



THE WILLIAM SALT LIBRARY

STAFFORDSHIRE HISTORY CENTRE PROJECT

Staffordshire History Centre: Connecting people to collected stories and heritage of Staffordshire

Project Tender Specification Activity Programme and Active Partnership Framework Appointment Nov 2016

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1. Introduction

Staffordshire Archives and Heritage (SAH) is working in partnership (lead partner) with the William Salt Library Trust (Registered Charity no. 528570) to deliver an exciting Heritage Lottery Funded Project (HLF).

The Staffordshire History Centre Project (SHC) will connect people to the collected stories and heritage of Staffordshire, Stoke on Trent, the Midlands and beyond. We will deliver a rejuvenated, accessible and sustainable Archives and Heritage Service by preserving collections and heritage buildings currently at risk and will develop new audiences for our heritage, both online and onsite. The transformed service will provide new opportunities to volunteer and engage with collections in different ways. We will achieve this by an Active Partnership with our committed stakeholders, where they are involved at the highest level in managing the service and making decisions. We will develop a major heritage attraction for Stafford and improve the public realm of the town, capitalising on recent changes that bring more people past our front door.

2. Background and Context

The aim of the Project is to create the Staffordshire History Centre and to:

- Develop our Active Partnership further to examine how we can work together on joint fundraising, income generation, support services, advisory panels, advice services and exhibitions.
- Preserve and repurpose the grade II* listed William Salt Library (WSL) building in Stafford. Develop the ground floor of the townhouse as an integral part of SHC under a new lease. WSLT will let upper floors as offices for start-ups, freelancers and the Cottage potentially as a residential letting.
- Improve storage of “at risk” collections. Extend archive storage at a redeveloped Staffordshire Record Office (SRO) to house collections from Lichfield Record Office (LRO) and WSL. Bring paper-based and digital Museum collections such as photographs, ephemera and oral history into SHC.
- Provide bright, welcoming, new spaces for activity by volunteers, schools and for audience engagement. Create exhibition areas, refreshment areas, a shop and browsing space for the service to provide an easy entry point for new users.
- Rejuvenate our online offer and deliver more services online.
- Capitalise on the significant changes and investment of £1 billion being made in Stafford Borough and town centre by creating a much needed new heritage asset to cater for the increased population.
- Create a new public route through the area which brings potential users directly past our new, open and welcoming front door.

The total estimated project costs for the Staffordshire History Centre are £5.7m with a grant request from HLF for £4.3m. In addition there is £ 1.8m matched funding from the project partners, in-kind contributions and fundraising. For the development phase our budget totals £462,200 with confirmed development grant allocation from HLF of £333,400.

Staffordshire Archives & Heritage (SAH) includes the Archive Service, jointly funded and managed by Staffordshire County Council (SCC) and Stoke on Trent City Council, and the County Museum Service funded and managed by SCC.

SAH is a respected, experienced and established organisation with a history of saving collections and innovation in access. It has developed this with the support of organisations

including the Art Fund (Staffordshire Hoard, Minton Archive) and the HLF (Sutherland Papers, Staffordshire Appeals Project). SAH cares for around 11 million items across service points in Staffordshire and Stoke on Trent and online.

The main purpose of the SAH is to locate, collect and preserve archives relating to past and present life in Staffordshire and to make them available to the public. We manage three Record Offices (Stafford, Lichfield and Stoke on Trent), and a family and local history centre in Burton Library, and the County Museum.

The William Salt Library Trust (WSLT) was founded in 1872 to look after the collection of William Salt which focused on items about Staffordshire and its history. The object of the Charity is 'to advance the education of the public through the provision and maintenance for the purposes of study or research, of a collection of books, manuscripts, engravings, deeds, autographs and works of art relating in particular to the County of Staffordshire'. This collection is held in the WSL, Eastgate Street, Stafford immediately in front of Staffordshire Record Office (SRO).

SCC delivers the service and maintains the library building on behalf of WSLT.

3. Project Brief and Summary of Outputs: Activity Plan including consultation and evaluation, Active Partnership, Learning and schools offer

The Activity Plan proposed for the Staffordshire History Centre is based on consultation and research undertaken during 2014 to 2016 and on our experience of delivering a number of successful externally funded projects in the past. We want to take the learning from these projects and to develop a new model of working for the Service. An Outline Activity Plan was developed for the Round 1 application. Our new model will be focussed on Active Partnership as the key to involving people in the planning, development and delivery of the Staffordshire History Centre. In order to ensure the proposed activity plan is robust and fit for purpose we require a consultant to test the outline Activity Plan, undertake further research, and to develop the Plan in detail.

The consultancy will take place during the Development Stage of the project, with the potential to continue some elements of it into the Delivery Stage if the project succeeds at Round 2. The consultant will:

- Assess previous consultation undertaken for the Staffordshire History Project during 2014 and 2016.
- Undertake additional audience research, particularly with groups not yet consulted. These include schools, universities, older people and national sector organisations.
- Identify potential new audiences for the Staffordshire History Centre and its off-site activities. Work with the Business Plan consultants to identify the potential market size and demographic breakdowns of existing and new audiences.
- Establish priority audiences for the project to target.
- Explore the marketing requirements to attract and retain the audiences identified.
- Produce a detailed report on the findings of the consultation and audience research to feed into the Activity Plan.
- Test ideas in the Activity Plan and review as appropriate.
- Support the Archives & Heritage Service team to produce detailed costs for activities within the Activity Plan alongside a comprehensive Action Plan
- Develop the final four year Activity Plan in detail to ensure audience needs are met. This should conform to the HLF guidance available at <https://www.hlf.org.uk/activity-plan-guidance>
- Assist with consultation on the final design for the Staffordshire History Centre and access points in Lichfield and Burton-upon-Trent.

- Assess current evaluation data gathered by the Archive & Heritage Service team.
- Analyse data following consultation and prepare a report to inform the development of the Activity Plan.
- Identify evaluation requirements to assess the effectiveness of Activity Plan and engagement activities.
- Test ideas for gathering robust evaluation of activities and creative ways of capturing and measuring outcomes.
- Write an Evaluation Strategy for implementation in the Delivery Stage of the Project.
- Advise on implementation of the Evaluation Strategy and identify an appropriate budget.
- Analyse data following consultation and prepare a report to feed into Activity Plan.
- Provide information for the Round Two Application form particularly sections 3 and 4 by October 2017 for submission in December 2017.

Active Partnership Framework

During our research for the Staffordshire History Centre project we have piloted a method of working with our partners and stakeholders which we call 'Active Partnership'. This has been a gradual process involving existing partners, Friends groups and new stakeholders. We have worked together to produce new visions for our services and assess delivery options. We want to develop this further as a sustainable model for our service and require a consultant to:

- Review current methods of working with partners and stakeholders and assess their effectiveness.
- Develop the governance for Active Partnership and establish a framework for its implementation.
- Hold review meetings/conversations with current and potential stakeholders to assess their views and aspirations for the future.
- Work with the legal teams in SCC, WSL and external lawyers to establish links between Active Partnership and new governance models for the William Salt Library Trust and a Development Trust (to be established).
- Identify opportunities to pilot and test the framework linked to activities and fundraising.
- Write the Framework to support the Round 2 HLF application.

Schools and learning offer

The Staffordshire History Centre learning programme will be developed to deliver a wide range of learning activities to schools, colleges and universities. These will include school visits to the new Centre and a range of in-school sessions to be delivered across the county to schools. We will build upon and increase our engagement with local universities and colleges to deliver a wide range of learning activities.

The consultant will develop the schools offer delivered at the Staffordshire History Centre and off-site, focussing on Key Stages 1, 2 and 3. A museum/archive/heritage education consultant will be recruited to carry out the following tasks:

- Develop a new Learning Policy with the Participation and Engagement Officer and Community History Development Officer
- Using the policy as a framework, develop the core schools onsite offer at the Staffordshire History Centre and offsite offer for schools. These should be linked to National Curriculum programmes of study and linked to the Activity Plan for the History Centre.
- Research and identify realistic targets for schools engagement

- Consult with local teachers, Entrust (Staffordshire support agency for schools), Arts Connect (regional bridge support agency), young people and users in order to inform this piece of work
- Consult with colleges and universities to develop closer ties and more opportunities for students to work with our collections.
- Investigate the potential of joint schools packages with other museums in the County.
- Subject to a successful Round 2 application a Learning Officer will be appointed to deliver the learning programme. The consultant will be required to carry out a feasibility and sustainability exercise for volunteer support and freelance support to continue delivering the schools offer onsite and offsite after HLF funding ceases.
- Identify effective means of marketing and promoting learning packages to schools, colleges and universities

4. Available documentation

- Staffordshire History Centre brochure
- Report on consultation undertaken for the Staffordshire History Project during 2014 and 2016.
- Staffordshire History Centre Outline Activity Plan (February 2016).

5. Project Partners and Management of Commission

Staffordshire County Council

Staffordshire and Stoke on Trent Archive Service
Staffordshire Record Office, Eastgate Street, Stafford, ST16 2LZ
Key Contact: Project Executive - Joanna Terry, Head of Archives & Heritage

Strategic Property Service, 2 Staffordshire Place, Tipping Street, ST16 2DH
Key Contact: Tina Nixon, Project Manager – Capital Programme

William Salt Library Trust
William Salt Library, Eastgate Street, Stafford, ST16 2LZ
Key Contact: Mithra Tonking, Chairman of the Trust

The commission will be managed by members of the Project Team as follows:

Chris Copp, Senior Museums Officer
Matthew Blake, Participation & Engagement Officer

6. Work Plan

We plan to start this contract in January 2017 and we are aiming to submit the Round 2 HLF application in February 2018.

Budget

Up to £26,000 has been allowed for this commission including £15,000 for Activity Plan preparation, £5,000 for development of Active Participation Framework, £5,000 for Learning Programme and £1,000 for Evaluation.

The costs quotations should include all expenses such as travel costs, venue hire and facilitation costs and all other expenses. Your application will be assessed on competitive price and value for money.

The partners will endeavour to provide low cost or free meeting and workshop venues.

Payment will be made on receipt of invoices. The contracted party/parties will be responsible for paying their own tax and NI.

The full terms and conditions of the consultant's appointment will be in accordance with Staffordshire County Council's standard procurement procedures [attached].

Please note that, while not the only criteria, value for money is a key element of our evaluation criteria. You should provide an informed estimate of the cost of the proposed procurement. Submit all prices in pounds sterling and indicate VAT separately, if applicable. Quoted prices will be fixed and firm for the duration of the contract.

Contract duration and Milestones

Staffordshire County Council (SCC) will award the contract to the successful tenderer for the period January 2017 – December 2017.

The estimated milestones for the work to be submitted as part of this contract are:

- Project initiation 30 Jan 2017
- First draft (Active Partnership Framework) 31 March 2017
- Second Draft (Active Partnership Framework) 28 April 2017
- Complete work (Active Partnership Framework) 30 June 2017
- First draft (Activity Plan) 30 June 2017
- Second draft (Activity Plan) 1 Sept 2017
- Consultation 18 Sept – 11 Nov 2017
- Consultation report and analysis 1 Dec 2017
- Complete work (Activity plan) 15 Dec 2017
- Section for Round 2 application 15 Dec 2017
- Final bid Feb 2018

8. Process for submitting proposals

Tender response requirements

In responding to this tender, please include:

- Details of how you propose to meet all of our requirements and outputs listed above
- Your proposed project methodology
- Detailed project plan
- Clear and detailed budget for the project, including daily rates of staff employed
- Previous experience of providing similar services
- Detailed CVs for any staff members proposed with your tender
- Quality assurances procedures
- Skills and experience in:
 - Working with archives, museums or other heritage organisations to make their collections more accessible to the public

Staffordshire History Centre Project
Development Phase Project Tender Specification

- Museum, archive and heritage education
- Audience engagement
- Successful HLF bid writing
- Ability to inspire people from a wide range of backgrounds
- Consultation with the public (groups and individuals)
- Conflict management and resolution to develop shared vision
- Imaginative/innovative approach but based in practicality

Evaluation Criteria

Selection of the successful consultant will be carried out by assessment of their proposal followed up by the interview. All submissions will be measured against criteria listed below:

Criteria		Weighting
Value for money	Competitive price and ability to deliver value for money	30%
Quality	Success rate submitting similar bids in the past. Evidence of successful project delivery, ability to deliver on time and to high quality. Experience suited to the project and proposed methodology	30%
Experience	Understanding of the archive, museum and heritage sector, the project and its key deliverables, evidence of experience that is relevant to the listed requirements, comprehensive and relevant approach to the brief, implementation and capacity.	30%
Experience	Consultation data analysis. Clarity of writing, including strength of narrative and avoidance of unnecessary jargon. Experience and track record delivering similar projects	10%

All correspondence in relation to this tender, including tender submissions, should be made via the County Council e-tendering portal.

Tender Timetable

Please see below a detailed timetable of when specific events will take place and specific deadlines which must be met in order to participate in this tender.

Event	Date/Time
Tender Notice posted	21 November 2016
Tender response deadline	15 December 2016 (12 noon)
Interviews (if applicable)	w/c 17 January 2017
Anticipated contract award	w/c 17 January 2017

9. Terms and conditions

The full terms and conditions of the consultant's appointment will be in accordance with Staffordshire County Council's standard procurement procedures [attached].

Compliance

We reserve the right to disqualify or reduce the evaluation score of any tenderers who do not fully comply with the requirements in the tender documentation, in particular the closing time and date. We reserve the right to evaluate proposals on a variety of criteria. The tender with the lowest price will not automatically be accepted.

10. Tendering

If we need to amend any tender documents before the closing date, we will write to you with any changes. If we extend the deadline for tender responses, we will advise you.

SCC is not responsible, and will not pay for any expenses or losses you incur during, but not limited to, the tender preparation, site visits, post-tender negotiations or interviews.

Information and questions

If you need us to clarify the documentation or if you have further questions regarding the tender process, please contact us via the e-tender portal. We will respond to reasonable requests for further information within the timescale of the tender.

Return of Tender

All documents should be returned via the e-tender portal.

Post-tender interviews

SCC reserves the right to ask you to attend post-tender interviews or present your proposals. You are responsible for all your expenses when attending such interviews. If required, interviews will take place 17 January 2016 at Staffordshire Place 1, Stafford, ST16 2LP. SCC reserves the right to conduct post-tender negotiations with one or more tenderers.