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(Name of Consultant)

**Invitation to Tender for Phase 2 INVEST NI
Collaborative Growth Programme Project:
Strangford Lough Cluster Group**

Summary Instructions

ITEM	DETAILS
Submission instructions:	<p>Either electronic or hard copy submissions will be accepted.</p> <p>If you wish to submit a hard copy you are required to send 1 hard copy of the completed tender containing the information required in Section 4.</p> <p>The envelope should be clearly marked with “Strangford Lough Cluster Group” with no external markings identifying the Tenderer.</p> <p>Last date and time for receipt is set out below.</p> <p>Failure to return your Tender in accordance with all of the instructions may result in it being excluded from consideration.</p>
Date and time for tender return:	Tuesday 2 February 2021 at 5.00pm
Tenders to be sent to:	<p>Echlinville Distillery Limited 62 Gransha Road Kircubbin Co Down BT22 1AJ</p> <p>Or by email to: peter@echlinville.com</p> <p>Submit queries by email to: peter@echlinville.com</p>

Introduction

Phase 1

The Strangford Lough Tourism Cluster was established in early 2019 and comprises key tourist operators and stakeholders from the Strangford Lough area, supported by Invest NI, Tourism NI, Ards and North Down Borough Council and Newry, Mourne and Down District Council. A list of members and stakeholders can be found at Section 3.

The Cluster was assisted and financially funded by Invest NI through its Collaborative Growth Programme (Phase 1) and the funding enabled the appointment of independent facilitators who assisted the Cluster in carrying out a Scoping Study to investigate the potential to establish a collaborative network of SMEs around Strangford Lough. Working with the key tourism stakeholders, the Cluster identified how best to exploit economic opportunities arising from collaborative working on new products and experiences in the area.

Phase 2

Having secured further funding from Invest NI, the Cluster now wishes to appoint a facilitator/s to guide and manage the Cluster, over a 30-month period, to co-ordinate effective delivery of an agreed set of SMART objectives and ensuring a commercial return for all the Cluster Members.

1. Conditions of Tender

Tenderers must provide all of the information required in **Section 4** of this document.

Only one Tender is permitted from each Tenderer. In the event that more than one is submitted by a Tenderer the one with the latest time of submission will be evaluated and the other(s) disregarded.

The Tender (including prices) should remain valid for a minimum period of 90 days.

Any signatures must be made by a person who is authorised to do so.

Your full registered business/name and main office address must also be provided on all documents.

Tenders must not be qualified in any way and must be submitted strictly in accordance with this tender.

2. Information About Tender Submissions

The Cluster does not undertake to accept the lowest or any tender and reserves the right to accept the whole or any part of any tender submitted.

Tenders which are not substantially complete or which are non-compliant may be rejected.

Where the pricing of a Tender is abnormally low the Cluster reserves the right to reject the Tender.

Tenders will be evaluated against the criteria set out in **Section 5**.

During the evaluation period, the Cluster reserves the right to seek clarification from the Tenderers, by email and/or interview, to assist it in its consideration of their Tenders. Details of the required interview process will be provided to Tenderers during the evaluation phase. The clarification process will not be a scored element of the Tender evaluation, but may be used to confirm and validate the scoring given for the assessment of the Tender.

3. Scope of Works - Context

The Lead Company for the purposes of this project will be Echlinville Distillery. It holds the Letter of Offer and the grant in trust on behalf of the other members of the Cluster. These members are: Denvir's Historical Coaching Inn; Finnebrogue Woods; Mobile Team Adventure; Portaferry Hotel; Indie Fude; Sustainable Journeys Ireland; Tracey's Farmhouse Kitchen; Exploris; St Patricks Centre; Portico; Friends of Greyabbey; Castle Espie Wetland Centre; and Ballygraffan Stables. It is intended that further SMEs will be added as the Phase Two project rolls out.

Representatives from the following stakeholder organisations have also agreed to participate in the project: Portaferry Regeneration; Tourism NI; Tourism Ireland; Ards and North Down Borough Council; Newry and Mourne Borough Council; South Eastern Regional College (SERC); National Trust; Department of Communities (Historical Environment Division); NI Tourism Alliance; Hospitality Ulster; and the Northern Ireland Hotel Federation.

During a best practice study carried out during the Phase One Scoping project, the cluster had the opportunity to explore two alternative forms of collaborative governance structures; that of Loop Head Tourism in County Clare and the Lough Derg Marketing Group. The group considered the merits and challenges of these, and a number of other models, before opting for a Community Interest Company (CIC) approach. Further details of the model can be found at **Appendix 1**.

The **project objectives** are as follows:

- To position the area proposition/experiences within the new NI Experience Brand ('Embrace A Giant Spirit'); and within surrounding destination brand propositions;
- To signpost local businesses to business support and capacity building initiatives relevant to the sector offered by the Councils and other stakeholders;

- To provide tailored mentoring support for business owners on how to fully exploit the emerging visitor markets i.e. pricing and margins, route to market, content creation, sales and digital skills;
- To stimulate the development of new visitor experiences, create opportunities for tourism businesses to cluster with local producers, retailers, hospitality providers and offer bespoke visitor experiences and packages supporting entrepreneurship/new business start-ups;
- To enhance/develop digital capacity; online booking facilities etc;
- To establish a formal cluster framework, with an agreed decision-making process, clearly defined strategic goals and a forum to support collaborative working with Councils and stakeholders.

To meet the objectives, the group will implement a workplan based on five workstreams, providing quarterly updates and a final report which demonstrates evidence of outcomes and impacts related to the following activities:

Strategy Development: Further develop the Proposition for Strangford Lough positioned within NI Experience Brand, so as to raise the profile of Strangford Lough as a premier visitor destination on the Island of Ireland and a European destination of excellence with a sound Sustainable Tourism policy.

- Building on the Mapping and Proposition development work carried out in Stage One Scoping Study, further refine this proposition in line with NI Experience Brand and propositions within the NMD and AND Council areas.
- Undertake an in-depth Business Canvas Modelling Exercise to test and agree propositions and target markets and customer segments.
- Identify additional business membership and key stakeholders to support proposition, ensuring that current and new members have the necessary skills to engage with Network activities
- Develop sound sustainability principles and an agreed internal Sustainability Policy, outlining any specific accreditations which add value to the cluster
- Participate in wider discussions around Intangible Cultural Heritage, Green Tourism and Geo Park designation to maximise the value of the AONB.

Product Development/Commercialisation: By end Q1 2021, launch a series of saleable experiences, identifying at least 1 signature experience from each provider for each of their target customer segments which support the proposition for key target markets.

- Build on the Scoping Study market testing with operators and refine experiences and bundles based on outcomes of Strand One.
- Identify the opportunity to develop experiences focused on wellness, sustainability, Green Tourism, Food tourism and Tangible & Intangible Cultural Heritage
- Identify new experiences which are aligned to the proposition from new and current membership base ensuring experience development is aligned to market needs.
- Ensure that appropriate pricing architecture is established for market segments and members are adequately prepared to price for profit.

Business 2 Business Engagement - Create an integrated, annual engagement plan to support the proposition for B2B sector (ie. tour operators) which will lead to greater awareness of the Strangford Lough destination and increase annual revenue for each provider.

- B2B - Creation of a strategic identity and competitive positioning of the Strangford Lough Cluster to ensure credible recognition within the tourism industry.
- B2B - Work with both Councils, TNI and Tourism Ireland on annual trade show and Meet the Buyer programmes. Developing an annual Media and Fam Trip programme with Councils and relevant partners aligning with Tourism Ireland and Tourism NI B2B business support and communications platforms.
- B2B - Preparing for implementation develop a proposition toolkit (from visual identity guidelines to imagery creation) that will support members to communicate key messages about their joint saleable experiences across all platforms. These assets will be developed jointly with both Councils and shares for their usage.
- B2B - To ensure that trade partners understand the collaborative offering, develop a B2B communications strategy for wider businesses within Strangford Lough AONB detailing saleable experiences, accommodation offer and Sustainable Tourism credentials.

Business 2 Consumer Engagement: Create an integrated, annual consumer engagement plan to support the proposition for the B2C sector which will lead to greater awareness of the Strangford Lough destination and increase annual revenue for each provider.

- B2C - Alignment with TNI Digital Platform development.
- B2C - Supply native marketing collateral which can be used by TNI and Councils to support any developments in terms of signage, wayfinding, print and POS within VICs and key tourism attractions and businesses.
- B2C - Develop compelling campaigns that will include imagery and stories from saleable experience development which will be shared with Councils and TNI to use to promote the collaborative activities of the cluster.
- B2C - Support and supply content to primary digital platform owners within TNI. Work closely with owners to understand performance and achievements of marketing activities which can be delivered as evidence to support the direction of the marketing activation.

Governance and Operations: create, grow and sustain a representative network which is fit for purpose, meeting the needs of its members and sustainable over the longer term with formal structures in place which will allow for further funding opportunities and business development.

- Financial management of the project, including budget estimates, monitoring and controlling expenditure and financial reporting to the Cluster Management Committee and Invest NI, including long term sustainability beyond this project

such as opportunities through Peace IV funding and other cross border/European funding.

- Implement appropriate formal governance structures including Community Interest Company (CIC) structure identified in Scoping Study. Oversee implementation of formal working structure of the group including developing qualifying criteria for new members.
- The Working Group will agree protocol and a Collaborative Working Agreement between the Cluster and both Councils to set out working relationships, roles, responsibilities and resource implications.
- Stakeholder Engagement Plan with agreed roles, strategic alignment, budget resource implications and opportunities for best practice and knowledge transfer.
- Develop the Collaborative Agreement and Operating Guidelines for the Cluster Management Committee to include structure, decision making and reporting processes and admin structures.
- Develop sound sustainability principles and an agreed internal Sustainability Policy, outlining any specific accreditations which add value to the cluster.

4. Tender Submission Contents

Tender submissions must provide all the information as required in this section, in the same order and using the same numbering.

Tender submissions must provide the following information:

4.1. Quality:

4.1.1. The approach and methodology for delivery of outcomes and impacts related to the Phase 2 objectives as outlined.

4.1.2. Details and CV(s) of the personnel to be used in the delivery of the project. This must include: (a) details of experience in delivering collaborative projects, ability to work under pressure to deadlines and within a compliance framework and budgetary parameters; (b) experience and knowledge of public sector stakeholders involved in the tourism industry, current strategic direction of each and available funding mechanisms; (c) knowledge of the Northern Ireland tourism market, strategic context and growth targets, clustering and experience development, international key visitor target markets and the role branding and marketing can play; (d) evidence of the ability to identify and leverage new commercial opportunities/business models; and, (e) the ability to provide regular and accurate reporting, including the provision of a comprehensive final written report.

4.1.3. Delivery times to complete each of the five workstreams.

Please note that Tenderers must score at **least 60 marks** in this section. All Tenderers who fail to reach this minimum hurdle will not have their response to section **4.2.1** evaluated.

4.2. Price:

- 4.2.1. Tenderers must submit their charges and costs on a pricing schedule by completing the table contained within **Schedule 1**.

You should note that the daily rate should take into consideration the time needed to deliver against the objectives outlined above, and also to carry out the required administration related to the project including reporting to Invest NI (formally on a quarterly basis but may also involve responding to adhoc/informal requests for information).

The daily rate should also take into consideration collecting and verifying timesheets, compiling the final report, assisting the Lead Partner in preparing project claims, any mileage the facilitator/s incurs while travelling within Northern Ireland on behalf of the network.

5. Tender Evaluation and Award Criteria

Tenders will be evaluated against the following award criteria:

Award Criteria	Question Number	Score	Weighting
Quality			
	Question 4.1:	Total 100 Tenderers must reach the minimum score of 60 marks for this section. The breakdown is as follows:	80%
Methodology	4.1.1	45	
Personnel and Experience	4.1.2	45	
Programme	4.1.3	10	
Price			
Pricing	Question 4.2	Total: 100	20%
Price	4.2.1	The Tenderer who submits the lowest daily rate will receive 100% of the available marks. Other Tenderers will receive proportionately less, relative to the percentage that their tendered fee exceeds the lowest tendered fee. Daily rate is capped at 8 hours and £400 per day.	

SCHEDULE 1

Pricing Schedule

The total budget for the project is £169,600.00

Activity	Budget
Facilitation	£163,600
Study Visits	£6,000
Total	£169,600

The Tender should detail the total days and rate for each section of the Project as specified below:

		Number of days	Rate
Item 1	Daily Rate		
	Facilitation – Refer to 4.2.1		
	Sub-total		
Item 2	Associated Costs		
	Study visits You should note that the £6,000 budget is the maximum to be used for facilitator travel costs only . (Time required for planning and attendance should be factored into facilitation costs at Item 1)		
	Sub-total		
	TOTALS		

APPENDIX 1

The following Business Model was agreed:

- The network would formalise as a Community Interest Company (CIC). • The CIC company would be run by a representative board with a Chair, Vice Chair, Company Secretary and Treasurer. Board Membership would be limited to 12 and would include sectoral and geographical representation.
- In the first year, the position of Chair, Vice Chair, Company Secretary and Treasurer would be voted on by the members of the Collaborative Growth Network. They will be responsible for working with the facilitator to put in place an interim governance structure and procedure for selecting other interim board members in a fair and equitable manner. Full elections for the positions will take place as part of the Annual General Meeting at the end of Year 1.
- All board members would assume the role of director, in-line with Company House regulations.
- Each of the sectors would have their own working group chaired by a Director.
- The board would be supported by various ad hoc task Groups such as branding and marketing, events, supply chain development etc. as deemed appropriate by the board.
- Membership of the network would be free to all local food and drink producers who meet the agreed criteria to ensure critical mass and a fair representation of the product mix.
- The board would be responsible for running two networking and information events per annum and a programme of training and business support events for all company members.
- The CIC would have ownership and control over the development of all branding and marketing collateral such as the website, social media POS material etc.
- Income would be generated by individual businesses paying for specific services of direct commercial benefit to their business i.e. marketing/branding support. While the CIC structure and governance framework will provide sustainability for the network in its own right, the network must also consolidate and grow meaningful collaborative partnerships with key stakeholders in which it is made explicitly clear the nature and scope of the relationship and what is

expected in terms of contribution and delivery. This should take the form of a formal Partnership Agreement which is reviewed annually by all parties. The proposed delivery framework is based on transparency and promoting better communication and engagement between the businesses and also between the various sectors.