



**Libraries  
Connected**

## Future Funding

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Income Generation Capacity Building Programme

# Invitation to Tender for Commercial Skills Development Programme

August 2020



## Overview

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Libraries Connected is seeking a training and skills development organisation to develop and deliver a core commercial skills development programme for public libraries.

We are seeking organisations that can demonstrate an ability to support library leaders to develop the skills to generate income within a public sector and public service ethos.

This Invitation to tender (ITT) specifies the requirements for the delivery of this core commercial skills development programme for public libraries, which is funded by Arts Council England.

Deadline for receipt of tender proposals: noon, Monday 28<sup>th</sup> September

Return to: [ian.moore@librariesconnected.org.uk](mailto:ian.moore@librariesconnected.org.uk)

### Table of Contents

<b>1</b>	<b><i>Background to the programme</i></b> .....	<b>3</b>
<b>2</b>	<b><i>Future Funding Programme</i></b> .....	<b>5</b>
<b>3</b>	<b><i>Programme Structure</i></b> .....	<b>7</b>
<b>4</b>	<b><i>Service Specification for bidders</i></b> .....	<b>10</b>
<b>5</b>	<b><i>Workplan and Milestones</i></b> .....	<b>12</b>
<b>6</b>	<b><i>Budget</i></b> .....	<b>13</b>
<b>7</b>	<b><i>Process for submission of bids</i></b> .....	<b>14</b>
<b>8</b>	<b><i>Compliance</i></b> .....	<b>15</b>

# 1 Background to the programme

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## 1.1 Libraries Connected

Libraries Connected is a charity founded in 2018. It builds on 20 years' experience as The Society of Chief Librarians (SCL). We are now partly funded by Arts Council England as the Sector Support Organisation for public libraries. We have a small team of staff and trustees. We are proud to remain a membership organisation comprised of every library service in England, Wales, Northern Ireland and the Crown Dependencies.

Libraries Connected takes a leading role in the development of public libraries, advocating for continuous improvement on behalf of local people, and leading the debate on the future of the public library service.

*Our vision is an inclusive, modern, sustainable and high-quality public library service at the heart of every community in the UK. We work to promote the value of libraries, broker national partnerships, share best practice and drive innovation in the sector.*

## 1.2 The Public Library Sector's position and its role in recovery

Public libraries engage with a more diverse section of the population than any other arts or cultural institution. Taking Part data cited by the Audience Agency in 2017<sup>1</sup> demonstrated that libraries reach a much broader range of age groups and social backgrounds and a higher proportion of black and minority ethnic users compared with other types of cultural activities. There is also less of a divergence in library usage between higher and lower socioeconomic groups, compared to other cultural activities. Public libraries are our most inclusive institutions.

Funding for public libraries has traditionally been from local government. However, this had fallen by £243m per year in real terms<sup>2</sup> over the 10 years to 2019 – many library services losing a third of their funding. While some library services have been successful in identifying additional sources of income, all public library services remain reliant on this local government funding to be sustainable. We do not yet know the full impact of COVID on local authority budgets, but IFS are suggesting a £2billion shortfall for local authorities in 2020/21<sup>3</sup> - this is more than twice the national spending on public library services. Looking further ahead, projections vary significantly in how the COVID crisis will impact the economy and local authority finances over the coming decade, but the picture seems to be one of a difficult decade of recovery at best.

Given this position of repeated reductions in income over the past decade, significant gaps in current local authority funds and a challenging decade ahead, public libraries need to look to protect themselves

<sup>1</sup> Evidencing Libraries Audience Reach; Audience Agency; 2017

<sup>2</sup> Public Libraries: The Case for Support; CILIP and the Big Issue, 2019

<sup>3</sup> COVID-19 and English council funding: how are budgets being hit in 2020–21?; IFS 2020.  
<https://www.ifs.org.uk/publications/14977>

by broadening out their funding base. For those library services where this has been the strategy for some time, they may be at an advantage as they will have either brought in or developed the skills to generate income. A large number of services however, have not been able to invest in these skills and these are the library services we are primarily targeting with this programme.

Our view of the library services and the recovery of the wider economy is that they can – and should – interrelate. Library services can provide valuable universal support to those seeking education and employment, as well as supporting those whose health or wider circumstances are restricting their access to work and learning. Bringing income into the library services then benefits the local communities and economies, as well as creating positive change. As public libraries are our most inclusive institutions, when we place them at the core of economic and social recovery, we help the whole community to recover and create systems that are fairer and stronger.



## 2 Future Funding Programme

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Future funding is an Arts Council England funded programme delivered by Libraries Connected. Its goal is to support public libraries to develop skills, abilities and knowledge necessary to take a proactive approach to diversifying and increasing their income.

### 2.1 Overview of programme

The aim of the programme is to help library services develop the skills and knowledge required to actively develop and deliver income generation strategies for their services.

To support this we are:

- Creating and delivering a programme of training and skills development using an action learning approach, supporting engaged libraries to create real plans to identify and develop opportunities within their service
- building support and mentoring networks
- sharing knowledge and best practice from across the library sector, neighbouring sectors, as well as wider public, private and voluntary sectors.
- creating specialist groups to explore opportunities to develop commissioning of library services in prisons and schools, as well as making the best use of IP resources, venues and spaces, and performance archives
- creating an underpinning group considering the ethical implications of the programme – it is not this group's place to be prescriptive about ethical considerations, but to highlight areas of possible difficulty and provide information and tools for library services to make their own ethical decisions

Our aim by the end of the programme is for the co-production group to continue as a commercial reference group for the sector, with the specialist workstreams continuing according to need, and an ongoing ethical aspect continuing integrated into a wider sector ethical group. Due to the co-production approach we are taking, these aims may shift according to need and resources as we begin to understand the nuances of the sectors needs in this area.

### 2.2 Principles behind the programme

- There is significant commercial and fundraising expertise in the library sector already but there are not the dedicated mechanisms to share it. This expertise is valued particularly highly as it is specialised to the sector and messages coming from partner libraries may be more directly applicable than those from outside the public sector.
- There are significant lessons that can be learned from within the public and third sector where services have faced similar challenges around funding and reconfiguration – including parallels to the separate commissioned library services.
- Input direct from the commercial sector is critical. The understanding and expectations of private sector companies when contracting library services may not immediately align with the library service and staff values, and this is an interface that must be negotiated for these partnerships to work.

- We should build on existing structures and networks. We will leverage our regional networks to explore large scale commercial activity, supported by collaboration and resource sharing to bring economies of scale
- We are taking a positive proactive approach taking into account the challenges that the libraries may have – building on an understanding of these obstacles, but then asking “what does it take to make it work?” and then evaluating the viability – or otherwise – of this.
- We are aiming to create and cascade learning – this must have a lasting impact on the sector and on individual library services, but we can also develop skills in libraries that can then be accessed by library users.
- The programme must be built around an ethical core, reflecting public libraries’ need to balance public service, statutory duty and income generation. This can be a complex balance of a unique set of circumstances for libraries to achieve and so space will be given to consider these issues as part of the programme.



### 3 Programme Structure

The programme is led by a Project Board (steering group) with a development group to support the delivery of:

- Skills Development Programme
- Toolkit Development
- Mentoring Programme
- Webinar Series

These will interrelate and inform each other and we see the programme as one that will develop and grow iteratively as we learn from delivering it.

Project Development and Management



Skills development programme



Toolkit Development



Mentoring programme



Immediate Support Webinar Series



#### 3.1 Core programme

The primary way that public libraries can benefit is through the skills development programme. The programme will run across a 12 month period and we are seeking around 10 library services for each delivery cohort.



Training and development will follow a capacity building model, with a focus on using real-life scenarios as the “training-ground” for new skills (including use of our large-scale commercial projects as training-grounds). The programme will deliver a suite of learning modules on core areas, and libraries will be supported through mentoring to put these to work in their own service. We will also use the large-scale commercial projects as a “training-ground”.

The detailed programme will be developed with the co-production group and the procured provider, but our outline areas of focus are:

- Strategies of funding – balancing diverse funding streams
- Financial preparedness
- Business planning
- Cost modelling – ensuring full cost recovery
- Risk management
- Market analysis
- Marketing
- Contract management and fulfilment

## 3.2 Toolkit Development

One of the outputs of the programme will be toolkits for wider distribution of the learning from the programme. We have taken the opportunity over the past months to explore and research models of the toolkit and this will be structured in two parts:

### Commercial skills handbook

This will cover the areas in the core programme with tools and techniques for developing budgets, creating partnerships etc. The tools that are created will be released and used throughout the programme.

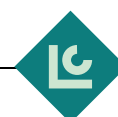
### Commercial strategy handbook

We will develop a document to support commercial strategy and use a thriving communities model to demonstrate how commercial strategy can be applied to the wider environment.

Within this handbook there will be scoping of relevant stakeholders, opportunities, case studies and examples, area specific measures of value and impact.

## 3.3 Mentoring Programme

Once the core skills development programme is under way, we will be launching a programme using mentors from within and outside of the public library sector, matching skills and experience with the needs of the library services.





## 3.4 Webinar Series

A programme of additional webinars and workshops will be delivered to meet the immediate needs of library services – these will be scheduled after the first intake of core programme members and will cover the following areas:

- Income generation strategy – a model for libraries as drivers of community sustainability
- Mapping out an income strategy
- Partnership working
- Commissioned services
- Costing activities and services
- Section 106 / CIL funding
- Marketing and promotion
- Fundraising through trusts and grants
- Community fundraising
- Room hire



## 4 Service Specification for bidders

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### 4.1 The provider

We are seeking an organisation experienced in developing and delivering training to develop skills around commercial awareness and income generation. We appreciate the values of the public library sector which are rooted in public service, in providing equal access to information and services and acting in a manner that maintains the high levels of trust and integrity with the public. This brings particular considerations in income generation for libraries and we are seeking a partner who can demonstrate an understanding of these considerations.

### 4.2 The programme

The proposed 12-month programme will be delivered to 4 cohorts of around 10 people each. We expect the first two cohorts to begin in October / November 2020, and the second two cohorts to finish by March 2022. There will be a period of overlap in the middle, and this could be an opportunity to bring those towards the end of the programme together with those just starting to share experiences and expectations.

Delivery will be primarily virtual with the potential for face to face sessions as appropriate – we have no strong preference on face to face over virtual and feel in the current circumstances a flexible approach is more realistic. We are keen that the cohorts are given the opportunities for collaborative learning on real practical challenges they are currently facing, with the aim that they will provide immediate peer challenge and lasting peer support.

The areas of the programme should be based around the following but we would work with the provider to identify the specific areas covered.

- Strategies of funding – balancing diverse funding streams
- Financial preparedness
- Business planning
- Cost modelling – ensuring full cost recovery
- Risk management
- Market analysis
- Marketing
- Contract management and fulfilment

People attending the programme will be at a management or head of service level within the library service and their level of experience will range from those new to commercial thinking to experienced business development managers seeking to develop further. We will be collecting information as part of the recruitment process to enable streaming of the participants and would want to discuss with the provider what criteria we stream against.

We do want to pitch this core programme to be accessible to those managers whose commercial experience is limited to managing expenditure within a defined budget. While there are pockets of commercial expertise across the sector, in general library services have not been able to invest in the

development of these skills to date and so this programme will be a first step into income generation for most of the participants.

### 4.3 Online learning platform

Providers are expected to either use their own platform or we can create and provide access to a BaseCamp project group for each of the cohorts.

If using their own platform the providers will need to ensure it provides a safe and secure space for learning and can be accessed using a web browser and standard video conferencing tools (Teams / Skype / Zoom or others as appropriate)

If using our BaseCamp platform providers need to outline how it will be used alongside video conferencing.

### 4.4 Contract Management

The contract will be managed by a Project Manager recruited by Libraries Connected working alongside Iain Moore, Commercial Director at Libraries Connected.

The successful development organisation will report into a Programme Board.

They will also be required to gather data and costs to enable timely reporting to Arts Council England throughout the programme.

### 4.5 Note on timeframes

We are aware of the tight timeframes for this procurement and delivery round – while our timetables have been delayed by lockdown, the impacts of COVID place additional urgency for library services, so we have opted to condense rather than delay further. This means that not only are the timescales for return of tenders tighter than we would usually allow, the expected delivery timescale is such that the programme may begin before the full programme is completely developed.

In our view this allows us to develop and evolve the programme as we and the provider begin to see the participants' areas of expertise, need and interest, and we would encourage bidders to highlight this kind of flexibility and responsiveness in their bid.

## 5 Workplan and Milestones

We envisage the project will follow this workplan, but proposals can set out an alternative timetable to meet the brief.

Activity	Time Period
Invitation to tender to seek course provider Expression of interest from library services	August - September 2020
Appointment of successful course provider	September / October 2020
Recruitment and allocation of Cohorts 1 and 2	September / October 2020
Programme Delivery for Cohorts 1 and 2	October 2020 – September 2021
Mid Programme Review 1	March 2021
Recruitment and allocation of Cohorts 3 and 4	Feb / March 2021
Programme Delivery for Cohorts 3 and 4	April 2021 – March 2022
Mid Programme Review 2	October 2022
Final Programme Review	March 2022

## 6 Budget

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A maximum of £54,000 is available for this project inclusive of VAT and all contractors' expenses. This should include delivery of all the following components:

- Virtual sessions, content and all costs associated with the platforms to facilitate this
- Online modules, content and all costs associated with the platforms to facilitate this
- Any face to face sessions planned and the hiring of venues and equipment, refreshments etc
- Recruitment and paying expert speakers where appropriate
- Data gathering and monitoring to feed into the external evaluation.

Libraries Connected will pay general administration to get the programme up and running, Programme Board costs, external evaluation costs and the costs of launch and of a closing conference if it is safe to go ahead with that.

### 6.1 Payment terms

Payment at key milestones in three instalments subject to satisfactory delivery of programme phase and report to Programme Board in line with ACE payment schedules.

## 7 Process for submission of bids

### 7.1 Procurement timetable

- Invitation to tender sent out: 1st September 2020
- Deadline for proposals: noon, 28th September 2020
- Possible interviews: 6th October 2020
- Appointment and initiation: 12th October 2020

### 7.2 Proposal submission

Please submit proposals by email to [iain.moore@librariesconnected.org.uk](mailto:iain.moore@librariesconnected.org.uk) by noon on 28<sup>th</sup> September 2020.

Proposals should be no more than 1500 words and should include:

	Evaluation weighting
An outline methodology for achieving the brief including: <ul style="list-style-type: none"> <li>• Proposed course components</li> <li>• How the course will be delivered</li> <li>• How positive engagement for the group would be encouraged</li> <li>• How streaming / banding of the cohorts could be achieved</li> </ul>	40%
A demonstration of how your values align with the aims of the public library services and how you would ensure consideration of values and ethics is present in the programme	20%
A statement of your skills and experience in context of this brief including names and experience of each person assigned to the project. Examples and links to relevant reports you have written or contributed to should be included.	20%
An outline work plan and timetable for this work.	10%
A clear breakdown of costs which includes all rates, fees and expenses you are anticipating for the project. If you are VAT registered this must be included in your costings.	10%
Two contactable referees who could provide a relevant reference of your suitability to work on this project.	Pass / Fail

## 8 Compliance

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Libraries Connected reserves the right to disqualify any provider's response to this tender if it does not fully comply with the requirements contained therein. This is particularly relevant in relation to the stated closing date and time of applications.

Libraries Connected is not responsible for and will not pay for any expenses or losses you incur during, but not limited to, the application preparation, visits, negotiations or interviews in relation to this procurement process. It is your responsibility to ensure that any consortium member, sub-contractor and adviser abide by the conditions set out by Libraries Connected.

In submitting a response to this ITT, it will be implied that you accept all the provisions of this ITT including these conditions.

If Libraries Connected needs to change any information contained within this ITT before the closing date, we will advise you of these changes through the channels the ITT was advertised, and this includes the extension of any submission deadlines. Libraries Connected reserves the right to cancel or suspend this ITT process at any time but will notify you through the identified channels as soon as possible if this occurs.



Email:

**[info@librariesconnected.org.uk](mailto:info@librariesconnected.org.uk)**

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