

York Museums Trust

Request for Quotation (RFQ)

Contract title	Audience Evaluation and Insight
Type of supply	Expertise to evaluate, analyse and regularly report on our audience data gathered from visitors to York Castle Museum, the Yorkshire Museum and York Art Gallery.
Tender documentation includes	Section 1 – Introduction and guidance Section 2 – The specification Section 3 – How to submit a proposal

Issued: 28 June 2021

Deadline for responses: 5pm, 23 July 2021

Contents

Section 1 - Introduction and guidance	3
1 General.....	3
2 Scope of requirements.....	3
3 Further information	4
4 Notes for completing the quotation	4
5 Confidentiality and freedom of information.....	4
6 Publicity.....	4
7 Supplier conduct and conflicts of interest.....	4
8 Quotation costs.....	5
9 Evaluation for contract award	5
10 Selection criteria	5
11 Award criteria.....	5
12 Pricing.....	6
Section 2 - The Specification	6
13 Introduction	6
14 Service aims and objectives.....	7
15 Technical specification	8
16 Budget and timeframe.....	8
17 YMT team.....	8
18 Deliverables.....	8
Section 3 - How to submit a proposal	9-10
19 Submission timeframe.....	10

Section 1 - Introduction and guidance

1 General

- 1.1 “YMT” means York Museums Trust or anyone acting on behalf of the York Museums Trust, that is seeking to invite suitable suppliers to participate in this procurement process.
- 1.2 Information about YMT is available on our website www.yorkmuseumstrust.org.uk

2 Scope of requirements

- 2.1 YMT wishes to award a contract to a supplier to evaluate and analyse YMT visitor data collected by YMT to create a series of reports (four at York Art Gallery, three at York Castle Museum and one at the Yorkshire Museum) at pre-determined intervals to help us better understand our audiences and to inform our future plans as an audience focused organisation.
- 2.2 The contract will be for a period of eight months (September 2021 – April 2022.)
- 2.3 YMT aims to notify suppliers of the contract award by August 17 however suppliers should note this is for indicative purposes only and YMT is not bound by this date.
- 2.4 Suppliers should note the dates for this procurement process and ensure their availability as appropriate. The timetable is indicative at this stage and may be subject to alteration by YMT.

Stage	Task	Date / Proposed Date
1	RFQ issued	June 28 2021
2	Deadline for clarification questions	July 12 2021
3	Queries answered	July 19 2021
4	Deadline for RFQ responses	July 23 2021
5	Evaluation period completed	July 30 2021
6	Interviews	August 12 2021
7	Appointment	August 17 2021
8	Kick off meeting (week commencing)	September 1 2021

- 2.6 As part of the final evaluation process YMT will contact shortlisted suppliers to attend an online interview. Interviews will take place on August 12 2020.

3 Further information

- 3.1 For electronic submissions, electronic signatures or the name and position of the designated person is sufficient.
- 3.2 YMT can only consider submissions which have been fully completed. If you do not complete the documentation properly YMT cannot consider your submission.

4 Notes for completing the quotation

- 4.1 This request for quotation document has been designed to assess the suitability of a supplier to deliver YMT's requirements. If your organisation already provides goods / works / services to YMT you must still complete the quotation in full. YMT can only evaluate information provided as part of this submission.

5 Confidentiality and freedom of information

- 5.1 As a public body, YMT is subject to the provisions of the Freedom of Information Act 2000 in respect of information it holds. Any member of the public or other interested party may make a request for information.
- 5.2 Suppliers are responsible for ensuring that any confidential or commercially sensitive information, the disclosure of which would be likely to diminish the supplier's competitive edge, has been clearly identified to YMT.

6 Publicity

- 6.1 No publicity regarding the services or the award of any contract will be permitted unless and until YMT has given express written consent to the relevant communication.

7 Supplier conduct and conflicts of interest

- 7.1 Any attempt by suppliers or their advisors to influence the contract award process in any way may result in the supplier being disqualified.
- 7.2 Suppliers are responsible for ensuring that no conflicts of interest exist between the supplier and its advisors, and YMT and its advisors. Any supplier who fails to comply with this requirement may be disqualified from the bid process at the discretion of YMT.

8 Quotation costs

- 8.1 YMT will not be liable for any quotation costs, expenditure, work or effort incurred by a supplier in proceeding with or participating in this quotation process, including if the quotation process is terminated or amended by YMT.

9 Evaluation for contract award

- 9.1 Responses will be assessed considering the principle factors of selection criteria and award criteria.

10 Selection criteria

- 10.1 Each selection criteria questions indicates whether it is for information only (I) or a threshold (T).
- 10.2 The selection criteria will be evaluated first. Suppliers should note that in order to move to the award stage they must satisfy all threshold questions (T). If your organisation fails any of the selection criteria your bid will be disqualified.

11 Award criteria

- 11.1 Weighting will be based on 30% price and 70% quality of proposal.
- 11.2 Each award criteria question indicates whether it is for information only (I), a threshold (T) or a scored question.
- 11.3 Please see Section 3 How to submit a proposal for quality questions making up 70% of the scoring process
- 11.4 Quality questions are scored on a scale of 0 to 5. This is based on how your organisation responds to the question with reference to the detail contained in the specification. The score your proposal received will then be divided by the maximum score available; 5 and then multiplied by the question weighting to give you a score for each question.
- 11.5 Quality questions will be scored using the following scoring criteria:

Score	Criteria for awarding score
0	Complete failure to grasp / reflect the issue or does not provide a proposal
1	Serious weakness, or doesn't address the question in any meaningful way
2	Proposal falls short of expected standard, and reflects limited understanding missing some aspects. Significant weaknesses or risks associated with answer.

3	Proposal meets the required standard in most material respects, but is lacking or inconsistent in others.
4	Good understanding and interpretation of requirements.
5	Excellent understanding and interpretation. Innovative, practical and proactive with sound strategy.

12 Pricing

- 12.1 The lowest priced bid shall be awarded the full 30% and bids with a higher price will be scored pro rata.
- 12.2 The score from the quality and price evaluations will be combined to produce a total score.

Section 2 - The Specification

13 Introduction

Since its formation in 2002, York Museums Trust has developed into an innovative, energetic and successful organisation responding creatively and positively to a demanding and fast changing environment. YMT works closely with partners in York and the wider museums sector. They make a significant contribution to the economic and educational welfare of the city and wider region. YMT receives National Portfolio Organisation (NPO) funding from Arts Council England. The Trust generates an income of c £6.5m pa and employs more than 90 people. All income, including ticket income, supports the charity to preserve the collections, gardens and buildings and continue to offer high quality access to those collections.

Our **Vision**

Working together with audiences and communities to inspire, to share and to care for cultural heritage.

Our **Mission**

York Museums Trust shares collections, gardens, buildings, art and stories for learning, enjoyment and wellbeing. Rooted in York and Yorkshire, we look outwards nationally and globally. As a charity, our income enables the Trust to care for heritage and to benefit all.

Headline Priorities

Our priorities are:

- Survive the Covid-19 crisis and work together with audiences and communities to recover and rebuild
- Deliver innovative public programming which supports an audience-focused, inclusive, visitor-first approach
- Progress two capital projects: the Castle Transformation Project and the Collections Development and Storage Project
- Increase our resilience by expanding enterprises and fundraising activities, investing in our people, and caring for our environment
- Improve York and York Museums Trust's profiles through local, regional, national and international leadership and partnership to maximise YMT's impact.

14 Service aims and objectives

As outlined in our headline priorities, YMT is committed to being an audience focused, inclusive organisation with a visitor first approach. The impact of the pandemic has transformed our audiences, with national data suggesting inequality in the arts has been exacerbated and will increase further in the future.

As we emerge from the pandemic we want to better understand who our audiences are and how they can grow, both in terms of number but also in diversity so they are more representative of the country in which we live. Crucially, we want the thoughts and opinions of our audiences and the insights we gain through our research to be reported in an accessible and usable way so the data we gather is integral to everything we do.

Currently we use both Audience Finder and Culture Count's Impact and Insight Toolkit to help us evaluate our audiences, both of which are a requirement of being an NPO. During the pandemic, and for the next 12 months at least, a post visit survey emailed to ticket buyers will be our main mechanism for gathering this data.

During the last 12 months the evaluation and analysis of this data has been completed by members of YMT's communications and public engagement teams. However, with capacity stretched, YMT now seek external support and expertise to help evaluate and report on the new data we collect which they will use to create a series of reports.

15 Technical specification

YMT wishes to appoint an audience development consultant to help the Trust analyse and evaluate audience data following the reopening of York Art Gallery, the Yorkshire Museum and York Castle Museum. This will lead to the creation of a series of reports (four at York Art Gallery, three at York Castle Museum and one at the Yorkshire Museum) at pre-determined intervals to help us better understand our audiences. The report intervals will be:

York Art Gallery:

- The exhibition *Grayson Perry: The Pre-Therapy Years* (May 28 – September 5 2021)
- The exhibition *Young Gainsborough: Rediscovered Landscape Drawings* (October 1 2021 – February 13 2022)
- The free permanent displays (May 2021 – October 31 2021)
- The free permanent displays (November 1 2021 – March 31 2022)

York Castle Museum

- Museum audience (June 21 – November 12 2021)
- Christmas offer audience (November 13 2021 – January 3 2022)
- Museum audience (Jan 4 – March 31 2022)

Yorkshire Museum

- General audience including Richard III display (July 9 – October 31 2021)

The consultant will use the analysis and evaluation of this data combined with other relevant secondary research and their deep knowledge and understanding of visitor trends and behaviours in the UK tourism / arts marketplace to create each of the reports.

The reports should be written in an accessible way with insights, recommendations and conclusions to help inform YMT's decision making in line with our ambitions and priorities.

On completion of the reports, the successful applicant will be available to present the key findings to YMT, virtually or face to face.

The successful applicant will have extensive experience of evaluating audiences of museums and galleries at a high standard which can be submitted to key funders and stakeholders.

16 Budget and timeframe

The maximum budget for this consultancy is envisioned to be up to £15K, to include all expenses and consumables. Please see the Deliverables for more information,

Key dates:

Description / task	Date due
Kick off meeting (week commencing)	September 1 2021
Progress meetings	TBA with supplier
Grayson Perry audiences report	October 11 2021
York Art Gallery free displays audiences report (May-Oct)	Nov 29 2021
Yorkshire Museum and Richard III audiences report	Nov 29 2021
York Castle Museum audiences report (May – Nov)	Dec 13 2021
York Castle Museum Christmas offer audiences report	Feb 1 2022
Young Gainsborough audiences report	Mar 14 2022
York Art Gallery free displays audience report (Nov-Mar)	Apr 25 2022
York Castle Museum free displays audience report (Jan-Mar)	Apr 25 2022

17 YMT team

There are three main contacts within YMT for this piece of work.

Lee Clark – Communications and Evaluation Manager

Laura Turner – Exhibitions Programme Manager

Jo Killeya – Head of Public Engagement, Collections & Curatorial

18 Deliverables

The consultant will:

- Review current data gathering processes and survey questions asked in current visitor surveys to ensure effective data collection
- Use expertise and experience to analyse and evaluate YMT visitor data, drawing conclusions and insight to help inform YMT's decision making in line with our ambitions and priorities
- Collate and compile key findings into easily accessible and usable reports within the timeframe set out above
- Identify key opportunities to expand our current audiences, both in terms of scale and diversity

The consultant will:

- Offer excellent value for money
- Abide by all appropriate health and safety legislation, General Data Protection Regulation and Institute of Fundraising best practice guidance
- Treat all information supplied by YMT in commercial confidence

Section 3 – How to submit a proposal

Please include the following information in your submission which will be scored according to the below weighting:

A breakdown of costs by activity	30%
Sector knowledge, insight and experience. Examples and case studies of similar work recently (within last five years) undertaken to include at least three references and testimonials	30%
Project management methodology, including a proposed schedule of work drawing on / cross references with the draft timeframe and deliverables	40%
We will then shortlist to no more than five suppliers and invite them to interview where we will be looking for more information on the individuals who will be working with us and specific details of the programme. The exact criteria for this stage will be released at the time.	

In accordance with the below timeframe, please submit any queries and your final submission by email to lee.clark@ymt.org.uk

19 Submission timeframe

Stage	Task	Date / Proposed Date
1	RFQ issued	June 28 2021
2	Deadline for clarification questions	July 12 2021
3	Queries answered	July 19 2021
4	Deadline for RFQ responses	July 23 2021
5	Evaluation period completed	July 30 2021
6	Interviews	August 12 2021
7	Appointment	August 17 2021
8	Kick off meeting (week commencing)	September 1 2021