

# **North Soar Trails Syndicate**

*Consultant required: undertaking a feasibility study  
into a tourism project.*

## **Invitation to Tender**

Copyright © 2009 North Soar Trails Syndicate. All rights reserved. This document is supplied purely for the purpose of assisting suppliers to respond to this invitation to tender, no part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) for any other purpose.

### **Contents**

#### **1 Introduction**

- 1.1 Project Goals and Objectives
- 1.2 Purpose of this Invitation to Tender
- 1.3 Form of Tenders
- 1.4 Procurement Timetable

#### **2 Background**

- 2.1 Organisation Background
- 2.2 Technical Environment
- 2.3 Current Business Systems

#### **3 Scope and Scale of Systems**

- 3.1 Scope
- 3.2 Scale

#### **4 Key Requirements**

#### **5 General Requirements**

#### **6 Detailed Functional Requirements**

#### **7 Technical Requirements**

#### **8 Cost Information Required**

#### **9 Supplier Information Required**

- 9.1 General Information
- 9.2 Proof of Supplier's sound Financial and Company Standing
- 9.3 Evidence of Capacity to Deliver Contract Requirements
- 9.4 Other

#### **10 Implementation Requirements**

#### **11 Instructions to Suppliers**

#### **Appendices**

## **1 INTRODUCTION**

*The “North Soar” is an area of south west Rushcliffe in the county of Nottinghamshire that is defined for the purposes of this project as the area of Rushcliffe district bounded to the west by the River Soar and to the east by the A60. To the north the district boundary is the River Trent, and to the south the county boundary. To designate the exact area, the parishes on the A60 are included in their entirety, and the urban communities of West Bridgford and Clifton (the latter not being part of Rushcliffe) are excluded. It is believed this area of approximately 50 square miles (6 miles x 8 miles) has the potential to become a centre for tourism and as such support an initiative to develop walking and cycling trails in the area. The purpose of the project is to undertake a feasibility study that will confirm or contradict this claim and, if positive, will identify strengths and weaknesses, and specifically document any concerns or shortfalls that will help the management team to develop the areas potential.*

### **1.1 Project Goals and Objectives**

*The key goal is to produce a feasibility study to identify the viability of the North Soar area (as defined in the introduction above) as a centre for tourism through an initiative to develop walking and cycling trails, enhancing the appeal of the established attractions in the area, and linking the trails with points of interest to broaden and deepen the tourism experience. The outcome of the study to be a foundation document that is capable of supporting further fund raising activity to support and develop the areas potential.*

### **1.2 Purpose of this Invitation to Tender**

*This invitation to tender is to invite consultants with experience in tourism and the identification of tourism potential to tender for the work involved in a feasibility study and produce documentary outcomes of the feasibility of the area to become an identified centre for tourism by the development of walking and cycling trails.*

### **1.3 Form of Tenders**

*The tender must include the rate for doing the work and additional costs such as travelling expenses. The information requested under section (9) (“SUPPLIER INFORMATION REQUIRED”) must be provided, as well as a likely completion date. It is not assumed that the work will be undertaken on contiguous days as it is recognised that it may be mutually advantageous to timetable the work to fit around restraints of both parties, and in particular the availability of key stakeholders who can provide local input.*

*A local office could be made available from 9:00 to 12:30 (Mondays to Fridays) only, on the understanding that this will be a base in the area (e.g. to meet local contacts). No office equipment (other than a table and chairs and basic lighting and heating) will be provided unless specifically asked for in the tender document.*

### **1.4 Procurement Timetable**

*The target procurement timetable is as follows:*

- *Tender opening and local selection of shortlisted suppliers 20<sup>th</sup> November 2009. (Note: Shortlisted suppliers will be notified by phone or e-mail on the 20<sup>th</sup>).*
- *The shortlisted suppliers will be invited to make a presentation to the members of the North Soar Trails syndicate on the 25<sup>th</sup> November 2009.*
- *It is the intention of the syndicate to announce the chosen supplier on the 27<sup>th</sup> November 2009. The syndicate, however, reserve the right to delay the announcement if circumstances dictate.*

- The target inception meeting date is the 2<sup>nd</sup> December when the syndicate and supplier will meet to agree the program of work and an agreed action plan with agreed monitoring milestones.
- The draft report should be available by the 1<sup>st</sup> March 2010.
- The final report should be available by the 15<sup>th</sup> March 2010 and published in conjunction with a final presentation to which the syndicate and key stakeholders will be invited.

*It should be noted that the very tight timetable outlined above may have to be relaxed. In particular the fund provider requires a minimum of three suitable respondents to this invitation to tender, and the syndicate would not be in a position to make an appointment in the circumstance where allocated funding is withdrawn.*

## **2 BACKGROUND**

### **2.1 Institution's Background**

*Initial work was done in the North Soar area by a Greater Nottingham Action on Tourism (GNAT) project that was undertaken by Rural Community Action Nottinghamshire (RCAN see: [www.rcan.org.uk](http://www.rcan.org.uk)). After a meeting at Manor Farm Donkey Sanctuary (East Leake) in November 2007, there was a general feedback from those present to look at the potential for tourist developments in the area. This resulted in a local steering group being formed, and after a year of investigation and researching the areas potential another event was held at the same venue in February 2009 after which the North Soar Trails Syndicate was formed in March 2009 to formally take over from the Greater Nottingham Action on Tourism project.*

*The North Soar Trails Syndicate as an organisation is still in its infancy, and has yet to engage fully with the local organisations that are the owners and suppliers of the “attractions” that are seen as the key to realising the areas visitor potential. They have all been contacted and are generally supportive of the project with most being very keen to get more involved within the constraints of the demands of their own business.*

*The North Soar Trails is seen as an identifiable branding for the area, the area being particularly rich in a network of footpaths and cycle routes that can be exploited for their tourism potential.*

*A key event in the North Soar area at the end of August (the Bank Holiday weekend) 2009 was the Inland Waterways National Festival which is recognised as a major event attracting visitors in large numbers from a wide area. To build the experience of the North Soar Trails Syndicate, the syndicate decided to have a trade stand at the Caravan Club National Rally, held just outside the North Soar Area in May 2009, and arranged to act as distribution agents for booking forms for the Inland Waterways association and distribute leaflets on behalf of some of the key attractions in the North Soar Area. This proved very successful, with a significant demand for walking and cycling routes, and is seen as a stepping stone to enable increasing local involvement in support of the tourist related businesses in the area.*

*It is against this low-key background of achievements to date that we are looking for a consultant to pick up from where we are, with our initial contacts, and produce a feasibility study into the areas tourism potential through the development and publication of walking and cycling routes linking with existing attractions and points of interest, such that we can take the project forward with confidence, and attract any funding that will be required to develop the project by providing a quality supporting document as an output of the feasibility study.*

### **2.2 Technical Environment – The Visitor Attractions in the area.**

*(Note: An ‘attraction’ is considered to be a location where a visitor would spend an hour or more where as a ‘point of interest’ (not documented here) is somewhere that a visitor may loiter for a few minutes. Although a sightseeing helicopter flight will last less than an hour, its*

inclusion is justified here because the total time including check-in and its appeal justifies classifying it as an attraction.)

*The identified attractions in the North Soar Trails area are:*

- *Manor Farm Donkey Sanctuary, East Leake (25,000 day visitors 2008 season)*
- *Great Central Railway (Northern), Ruddington (10,000 day visitors 2008 season)*
- *The Heritage Centre (The Ruddington base for Great Central Railway) includes model railways and a historical transport collection.*
- *Eglantine Vineyard, Costock*
- *East Midland Helicopters, Costock (sightseeing flights)*
- *Horse Riding and Pony Trecking with tuition, Bunny Hill, Costock*
- *Canal/River Boat Cruise, Zouch*
- *Museums (2) Ruddington*
- *Garden Centres (2) Costock & Bradmore*
- *Country Parks (2) East Leake & Ruddington*
- *Formal Gardens and historic house, Thrumpton Hall*
- *Leisure Facilities (Bowls, Golf, Tennis, etc.)*
- *Historical churches with visitor appeal*

*There is an extensive network of public footpaths, bridleways and minor roads in the area, suitable for walking and cycling. To-date these have limited local (parish level) documentation that does not attempt to link with the areas attractions (listed above) or points of interest that can be exploited.*

## **2.3 Current Business Arrangements**

*Prior to the initial work done in 2007 by the Greater Nottingham Action on Tourism (GNAT) project, there was no coordination of activity of the visitor related businesses in the area to adopt a common marketing and identifiable branding. The attractions in the area fall into a range of categories from private owned businesses, through volunteer organisations that are registered charities, to Local Authority facilities.*

*The outcome of the November 2007 GNAT event has been the formation of the North Soar Trails syndicate. The syndicate is a volunteer organisation that is dedicated to the development of tourism in the area, and is working with many of the identified attractions to provide a sustainable approach to the mutual benefit of businesses and visitors to the area.*

*The North Soar Trails Syndicate have identified the potential of using events in the area like the Caravan Club National Rally to have a presence and promote the area by distributing leaflets with visitor appeal that have been provided by the businesses and the local authority. This "test marketing" approach forms an early phase of the overall plan. Key to the way forward from here is the strategic feasibility study that is now called for and is the purpose of this invitation to tender.*

*The North Soar Trails Syndicate is keen to develop walking and cycling trails as a way of linking and focussing the areas appeal to visitors. Other examples of the use of trails are to be found on the web, and the initial work of the syndicate would indicate that there is a potential for this approach. A feasibility study is seen as a way to identify the inevitable strengths and weaknesses, and hence the viability of developing this approach.*

### **3 SCOPE AND SCALE OF SYSTEMS**

#### **3.1 Scope**

*The project is to undertake and document the results of a feasibility study into the possibility of the North Soar Trails area becoming a local centre of tourism by developing walking and cycling trails in the area to build a cohesive tourism experience. It is anticipated that grant funding will be put in place to achieve this outcome, and it is recognised that it will be necessary to limit the scope of the project to meet the requirements of the funding provider. It is anticipated that a S.W.O.T approach is adopted in undertaking the study, and this analysis will form the basis for any decisions and further work that may be necessary.*

#### **3.2 Scale**

*An idea as to the scale of the project is set out above, in particular the size of the area and the “attractions” that have been identified in the area. The North Soar Trails Syndicate will provide supporting information in the form of leaflets and web addresses to substantiate the offerings of the identified “attractions”. In addition the North Soar Trails Syndicate will facilitate any introductions that may be necessary to address specific issues. The North Soar Trails Syndicate has already begun to develop contacts with the supporting businesses like hotels, guest houses, restaurants and pubs, as well as supporting shops. In addition the officers and elected members of the three tiers of local authorities in the area are approachable, and the syndicate will facilitate any contacts that may be needed.*

*Whilst the scale of the project is left somewhat nebulous, it is considered that much of the feasibility study will be achieved by a combination of a desk review of the material available and the experience of the consultant undertaking the study in identifying what to look out for and what questions need to be asked.*

### **4 KEY REQUIREMENTS**

*The requirement is to undertake a feasibility study into the potential of the North Soar area to become a centre for tourism by creating walking and cycling trails to broaden and deepen the visitor appeal that is to be found in the area. This should be documented so as to make specific reference to any shortcomings and remedial action that will be required to achieve the goal. The final submission must be of sufficient detail and quality as suitable to be used in support of further funding that may be required to develop the project in the short and medium term. If capital expenditure is identified as being necessary, then qualified comments on Return on Investment (ROI) should be considered.*

### **5 GENERAL REQUIREMENTS**

*The North Soar Trails Syndicate considers that to get “best value” from the feasibility study it is necessary to operate a form of strategic partnership between the appointed consultant and the syndicate. This will ensure that information already collected by the syndicate can be used, with the appointed consultant using project experience to efficiently augment the available information from other sources as necessary.*

*As the North Soar Trails Syndicate is made up exclusively of volunteers, all with other responsibilities, it is assumed that the work undertaken may not conform to a contiguous time span. Although every effort will be made by the syndicate to facilitate the work, it will be necessary to make mutually acceptable appointments when interfacing with the syndicate members.*

*The work undertaken should be done to a mutually agreed project plan with key milestones at intervals during the life of the project. An estimate of the percentage of work completed towards each key milestone should be submitted to the syndicate for review at agreed intervals. The appointed consultant will be expected to discuss and implement any remedial*

action that may be necessary to complete the tasks, and at all times work within the budgetary constraints of the project.

## **6 DETAILED FUNCTIONAL REQUIREMENTS**

To complete the feasibility study and meet the aspirations of the North Soar Trails Syndicate who require and commission this study, it is envisaged that the existing available data will be analysed using S.W.O.T. techniques. [For understanding of acronym, see: ([http://en.wikipedia.org/wiki/SWOT\\_analysis#Evidence\\_on\\_the\\_Use\\_of\\_SWOT](http://en.wikipedia.org/wiki/SWOT_analysis#Evidence_on_the_Use_of_SWOT))]

This, coupled with the experience in the field of the appointed consultant, will enable the feasibility study to answer the question: "Is it feasible that the North Soar Trails area can, through the development of walking and cycling trails become a recognised centre for tourism?" In the course of documenting the results in the form of a feasibility study [defined: <http://www.businessdictionary.com/definition/feasibility-study.html>] the S.W.O.T. analysis may identify threats and weaknesses that may or may not be able to be addressed either in the short or medium term, and may require investment to mitigate.

It is expected that the consultant carrying out the study will, in the course of documenting the findings, give qualified comment on issues and their mitigation to feed into the business plan that will drive the follow-on phase of the project.

An analysis of the Strengths and Opportunities is seen as leading to a launch pad for the development of a marketing strategy.

In the course of undertaking and documenting the feasibility study, due cognisance should be given to the potential need to use the study to attract future funding.

## **7 TECHNICAL REQUIREMENTS**

The study should be documented using readily available computer technology (e.g. Microsoft Office products (preferred) or OpenOffice products). At the end of the project, three copies of the final report should be submitted, as well as an electronic copy. All copies of material supplied by the North Soar Trails Syndicate should be returned. Any copies of electronic material (e.g. Spreadsheet data, Contact Names & Addresses, etc.) should be treated as confidential and not used for any purpose other than required for the feasibility study either during or after the project, and all such data must be returned or destroyed (with permission of the North Soar Trails Syndicate) on project completion.

## **8 COST INFORMATION REQUIRED**

In tendering for this project, a total cost estimate must be submitted along with a detailed breakdown of the components of this estimate (for example days to be worked, rate per day, travelling expenses, and identifiable costs not otherwise itemised (e.g. stationary, postage, telephone etc. may be an overhead of the rate per day and hence would not be itemised separately)).

Before a contract for the work is placed, it may be necessary to enter discussions to change the scope of the project in line with the finance available to fund the project. If this proves necessary then a mutually acceptable re-defining of the scope will be included in the contract documentation.

The Tender and Contract will be subject to the law of England.

## 9 SUPPLIER INFORMATION REQUIRED

### 9.1 General Information

*Please supply the following information (where applicable):*

- *Contact details, including name, address telephone and e-mail*
- *Registered Company address – if trading as a limited company*
- *Web address – if your business has one*
- *Name & Address of Bankers*
- *Name of ultimate holding company – if part of a group.*
- *Size of organisation – number of employers*
- *The business sector and specialism of the organisation (or yourself if a sole trader)*

### 9.2 Proof of Supplier's sound Financial and Company Standing

*Please supply the following information:*

- *Date of Business Formation (if in last five years)*
- *Ownership of company (or sole trader)*
- *Profit/Loss for last three trading years*
- *Turnover for last three trading years*
- *Are you prepared to supply copies of published accounts for last three years? (Yes/No)*

### 9.3 Evidence of Capacity to Deliver Contract Requirements

*Please supply the following information:*

- *What experiences have you and (if appropriate) your company gained of dealing with similar contracts?*
- *Details on average size of contracts undertaken previously (e.g. by value).*

### 9.4 Environmental impact.

*In the spirit of the project, all work carried out must be done in such a way as to minimise any impact on the local and global environment. For example you could consider your own transport impact and implement a paper saving strategy (for example by remote working and electronic methods of information transfer).*

*In submitting your tender, please include details of your plans and any relevant previous experience you have to ensure you minimise the environmental impact of your work in undertaking this project.*

#### **9.4 Other information required**

*Please supply the following information:*

- *Quality Assurance - details on standards, approach and accreditation.*
- *What contingency provisions are or could be in place if delivery difficulties arise?*
- *Is sub-contracting likely to be involved?*
- *If so, what proportion of work will be involved?*
- *Details re reference sites of comparable size and sector type.*
- *Details on your standard terms and conditions.*
- *Details of Public Liability Insurance you hold.*

#### **10 IMPLEMENTATION REQUIREMENTS**

*Please include the following information in your tender:*

- *Details of the approach you will take to achieve the outcome*
- *The way you intend to manage the project and commitment you require from the North Soar Trails Syndicate.*
- *How you will approach any delays from however caused. In particular have you the flexibility to accommodate situations where key members of the North Soar Trails Syndicate may not be available – they would normally expect to always be available by appointment.*
- *Can you meet the requirements in full and the timescales as detailed in this invitation to tender?*
- *Please specify clearly any assumptions you have made in terms of support you expect from the North Soar Trails Syndicate.*

## 11 INSTRUCTIONS TO SUPPLIERS

*In submitting your tender document, please note the following:*

- a) *Have you provided the information requested in this invitation to tender document?*
- b) *You should preface the tender by a management overview highlighting the key parameters including costs, time-scale and a cost rate (per hour or per day)*
- c) *Information on your company (or business) background should be in the form of appendices so as not to detract from the ease of understanding of your tender document.*

*If there are any details of the Invitation to tender that you wish to clarify, you should contact one of the following members of the North Soar Trails Syndicate:*

*Chairman: Ron Hetherington, 01509-853344 or ron.h1@btinternet.com*

*Treasurer: Brian Dale, 01509-820687 or b.dale1@ntlworld.com*

*Your tender should be submitted in a sealed envelope and clearly marked as "Tender for work to be carried out for the North Soar Trails Syndicate. Private; Please monitor opening".*

*And post to:*

*Mr Kevin Shaw,  
Clerk to East Leake Parish Council  
45 Main Street  
East Leake, Loughborough  
LE12 6PF*

*You can contact Mr Shaw by phone (01509-852217) to confirm receipt only. You will be notified of the outcome by the North Soar Trails Syndicate.*

*You may, if you wish, submit your tender in the form of a Microsoft Word document or PDF file on a CD, DVD or "Memory stick" with a covering letter giving the highlights of your offering. As the tenders will be kept safe until the formal opening, it is not appropriate in this instance to submit your tender by e-mail.*

*The contract will be awarded to the person or organisation who, in the opinion of the North Soar Trails Syndicate, offers the best value when taking into account the consultant's experience and credibility of the offering. The North Soar Trails Syndicate reserve the right not to continue with or award this project should circumstances dictate.*

*Negotiations with short-listed suppliers may take place between the opening of tenders and placing of a contract if, in the view of the North Soar Trails Syndicate, it would be advantageous to help achieve a satisfactory outcome.*

## APPENDICES

*The constitution under which the North Soar Trails Syndicate operates is available for information if required. To obtain a copy electronically please e-mail the chairman or treasurer (e-mail address above).*