



LEANCHOIL

Invitation To Quote for preparation of Community Heritage Activities Plan in support of applications to the National Lottery Heritage Fund

Background

Leancoil Project – Growing Wellbeing from Heritage

The Leancoil Project was borne out of a desire by the community of the Forres area to save, conserve and repurpose the former Leancoil hospital which was closed by NHS Grampian in 2018. To achieve this, Leancoil Trust is undertaking a community asset transfer (CAT) of the hospital site and is working with partners to deliver its vision of a community health and wellbeing centre, veterans' activity centre and supported living accommodation.

The CAT process is nearing completion, with conditional missives concluded, and it is anticipated that transfer of ownership will be achieved in early 2025. There will then follow a 2-year construction period with the opening of the Leancoil Centre scheduled for early 2027.

The Trust has spent the last 4 years building relationships with key partners (Hanover Scotland, Erskine Veterans' Charity, and Scottish Ambulance Service). It is working with a wide range of organisations to develop a robust and sustainable business model for Leancoil to ensure its future as a heritage community asset. We are embarking on a capital fundraising programme to raise £4.5 million for the renovation with applications to the National Lottery Heritage Enterprise Fund and other large funders being submitted in the next 12 months.

Leancoil Trust (The Trust)

The Trust was established in 2020 and is a company limited by guarantee with charitable status. There is a board of 9 volunteer Trustees who all live in the Forres area and are passionate about saving Leancoil and finding it a sustainable future. They are supported in their work by a Project Development Officer (PDO) and Project Co-Ordinator (Technical) (PCT).

Objectives

As a result of a successful application to the National Lottery Heritage Fund, Leancoil Trust has been awarded funding for the Development Stage (First Round) under the Heritage Enterprise programme.

Scope of Services – General Requirements

Quotations are invited for a professional to produce the Community Heritage Activities Plan as part of the project Development phase. This document will form part of the application (Second Round) to the National Lottery Heritage Fund under the Heritage Enterprise grant programme.

Scope of Services - Specific requirements

The appointed professional will be required to produce a Community Heritage Activities Plan.

This is to include a detailed table of the activities laid out in the National Lottery Heritage Fund Action Plan template as a final section in a comprehensive Activity Plan, which should contain as a minimum the following sections:

- **Executive summary**
- **Context and Introduction**
 - Leancoil Trust and Growing Wellbeing from Heritage
 - The need and purpose of the Plan
 - Plan Structure
- **Site Details and context**
 - Location and surrounding community
 - Leancoil Trust and Partners
 - Site Description
 - Historic and Heritage Context
 - Community Context
 - Current Activities
- **Audiences for the Activities**
 - Current Audiences
 - Potential Audiences- who is missing?
 - Target Audiences
 - How the activities relate to outcomes
- **Development Phase Activity themes**
 - Activity Aims
 - Pilot activities, review and evaluation
- **Review of the outline of the Community Heritage Activities**
 - Detailing changes to the Outline Plan during the development phase, including changes to aims, themes, and partnerships developed.
- **Community Heritage Activities Plan**
 - The Action Plan [National Lottery Heritage Fund template]-
<https://www.heritagefund.org.uk/funding/good-practice-guidance/activity-plan-guidance>

- Monitoring and evaluating the activities. These should be set against The National Lottery Heritage Fund's four strategic principles.
- Management of activity programme- roles & responsibilities

- **Appendices**

The above list of contents is set out as a suggested format and discussions will take place between the appointed consultant and Leancoil Trust on the format of the final plan.

In the development of the plan, the consultant will:

- Engage with Leancoil Trustees, key stakeholders and partners, including one-to-one meetings and interviews with key individuals from the education, training, heritage & culture, health service and community and third sectors.
- Review case studies to support new and creative activities.
- Work closely with the LT Project Development Officer (who will lead the delivery of the pilot activities), including leading on pilot activity feedback and evaluation.
- Liaise with the Project team to ensure proposed activities support the wider project aims, complement the wider masterplan and are deliverable within the National Lottery Heritage Fund programme and budget.

The successful consultant will be able to draw on the support of the Project Development Officer, Project Co-ordinator (Technical) and Trustees in accessing information on the proposed scheme.

Resources

The appointed consultant will be provided with the following documents:

- Outline Community Heritage Activities Plan
- Map of the site
- Development Phase application
- Access to background information from the project

Fees and Costs

Quotes to include the following:

- Lump sum figure for the services outlined in the General Requirements and Specific Services above. This is to include all expenses (including travel).
- A breakdown of the fee proposal by days and day rate/s, and expenses.

Additional Information

Copyrights & Intellectual property rights

Rights to use, publish and reproduce the information contained in the applications and supporting documents, either in part or whole, will be held by Leancoil Trust

Insurance

The successful consultant/s will be required to have as a minimum,

the following insurance cover for any one occurrence or series of occurrences arising from one event:

Professional Indemnity £1,000,000

Public Liability £1,000,000

The consultant will be asked to exhibit their PL and PI document schedules before commencement of the work.

Contact details:

The contact details for this Invitation to Quote:

Jana Hutt, Leancoil Trust Trustee

Email: jana@leancoiltrust.org



Leancoil – Growing Wellbeing from Heritage project is made possible with The National Lottery Heritage Fund. Thanks to National Lottery players, we have been able to progress plans to save Leancoil Hospital for the community.

Scottish Land Fund
Ionmhas Fearainn na h-Alba

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Leanchoil Trust

Invitation to Quote for a Community & Heritage Activity Planner – Selection and Assessment Criteria

The responses will be subject to a quality/price evaluation of 70/30%

Quality – 70%

The quality part will cover the following areas – Selection and Assessment Criteria

Evaluation Criteria	Weighting
Selection criteria	
Evidence of previous relevant experience in preparing community and heritage activity plans in support of National Lottery Heritage Fund applications.	pass/fail
Evidence of relevant experience of working on built and/or cultural heritage projects	pass/fail
Form of submission - all information provided	pass/fail
Award criteria weighting (dependent on type of contract)	70/30 quality/price
Quality criteria weighting	
Demonstrable experience in preparing heritage activity plans and working with communities.	60%
An understanding of the requirements of the National Lottery Heritage Fund.	30%
Evidence of knowledge of the local area, stakeholders, and community.	10%

With the exception of price/cost, all other evaluation criteria shall be scored using the following scale of awarding marks between 0 and 4:

4	The response is very detailed and excellent in all areas. The response addresses the requirement with clear details demonstrating how the project outputs will be met in many or exceeded in all areas.
3	The response is detailed and good in all areas. The response addresses the requirement with clear details demonstrating how the project outputs will be met in many, but not all, areas.
2	The response is sufficiently detailed and acceptable. The response addresses some elements of the requirement and demonstrates how some of the project outputs will be met.
1	The response is generally poor. The response addresses some elements of the requirement but does not demonstrate an ability to meet many of the project outputs.
0	Nil or inadequate response. Fails to demonstrate an ability to meet any of the requirement.

Pricing – 30%

The response should:

- provide a staged and overall price for the work, exclusive of VAT;
- specify the hourly rates for each person to be involved in each stage of the work;
- state the estimated number of hours each person would spend on the work;
- estimate the out-of-pocket expenses and disbursements to be charged, along with an explanation of what makes up this cost.

In scoring the weighting on the pricing aspects, this will be scored on the basis that the lowest bid will score the maximum 30 points – other bids will be scored in relation to how their overall price compares with the lowest bid.

Award

On completion of the evaluation process, the Trust will award the project to the successful bidder who has the highest combined score for quality and price. LT reserves the right to accept other than the lowest priced tender or to accept no tender at all.



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