



Guidelines on commissioning and tendering for interpretation projects

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INTRODUCTION

The most successful interpretation projects are the product of a good relationship between the supplier and the client. That relationship begins with the procurement process.

These guidelines have been compiled with the advice from experienced procurers and suppliers with the aim of encouraging better specifications and submissions. They highlight some of the factors that can make tendering and briefing difficult and offer some pointers to making the process better for all concerned.

PART 1

Includes advice to procurers from the tenderers' perspective, including notes on what should be included in a good brief.

PART 2

Advice to tenderers from the procurer's perspective.



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PART 1

SPECIFYING THE WORK – ADVICE TO PROCURERS

This section is based on the views of experienced suppliers of interpretation products and services.

There is no such thing as a standard procurement process for interpretation projects. There are big variations in the briefs and procurement requirements that organisations and agencies issue when seeking tender submissions for interpretation work. Some of this variation reflects the range of work that interpreters are involved in and the range of bodies that commission it.



1.1. What to ask for

Give as precise a description as possible of the skills and services you need, why you want them, when you want them and what you can contribute to the process. The tenderers will then decide how interested they are in your contract based on that information.

Include as much background information as you can, including photos, maps, plans, strategic documents etc.

Detail your overall project timetable – make sure it is realistic and allow plenty of time for consultation, consideration and feedback.

Be reasonable in what you ask for in the tender. Compiling a pitch for work is costly. If possible, ask for responses to be within a particular page limit or word count – to make it easier for you to appraise and for the consultant to respond. Consultants will gauge a project's value and make decisions on how much time they can commit to the tender based on that.

Similarly, be proportionate in the level of insurance that you stipulate. Ask for a level appropriate to the risks for this project. Do not simply copy requirements from much larger, or riskier contracts.

1.2 Managing the tender process

Be clear about how the tender is being advertised i.e. whether it's being sent to a select number of specific contacts or whether it is an open tender.

Good suppliers are usually busy. Allow time for a proper response from them – at least four weeks is standard and more if spanning holiday times.

Provide a contact name and details to whom all queries can be addressed, and ensure that person is available for the duration of the tender period. Make sure the contact person is knowledgeable about the contract and will be involved in the work. They also need to know why the contract is needed – a procurement officer or administrator may not be appropriate as the named contact if detailed advice is sought on a specialist interpretation contract.

In the interests of fairness, most government procurement rules require that written responses to tenderers' questions be circulated to all parties interested in the contract. If this applies, make it clear so that tenderers can avoid provoking answers that may reveal their approach to competitors. If you welcome dialogue with prospective tenderers you need to make that clear, possibly by stating that only the answers to factual clarification questions will be circulated.

Offer an accompanied site visit if possible. This helps the consultant and enables you to get a feel for a possible working relationship. It also signals that you take the process, and by implication the work to be contracted, seriously and are prepared to commit your time to the process.

1.3

Asking for prices

Interpretation projects are almost always original bespoke solutions, so pricing them accurately is time-consuming and depends on tenderers being given as much information as possible.

Be clear whether you need budget figures / estimate costs e.g. for a funding bid or accurate quotations. If the funding for the project is not in place ask for estimated costs not quotes or tender submissions.

If you have no idea of a fair price for the work, do some homework to help you to be realistic. Ask around your own or other organisations to find out what they have paid for similar work. Most suppliers and consultants will be happy to have an informal chat and give you confidential guidance on what the likely price of the work will be and on options to consider.

Provide some budget guidance. Many projects can be tackled in a range of ways at a range of prices. Being clear about your budget allows suppliers to tailor their bid to suit your resources and needs. If you do not give guidance you are likely to receive a range of submissions that are hard to compare. The lowest bid is not necessarily the best value bid but if some good submissions have over-shot your (undisclosed) budget, you've wasted their time and reduced your options.

1.4

Choosing the supplier

How important is price?
Providing it is within your budget, quality is the main consideration so make sure that your scoring system reflects a range of quality criteria in addition to price and value.

If you have identified a preferred supplier, it is unethical to obtain 'comparison quotes' for negotiation or any other purposes.

State your specified selection criteria and how you intend to score and assess bids so that the suppliers understand your priorities.

Consider how many tender documents you want to receive and look through. It is usually best to narrow the field by using a two-stage selection process. Start with an Expressions of Interest (EOI) and a Pre Qualification Questionnaire (PQQ), then shortlist around four to tender. Try to keep your PQQ as short and succinct as you can, whilst focussing on the things that will really help you select your shortlist.

- Be prepared for one or two drop-outs at the invitation to tender stage.
- One-stage processes may be better for smaller jobs but if it's an open tender process, be clear about that and expect smaller and less detailed submissions.
- Ask for examples of previous work, including case studies that are relevant to your tender. Any content or design proposals created during the tender process will be based on incomplete understanding of your project and it maybe hard for you, or your supplier, to move away from them.
- If you require content or design proposals with the submission, give a very clear brief for a small part of the work and make a small budget available as a contribution for the time commitment you are asking the supplier to make.
- Ask for credentials and referees, and take them up. You can find out what the supplier are like to work with and how they approach the job.
- Only interview those you really want to appoint. Explain the interview panel and their selection criteria and give a date in advance, or ask for a mutually agreeable date.
- Do not interview if you have already made a selection on a good written submission.
- Once you've appointed a supplier, stick to the brief and Terms of Reference. If a change of emphasis is required, discuss the changes and agree with your supplier any variation to the programme and costs.
- Provide meaningful feedback when suppliers are unsuccessful – be honest and provide positive criticism or pointers, not waffle or platitudes. In particular demonstrate that you have used the criteria for success noted in the brief.
- Finally, be prepared to trust your successful suppliers and make time to listen to their advice and work collaboratively – the project will be the better for it.

1.5

Framework agreements

Framework contracts, whereby suppliers compete for a place on a 'favoured supplier' list, are becoming more common. These can work as mini-competitions for each job, so that only the suppliers on the framework agreement are able to pitch for the work. Alternatively frameworks can be on a 'call-off' where a supplier can be offered work directly without the need for further tendering. The latter is usually the more attractive to suppliers.

Frameworks can be the foundation of a good, long term relationship between the client and the supplier. Good framework arrangements will have very clear criteria and stand for a length of time, probably a minimum of three years, to justify the considerable effort of preparing a submission. They can then be much more efficient as a more streamlined tendering process for both parties.

On the other hand, framework contracts often carry a degree of uncertainty as far as suppliers are concerned as it is usually not clear at the point of tendering how much work is on offer. Sometimes suppliers can feel they've put in a lot of effort to get on the framework but then find there are too many suppliers on it or there is insufficient work.

1.6

The Brief

A brief can make or break a project, depending on whether it is well thought through or put together in haste.

All tender requests should contain a clear and well-considered brief. In summary, this will include:

- The project context / the site's significance; include with your brief background information that paints a picture – maps, plans, site descriptions, guidebooks etc.
- How the project is funded.
- Why you are doing this piece of work and how it will be used in future (your objectives).
- The scope of works that you envisage.
- Whether there are partners or stakeholders that will need to be involved with the project.
- Whether consultation is required, why and with whom, over what period.
- Who the target audiences are for your project and whether further audience research is required.
- Whether research is required and what sources are available to consult. State what information is available to consult, and what is not ready / available (and when you can realistically have it ready). If important research is not ready it may hold up the project programme.
- Timeline showing the programme duration, which should be realistic and allow for consultation and feedback.
- The number of meetings including on-site or virtual which are envisaged.
- Who is responsible for sign-off and how sign-off will be agreed.
- What monies are available for the contract and if there are specific conditions or outputs for release of finances.
- What deliverables and outputs are required – plans, number of items if known, their format and content.
- The selection criteria and programme for selection process.
- Client team and responsibilities, plus any consultants who have already been appointed and their areas of work.

A

B

PART 2 WRITING A TENDER SUBMISSION – ADVICE TO SUPPLIER

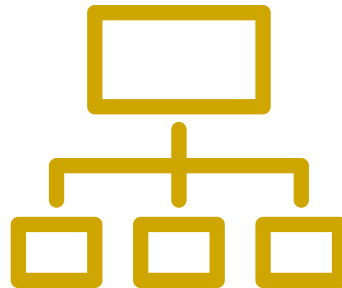
This section is based on the views of experienced procurers of interpretation products and services in the private and public sectors.



2.1 Introduction

Remember the project manager for the contract usually did not create the procurement procedure and that the process may not have been designed for this type of project. Procurers often have to follow a centrally organised procurement system that is used for a multitude of contracts. The system is set up to allow free and fair competition.

While first and foremost procurers aim to appoint a good quality supplier for any work put out to tender, many do not want to place too much of a burden on potential supplier in terms of work involved.



2.2 Responding to the requirements

It is important to read the brief carefully.

Research the organisation and its work. Consider their activities, policies and priorities and explain why you want to work with them.

Pay attention to the weightings applied to evaluation criteria stated in the brief. These can change from brief to brief. Price is not always weighted highest. If, for instance, innovation and creativity have a higher weighting, the client will be looking for evidence of that.

Respond to all elements outlined in a tender brief. Partial responses are very difficult to assess. Explain your fee structure clearly.

Include details of any assumptions you have made in compiling your responses (e.g. client having done certain work prior to contract starting, all installation can be done on one day, client to provide all images, having full access to site during opening times etc.).

If possible, contact the client to ask them any questions you have about the brief.

2.3

Keep it simple, clear and relevant

Procurement often involves reams of paperwork behind the scenes. This burden of paperwork can be compounded by overly verbose and even the inclusion of irrelevant information supplied by bidders.

A fat tender is not necessarily a better tender. Relevant, pertinent and concise responses are helpful to people who have many tenders to evaluate. The easier it is to identify what a company can offer and proof they can meet the brief, the better.

Do not send 'standard' or 'off the shelf' bids that obviously do not address the requirements of the brief. Also avoid pages and pages of experiences and information about previous jobs that bear no relation to the tender requirements.

Procurers can only evaluate what is written. It is therefore vital to mention all relevant or pertinent information even if you know the client well. There is typically a panel of people, usually a minimum of three, who evaluate tenders and they can only make judgments on what is written. If it is not documented, it does not exist and cannot be scored.

When giving examples of previous work include web links or pdfs etc., do not expect the client to do the detective work – they often won't. If the client cannot easily see your work, they cannot judge it and your bid is likely to fail.

Introduce your team and your relevant skills and experience but don't send loads of curriculum vitae type information.

2.4

Be yourself

Be different! Make yourself stand out.

But do not pretend to be something you are not.



DISCLAIMER:

The views expressed in this document are not necessarily the views of AHI, but AHI is happy to endorse these guidelines as a profession-informed attempt to define best practice in tendering from the perspective of both supplier and procurer.

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