have a potential conflict of interest, they should declare this in their quotation document.

2 ASSESSMENT/ SELECTION PROCESS AND CRITERIA

2.1 ASSESSMENT PROCESS

Sefton CVS will run this competitive procurement process in an open and transparent manner and ensure equal treatment of applicants in the process.

Decisions will be made on the basis of the stated criteria of price; competency and track record; credibility of the proposal; knowledge/understanding of the subject area; and social value measures.

Applicants must respond to **all** questions set out in this section.

Shortlisted applicants will be invited to attend an interview to present and discuss their proposal.

Two professional references will also be required from short-listed applicants.

2.2 APPLICATION REQUIREMENTS AND SELECTION CRITERIA

Quotation responses will be assessed against the selection criteria listed below.

Your response must include:

- Name(s) and contact details of you, or your organisation, including legal status;
- Detailed responses to the specific questions below.

Criteria	Weighting
1. Price, including relevance and reasonableness of proposed costs.	35%
<ul style="list-style-type: none">• <i>Please provide a detailed breakdown of your proposed fees and pricing structure including a breakdown of individual, named staff involved (including hourly/daily rates and number of hours/days), other direct costs and overheads associated with this piece of work.</i> <p><i>Please note, the price (£) cannot exceed £10,000, inclusive of VAT, if applicable.</i></p>	
2. Competency and track record. Soundness and credibility of proposal.	30%
<p><i>Please provide details of:</i></p> <ul style="list-style-type: none">• <i>Named evaluation and other staff, including qualifications and experience;</i><ul style="list-style-type: none">○ <i>Indicate which team member will lead on specific aspects of the work</i>• <i>Relevant, recent experience in evaluation of arts or heritage projects</i>• <i>Experience of the National Lottery Heritage Fund</i>• <i>Proposed evaluation methodology and key activities;</i>• <i>How you will gather the reflections and thoughts of participants, community groups and volunteers in a way that captures their 'voices' and influences recommendations for future developments;</i>• <i>Proposed innovative approaches to evaluation of the project, including involvement of the wider partnership in the evaluation process;</i>• <i>Experience of innovative approaches used in other evaluation projects.</i>	

<ul style="list-style-type: none"> Proposed timetable of activities. 	
3. Knowledge and understanding of Heritage Projects	25%
<ul style="list-style-type: none"> Please demonstrate your knowledge and understanding of Heritage projects and funding, including its impact on the wider community 	
4. Social Value measures	10%
Please provide details of: <ul style="list-style-type: none"> How your business supports the LCR economy (e.g. employment, local suppliers, etc.) What actions you take to reduce environmental impacts (e.g. travel, waste, energy consumption) 	
5. Conflicts of Interest	Not scored
<ul style="list-style-type: none"> Please confirm if you are aware of any potential or actual conflicts of interest that may prevent you from working with Sefton CVS on this project. If you are in any doubt as to whether a conflict of interest may exist, please provide details. 	

2.3 SCORING METHODOLOGY

The following scoring methodology will be applied to the assessment of all responses.

Score	Comment
1-3	Response provides a poor/weak level of confidence in the applicant's ability to meet the requirements, or is deemed to provide poor value for money.
4-6	Response provides a moderate-good level of confidence in the applicant's ability to meet the requirements, or is deemed to provide moderate value for money.
7-8	Response provides a very good level of confidence in the applicant's ability to meet the requirements, or is deemed to provide good value for money.
9-10	Response provides a high level of confidence in the applicant's ability to meet the requirements, or is deemed to provide excellent value for money.

3 CONTRACT VALUE AND PAYMENTS

The maximum value of this contract is £10,000 inclusive of VAT. Applications exceeding this amount will not be considered.

Payments will be made in accordance with the following payment schedule; subject to potential negotiation and agreement of an alternative approach.

Payment Schedule		
Description	Amount	Date
1 st Progress Report <i>Brief summary of current findings and planned activities</i>	20%	June 2024 <i>following receipt of progress report</i>
2 nd Progress Report <i>Brief summary of current findings and planned activities</i>	30%	April 2025 <i>following receipt of progress report</i>
Evaluation Report (Draft) <i>For discussion and review</i>	40%	May 2025 <i>following receipt of draft report</i>
Evaluation Report (Final)	10%	June 2025 <i>following receipt of final report</i>

4 CONTRACT AWARD MILESTONES AND HOW TO APPLY

Milestone	When
Invitation to Quote published & circulated to prospective suppliers	June 20 th 2023
Deadline for queries/ clarifications	5pm (GMT), June 29 th
Quotation/Application Deadline	5pm, Friday 7th July
Invitation to Interview sent to shortlisted applicant(s)	10 th July
Interview - shortlisted applicant(s) <i>To take place at Sefton CVS offices, Burlington House, Waterloo, L22 0LG</i>	Thursday 20th July
Contract Award Notification	21 st July
Contract Commencement	As soon as possible after award notification, but no later than Monday 7th August 2023

Applications must be in English. The entire application, including any supporting documentation, should be e-mailed **no later than 7th July** to: groupdevelopment@seftoncvcs.org.uk

If you have a specific question relating to this Invitation to Quote not answered in this specification document, please email groupdevelopment@seftoncvcs.org.uk before 29th June. We will endeavour to respond to queries within 2 working days.

5 TERMS AND CONDITIONS

This section outlines the terms and conditions that will govern your submission of a quote to Sefton CVS. You are advised to read this section carefully, together with the rest of this document before submitting a response. **By submitting a quotation, you accept these terms and conditions and you agree to abide by them.**

5.1 SUBMITTING A QUOTATION

By submitting a quotation, you confirm that:

1. You have no actual or potential conflict of interest with Sefton CVS (including its Trustees, officers or employees. If at any time during the process you discover an actual or potential conflict of interest, please promptly inform Sefton CVS.
2. You have legal capacity to submit a quotation / application in response to this Invitation to Quote (ITQ) and are acting lawfully, ethically and in good faith in your dealings with Sefton CVS;
3. All information contained in your quotation response is true, accurate and not misleading;
4. You have sufficient time, skills, experience and resources to carry out the services to the highest professional standards expected of a competent supplier of the required services and are able to obtain all necessary rights, licences, consents, waivers, approvals, permissions, permits, certificates and insurances necessary to provide the services to Sefton CVS;
5. Your quotation will remain open for acceptance for a period of 60 days from the Quotation/ Application deadline;
6. Sefton CVS may share your quotation response with any third party as Sefton CVS, in its absolute discretion, deems necessary for the purpose of evaluation.

5.2 COMPLIANCE

Sefton CVS reserves the right to reject or disqualify your quotation response where:

1. You fail to comply with the requirements of this ITQ (including but not limited to these terms and conditions), your application is incomplete, or you are guilty of a serious misrepresentation in supplying information in response to this ITQ;

2. Your application is received after the deadline set out in this ITQ. Sefton CVS will not consider any requests for an extension of the Quotation/ Application deadline specified within this ITQ document;
3. You do not have the economic and financial standing and/ or the technical and professional ability to carry out the required services outlined in this ITQ;
4. There is a change in your identity, control, financial standing or any other factor impacting on the selection and/or evaluation of your quotation response;
5. You are or become insolvent or have a petition issued against you;
6. You are suspected either directly or indirectly of behaving in a collusive, canvassing, or anti-competitive manner or you offer or accept an inducement or reward in order to gain a commercial, contractual, regulatory or personal advantage; and/or
7. You (or if you are a commercial entity, a director or person who has the power of control or power to make representations or decisions on your behalf) have committed any offence relating to conspiracy, corruption, bribery, fraud, money laundering or any other criminal offence related to your course of business or profession.

Sefton CVS reserves the right, in its absolute discretion, to:

8. Refuse any quotation submitted, including any quotation that is valid for any period shorter than 60 days from the Quotation/ Application deadline;
9. Disqualify any potential applicant who has been convicted of any of the offences listed at Regulation 23(1) of the Public Contracts Regulations 2006 (as amended);
10. Extend the Quotation/ Application deadline. In such circumstances Sefton CVS will endeavour to notify all invited applicants of any change;
11. Amend any aspect of this ITQ (including, but not limited to the evaluation criteria and the timeline), or cease the process at any time;
12. Limit the number of applicants invited to participate in any follow-up interview or other activity, or to dispense with any follow-up activity altogether;
13. Require that you clarify your application in writing and/or provide additional information and/or adequate references to Sefton CVS' satisfaction. A failure to respond adequately may result in you not being selected.

5.3 APPLICANT RESPONSIBILITIES

1. You shall be responsible for all of your own costs, expenses and/or losses that may be incurred in relation to the preparation of your application, attendance at follow-up interview or participation in any other similar follow-up activity.

2. You shall, at all times, treat the contents of Sefton CVS documentation as confidential, as well as any information regarding Sefton CVS imparted to you by any other means, and only disclose such information as may be necessary for the preparation of a compliant quotation response.
3. You shall not, before the Quotation/ Application deadline specified within this ITQ specification, disclose to any person the price or detail of your quotation to Sefton CVS, except where the disclosure in confidence is necessary to obtain insurance premiums or guarantees required as part of the quotation.
4. Any contract entered into as a result of this ITQ will be on Sefton CVS' standard terms and conditions, subject to the appointed supplier's compliance with:
 - a. Sefton CVS' Due Diligence requirements;
 - b. Relevant policies, procedures and protocols, including but not limited to Information Governance (data protection/ security), Confidentiality, Copyright & Intellectual Property Rights;
 - c. Conflict of Interest Declaration.

5.4 INTELLECTUAL PROPERTY

1. All intellectual property rights in this ITQ and all materials provided by Sefton CVS, or any third party acting on its behalf, shall remain the property of Sefton CVS.
2. Any intellectual property arising out of the provision of the services specified in this ITQ shall belong absolutely and exclusively to Sefton CVS.
3. You warrant to Sefton CVS that to the best of your knowledge and belief, all works and services proposed in this quotation will not infringe, in whole or in part, any copyright or any other intellectual property right of any person.

5.5 WARNINGS/ DISCLAIMERS

1. Nothing contained in this ITQ specification, or any other communication made in respect of it between Sefton CVS or its representatives and any party will constitute an agreement, contract or representation between Sefton CVS and any other party.
2. For the avoidance of doubt, receipt by you of this ITQ does not imply the existence of a contract or commitment by or with Sefton CVS for any purpose.
3. The information contained in this ITQ specification does not purport to contain all the information which you may require. While Sefton CVS has taken all reasonable steps to ensure, as at the date of publication of this ITQ, that the facts contained in it are true and accurate in all material respects, Sefton CVS does not make any representation or warranty as to the accuracy or completeness or otherwise of this ITQ.
4. Sefton CVS accepts no liability to you whatsoever and however arising and whether resulting from the use of this ITQ, or any omissions from or deficiencies in it.

5.6 WAIVER

Failure or neglect by Sefton CVS to enforce, at any time, any of the provisions of these terms and conditions, shall not be construed, nor shall it be deemed to be, a waiver of our respective rights hereunder, nor in any way affect the validity of the whole or any part of this agreement, nor prejudice our respective rights to take subsequent action.

5.7 JURISDICTION

This ITQ shall be governed by and interpreted in accordance with the laws of England and Wales and subject to the exclusive jurisdiction of the English courts.