AGENCY QUESTIONS AND RESPONSE:

**Organisation The National Lottery Heritage Fund**

**Department** Marketing and Communications

**Title of procurement Brand Development**

**Date 30th April 2020**

**Agency questions and answers**

Please note that we have grouped questions into sections alphabetically and amalgamated repeated questions into one key question. You’ll see that we have been inundated with queries about a range of topics that we’ve endeavoured to answer as best we can in the time we had. We hope these answers are insightful and helpful for developing a proposal.

# Acknowledgement

Q: How have you attempted to gain recognition from past projects you have funded? Have you started the acknowledgement work or would this start with this project?

A: All projects that receive grants are contractually obliged to acknowledge The National Lottery Heritage Fund. However, there are challenges around embedding that as part of the grant journey for recipients and we have not always chased enough. The existing acknowledgement work will continue in tandem with this project, and this work will develop the creative tool to inspire better acknowledgement.

Q: Could you provide some examples for how the Acknowledgement ideas framework currently works and why you think the current approach is deficient?

A: These are given in the appendix, e.g. small logo, no acknowledge of role or amount spent, name spelt incorrectly.

Q: Do you have any examples of poor co-branding between a recipient and the National Lottery Heritage Fund?

A: See examples in the appendix in the brief.

Q: Improved accreditation is clearly very important to you. Is there an opportunity to ‘impose’ requirements for this in your award contract?

A: Acknowledgement of our funding is a requirement outlined in our agreement with grant recipients, although we may review the wording to see if we need to make it more robust.

Q: When an applicant is successful, what collateral do they receive from you? Signage, awards, plaques etc.? Would it be possible to see examples of these?

A: Grant recipients can currently order plaques and other merchandise. Collateral examples are given in the appendix of the brief and will be part of the project visual audit. We are looking to move away from providing pre-made acknowledgement materials to encourage grantees to create their own – relevant to the size of grant and type of heritage. This is an aspect of the brief.

Q: Regarding the challenges of encouraging grant recipient/partners to acknowledge your support, what evidence do you have of the specific blockers for this acknowledgement?

A: We do not have any evidence of blockers, but there may be differing reasons why grant recipients are not acknowledging us – from not being aware of the detail of their contract to not perceiving it as an important factor.

# Agency capability

Q: What are you looking for in the winning agency?

A: See the Section 6, Award Criteria in the brief.Q: Will you accept submissions from or mark against agencies that operation associate models or those that work with long standing partners on a freelance basis?

A: You are still eligible to submit a proposal. Agency capability will be scored as part of the award criteria, as many agencies operate an associate model. We would want key members of the team to be identified and to attend the virtual pitch day.

Q: Have you had any problems with agencies in the past?

A: We are not aware of any significant problems with agencies we’ve worked with in the past and we maintain good two-way relationships with our agencies.

Q: Why is the agency who produced the current brand not continuing with the work? Were there creative differences?

A: The previous brand work was not operated with a holistic brief but more a tactical fast paced brief to satisfy the perceived needs at the time. There were no creative differences with the agency.

# Aspiration and differentiation

Q: What brands do you aspire to?

A: BBC for their national-local brand, National Trust for heritage, The Tate for Arts and Culture. These are just three exemplars related to different sectors and aspects and not a definitive list. Brand aspirations can be explored further in stakeholder engagement as part of the brand work.

Q: You mention the brand needs an injection of creativity - in this respect are there brands out there that you feel do this well?

A: The Tate for Art and Culture.

Q: What sets you apart from other heritage funds?

A: We are the largest dedicated grant funder of heritage in the UK. We are unique in covering the full breadth of natural, cultural and intangible heritage, across the UK. Our funding has sustained and transformed the UK’s heritage over the last 25 years and we use an inclusive and democratic approach to heritage.

# Audiences and channels

Q: What are the main channels and applications you imagine using or having a presence on?

A: Increasing digital so all digital, social media channels and across the marketing mix. All the main MarComms channels, internal communications (intranet, weekly newsletter, Executive Board comms), print, global, social media.

Q: Do you have more detailed information on your current audiences, for example personas, or any new audiences you are looking to attract?

A: We don’t have any personas or more information on new audiences.

Q: Can you explain a little more about your audiences. – Do you segment them by type of heritage organisation, size, location or other? Do they have to pitch for funds regularly or are they mostly long term projects? Could/do you have conversations about branding at funding pitch stage? How difficult would it be to have a systematic brand monitoring system in place?

A: We provide different levels of funding to heritage of all shapes and sizes – from small community level projects to sizable national heritage institutions. Our grants range from £3,000 up to millions of pounds – you can see the different funding programmes and levels on the ‘Funding’ section of our website. Branding is not currently integral to the application, but acknowledging our funds is a contractual agreement once a grant has been confirmed. We are working towards having a more robust approach to how we engage grant recipients from applications stage right through the customer journey. We need to engage both our grant recipients and our client facing staff on this.

Q: What other grants are commonly applied for by our audiences? Do any of these carry particular prestige and if so why?

A: Our grantees may apply for grants from charitable trusts and foundation or other Lottery distributors.

Q: Can you elaborate on the assessment criteria used for funding decisions? i.e. What sits behind the National Lottery Heritage Fund ‘Kite Mark’?

A: When we assess application, we consider a range of factors including:

·                 whether the project is relevant to heritage in the UK

·                 the needs and opportunities the project will address

·                 how strongly the project will achieve our outcomes

·                 overall value for money

·                 potential risks to the project’s success

·                 approach to environmental sustainability

# Bilingual requirements

Q: Should translation costs be included or do you already work with a partner who the winning agency will then work with on the project.

A: Welsh translations can be done in-house, translation costs of additional languages can be expensed when agreed.

Q: In your brand guideline outputs on p.13 of your brief, would you be able to specify bilingual requirements?

A: This is outlined on page 9 of the brief.

Q: You mention requiring guidance on how to articulate when communicating bilingually in verbal contexts (e.g. phones) — do you have current examples of question/answer prompts or guidelines provided to your frontline staff?

A: This point in the brief relates to Wales, where a typical phone greeting is very long. We don’t script our frontline staff.

Q: Bilingual identity — is this in reference to reviewing the logo typeface to account for NI/Scotland/Wales?

Q. Can you be specific about what the scope should include with regards language requirements for Northern Ireland, Scotland and Wales. For example do you require fully bilingual versions of the guidelines to be produced, bilingual tone of voice documents, or just some relevant application examples

A: In answer to both questions above, we do not require bilingual versions of the guidelines or documents. We require the logo, to work bilingually, the intro line on the telephone and relevant applications.

Q: Is there a review process for the legal bilingual requirements?

A: We will need to test bilingual approaches in the relevant countries, we can do this in-house if the agency provides us with the material.

# Brief

Q: Why this brief now?

A: We want to create a more cohesive brand strategy and identity that adds value to supporting our ambitions and vision. The brief was already planned before COVID-19 and is largely driven by the need to make our brand work harder for us, so we retain and build on our leadership role in an increasingly competitive environment.

Q: What would success look like in two years from now. / What will be the key marker of success? / What shift in perception or usability will the output create? How will people see and talk about you differently as a result? What does success look like?

A: To the above questions.

* Realisation of our vision on page 7 of the brief.
* Brand platform to realise our potential.
* Give us an edge as a leader in the sector.
* More distinctive brand to standout and engage.

Q: What is the single most important difference that you would like this project to make to the organisation?

A: We need to make our brand work harder for us so we retain and build on our leadership role in an increasingly competitive environment. By harnessing our brand and creating a more cohesive brand strategy and identity, we will support our values and ambition.

Q: What is the most important challenge for us to be aware of?
A: Building a national brand that is locally relevant.

Q: Is this more of a brand strategy or a brand identity brief? Are you looking to validate the work done to date or start afresh?

A: This work involves both brand strategy and brand identity work. We are looking to start afresh but not change our name.

Q: Do you see this project requiring wholesale visual/verbal brand change or an evolution of the assets you have whilst building on and adding to those in a more creative way?

A: More wholesale visual/verbal brand change.

Q: The brief includes the following line: ‘develop our brand through a fit for future lens, so we can build on our leadership role’. Please could you confirm what you mean by this?

A: We are future thinking, beyond the current COVID-19 environment, and looking to position ourselves as leaders in the sector.

Q: It feels like you’re looking for an ‘endline’ exploration as well as a logo & name, is that correct?

A: This could be an important consideration in terms of a solution.

Q: Alongside the rebranding how important is the activation of it to you? Would it be part of a separate brief? Is there a plan for advocacy and raising internal awareness of the new brand once it is in place? Will this be part of the brief?

A: This will be worked through during the project, we have not yet agreed an action plan and it will be completed in-house.

Q: The brief doesn’t mention other logos that are available on the website, i.e. Parks for People, Great Place. What is the requirement in relation to these?

A: These are part of the brand hierarchy but no need to work on them more than this.

# Brand consultancy / brand strategy / research

Q: Is there any brand strategy work – other than the vision – that you would like us to build upon or are we starting from scratch?

A: There has been work carried out internally on our culture and values, a summary values with descriptors is included in the appendix. Other aspects of our culture and values work will be shared with shortlisted agencies before the virtual pitch.

Q: How are you embedding the values as part of your culture development work? Are you looking for further recommendations on how to embed the brand?

A: Bringing the values to life in a visual way is part of the brief page 7, we do not envisage extending this further into culture development work.

Q: The original brand strategy and the insights must have been informed by some insights can you share this?

A: No brand strategy work was undertaken, it was a tactical piece to update our name and align more to The National Lottery. We have no more relevant research/insight work to share.

Q: What are the active engagement activities that have been undertaken to develop greater understanding of the brand and its value?

A: These have not been undertaken.

Q: Are the four nations currently treated as different entities? If so, how? Or is it one cohesive national brand, playing out locally in four different nations?

A: It is the latter.

Q: Other than language use, how else does the brand need to flex across the four nations?

A: It needs to be authentic and reflect local context. It also needs to land well nationally and resonate in the countries.

Q: Why does there need to be a local vs national difference in the brand?

A: We operate a devolved nations/countries approach to our funding and operation.

# Brand identity

Q: You mention your current palette is limited and lacks character - could you expand on this a little, areas you’ve struggled using it within and why you feel it lacks character?

A: This will be part of the visual audit e.g. the colour palette is very limited, has accessibility issues with colour pairings and needs enhancing.

Q: In relation to the brand identity, we understand that the individual components - name and crossed fingers are fixed. The brand identity task is therefore to review the execution of these elements in line with the brand strategy to give the Heritage Fund its own unique personality, create versions of the identity that can be used as a stand-alone and abbreviate and apply the identity to a broader range of deliverables. Is this understanding correct and can you confirm to what degree we are bound by the Family National Lottery approach?

A: Yes this understanding of the visual identity brief is correct. There is a One National Lottery Expression document that will be provided to shortlisted agencies, we need to align with this but are not bound by it.

Q: Are you looking for new fonts?

A: We would be looking to explore this and ensure that they are readily accessible fonts.

Q: What are the touch points used for communicating with grantees? What is the level of messaging required.

A: Verbal short and long form of an elevator pitch, how they would explain our organisation and offer.

Q: Do you have a print partner who could provide colour proofs?

A: We do not currently have a print partner.

Q: The creation of the boards for the colour proof will depend on the work that comes out of the visual identity. Will there be a separate budget for this?

A: No but this is potentially an expense if it is required and agreed.

# Budget, VAT and expenses

Q: Please can you confirm that all expenses are out of scope.

A: See brief page 14, Section 5, Contract management: ’essential expenses are in addition and need to be clearly defined and agreed upfront.’

Q: If we challenge the budget that has been set will we be excluded from the process? Please could you clarify conditions for a fixed price.

A: The budget for the project is £60K plus VAT and expenses. We would prefer the full scope to be delivered within this. If this is not possible, agencies may outline what scope will be included.

Q: On the cost schedule, please can you clarify that your definition of ‘post’ is an individual resource type. For example, Consultant.

A: Yes, this is correct.

Q: Would there be any additional budget to cover research costs? Would you like us to share optional costs as a reference?

A: There is no additional budget for research costs. Please do not include.

Q: Can you provide any context around how you arrived at the budget for the project?
A: This sum was agreed by our board.

Q: Please can you confirm that the total fees column on the cost schedule will be exclusive of VAT. VAT will then be added underneath the table into the cost type section.

A: Yes, VAT is in addition.

Q: The payment schedule mentions payment on completion of deliverables. Is a small deposit to secure the work and team acceptable?

A: Yes, that is acceptable.

# Business strategy

Q: How do you articulate the value of The National Lottery Heritage Fund to the rest of the business at the present time?

A: Please see Our Corporate Strategy 2018-21 and Strategic Funding Framework 2019-2024 available to download on our website.

Q: The Corporate Strategy 2018-2021 was not referred to in the brief. Is it still relevant?

A: The Corporate Strategy 2018-21 is being refreshed this year and is still relevant.

Q: Are there social investment / loan models that you can point us to which you admire?

A: This is our approach but we are not in a position to point you to best practice examples.

Q: As you innovate in business models and move away from a straightforward ‘funding’ relationship, is there scope or appetite to think of yourselves as more than a ‘heritage fund’?

A: Our work will still cover the full breadth of heritage across sector. The way we define heritage is extremely broad.

Q: How often will you work with partners other than the National Lottery? i.e. How often do you envisage the stand-alone brand being used?

A: It is small at the moment, but has potential to grow in the future.

Q: Can you give us examples of other partners you see The National Lottery Heritage Fund working alongside or have you already piloted partnerships that you would like to point to as exemplar relationships?

A: Government and heritage organisations.

Q: Do you foresee Digital Skills playing a more significant role in heritage funding in the future? How important will it be for partners, applicants and grantees to demonstrate a grasp of digital skills?

A: Yes, digital skills will play a more significant role in heritage funding. We do want our funding to be accessible and part of our strategy is to build digital capability in our applicants.

Q: How far do you foresee ‘Heritage Recovery’ in the wake of COVID19 playing a significant role in the brand positioning and proposition from The National Lottery Heritage Fund?

A: Like many organisations we are in the middle of working out what COVID-19 means for the future and are working through our future scenarios. This discussion will be part of the project.

Q: As you move beyond grant funding into social investments and loans will you be working with a financial institution? Would you expect recipients to use your brand in these situations?

A: We have not been prescriptive at this early stage about the type of organisations we might work with in relation to new funding approaches. If we are working in partnership on new grant funding then we’d look to co-brand with the respective organisation/s concerned.

Q: Could you share your thought-leadership strategy – where, when and what do you do in this space?

A: We are yet to scope out our thought leadership strategy, but we are developing and testing approaches, which could harness both our own leaders and those within the heritage sector.

# Competitor audit

Q: Competitor audit: can we include in that some international peers?

A: Yes.

Q: Out of the competitors listed in the brief which do you feel are most successful in representing their brand and why?

A: This is part of the competitor audit in the brief.

Q: Should a global view be considered when developing the response, even though NLHF’s operation are UK-wide?

A: If there is key insights e.g. in the competitor audit from taking a global view that would be useful.

# Contract

Q: Will there be opportunity upon successful appointment to provide comment on the proposed contract to ensure it is acceptable for both parties.

A: Yes.

# Guidelines and templates

Q: Could you clarify that the style guide referenced in the appendix is the current guidelines that are 60% complete and be clear about what parts of the brand you are happy with at this stage.

A: Yes, the brand guidelines are the guidelines referred to. We are happy with The National Lottery fingers logo and dos and don'ts of its application.

Q: Should we assume that the work done on brand and guidelines does not reflect the values?

A: Yes, the guidelines do not reflect the values, as have been developed since then.

Q: Templates - how are these currently created? Word? Indesign? Are they created for a non-designer audience?

A: More a designer audience, but it would be helpful if there are tools that local teams can apply. Template format would also be dependent on application e.g. letterhead word, presentation Pptx, publication or other designed materials Indesign.

Q: You mention the requirement of core templates in phase 4 of your outline process — do you have a specific list of tools and templates you’ll require with the visual identity?

A: See page 11 in the brief as a suggested list that will need confirming once the identity is agreed.

Q: Would you consider two different brand guidelines, or at least an abridged version for recipients, who won’t be using a lot of the more technical/ internal guidelines?

A: Preference is for one cohesive set and an appendix to give to grant recipients/operational staff.

# In-house capability

Q: Do you have an in-house design/digital design team?

A: We do not have an in-house design team but we do have capability to implement the website re-skin. We may add internal design capability in 2021. Currently we use external agencies to create collateral and MarComms team create some in-house.

# Literature

Q: How much of your own literature do you typically produce in hard copy each year?

A: Very little, just the Annual Review, Strategic Funding Framework and engagement pieces, direction is to go more digital.

Q: How is literature currently designed and printed? Is work out-sourced to freelance designers or do you have an in-house designer? This will determine how master files are packaged and released?

A: Outsourced to designers, don’t have in-house design team at the minute.

# Masterclasses

Q: Are you able to share an exec summary of the outputs from the online brand masterclasses; the what, why and how and the personality?

A: This was to raise awareness of brand internally and build brand advocates. Sessions were done on brand archetypes only, the brand personality has not been defined and this is part of the work. The outputs of the brand masterclasses will be shared with shortlisted agencies.

Q: Do you envisage the appointed brand agency will work with external brand consultant or would the external brand consultant hand over to the brand agency?

A: The external brand consultant was appointed for internal engagement, to develop the brief and help run the pitch. They will handover to The National Lottery Heritage Fund and appointed agency and not be involved further.

Q: You describe the content of the masterclasses as what why how often branding. Is our understanding correct that this is about brand education over brand discovery about what you stand for, your personality etc?

A: These were more brand education with some brand discovery by exploration of personality using brand archetypes.

Q: Following the internal workshops and masterclasses, how is the understanding of brand in the organisation?

A: We are on a journey and are shifting from seing brand as logo to a strategic piece that can make a difference.

# One National Lottery Expression

Q: Are there any National Lottery brand guidelines that we must adhere to that provide guidance for the application of their brand? Are these available for us to review?

A: There is One National Lottery Expression document we need to align to but are not bound by, this will be shared with shortlisted agencies.

# Photography

Q: Do you have an existing image library for us to work with or can we presume that you would be happy to commission new photography in our recommended style in the future?

A: Yes we have and yes we would be happy to commission new photography.

Q: Can you explain a bit more about the photographic requirements – would you like a uniform photographic style from recipients?

A: We would like examples to direct grantees to produce self-generated photographic content and requirements to address diversity of quality received, then photographic direction for professionally shot photography.

# Portfolio and hierarchy

Q: To what extent are you looking to differentiate the ‘Heritage Fund’ from the ‘National Lottery’?

A: This is to be explored as part of the brief, how to define ourselves as distributors of National Lottery funding and be distinct from them.

Q: The logo is tightly tied to The National Lottery Community Fund. How closely tied should the brand be with other Lottery grant brands? Do the Community Fund intend to revise their brand? Is there a strategic requirement for the two to be aligned?

A: The National Lottery Community Fund have already completed their branding, we do not need to align further. The One National Lottery Expression document will be made available to shortlisted entries.

Q: The relationship between National Lottery, Heritage Fund, Community Fund and other organisations is a key consideration. The brief doesn’t mention engagement with these organisations. Will this be possible or encouraged?

A: We are not looking to further engage with The National Lottery Community Fund but we will look to engage with The National Lottery(we will handle this engagement). We are The Heritage Fund.

# Previous name and logo change

Q: Why are you not completing the work that has already been started?

A: In effect we are completing the work that has already been started but we are looking to create a more robust brand and guidelines that will drive greater buy-in from our internal and external stakeholders.

Q: In the development of the brand to date, which aspects are you happy with and which aspects do you feel are not working (if any)?

A: We are happy with the use of the National Lottery fingers logo and do’s and don’ts of its application. The colour palette is not currently working, we don’t have a good selection of templates (particularly digital applications), and access to the chosen fonts is limited.

Q: What was the background behind adding national to the name last year?

A: We were looking to better identify with our funding sources from The National Lottery. We were also looking to reaffirm our position as a UK-wide dedicated funder of heritage.

# Process

Q:Please confirm whether all day-to-day engagement will be through the listed Project Lead, including to set up initiatives like stakeholder workshops?

A: Yes, Project Management with Susannah Evans and Project Lead Jill Cochrane.

Q: Are you anticipating pausing to accommodate research between June and October?

A: We are anticipating accommodating the internal and stakeholder research and rest of the project within this timeframe.

Q: Has COVID-19 affected the project’s timings? Are you anticipating extending the tender submission deadline or project completion date?

A: COVID-19 delayed us slightly as we developed our response. We do not anticipate further delay but there isn’t a hard deadline, so project could be extended slightly if required.

Q: Are there any pre-determined milestones for leadership meetings / executive board meetings that we should consider at this initial pitch stage and factor into our timings?

A: Our Board and Executive meet regularly, so in scheduling the project with the preferred agency we would look to identify the best timings to engage these groups.

Q: Do you have a preferred platform for virtual meetings?

A: We use Teams (Office 365).

Q: How do you sign off creative/design work? Will it be a small group, or have numerous stakeholders involved?

A: Sign off will be by core working team, executive team and Chair.

Q: Should we expect a review process with external audiences, including government or heritage sector bodies?

A: Out of courtesy, we’d brief key external stakeholders about the work, but we would do this as part of our business as usual activity.

Q: Are you open to different approaches to running the project, which would differ from what you outline?

A: We are open to suggestions on methodology.

Q. In developing a methodology for stakeholder engagement it will be helpful for bidders to understand which methods from those already undertaken have been most successful from NLHF’s point of view. Is there any scope for bidders to have a call with NLHF in advance of the bid submission, or can more information be provided in a document to all bidders?

A: In context of Covid-19, The National Lottery Heritage Fund staff are spending long periods on Teams (Office 365) which can be exhausting. So anything interactive or a bit fun is more engaging. We are not undertaking calls with any individual bidder.

Q: Are we right in assuming that collaboration, co-creation and workshopping ideas will be an important part of the process and response?

A: We are happy to do online workshops are part of the process alongside other methods of engagement and developing the brand.

# Research

Q: The brief mentions some exploration of brand personality. How far has this gone?

A: Only personality archetypes have been explored, the personality still needs to be defined.

Q: You refer to the brand equity of The National Lottery and previous Heritage Lottery Fund. What current data exists (quantitative or qualitative)?

A: No data exists on this.

Q: Do you have any research into the role that visual co-branding plays in ensuring that increased awareness leads to a recognition amongst players of the National Lottery that their participation has directly led to the funding to important projects and programmes?

A: We do not currently hold data on this.

Q: Does the 2018 YouGov survey allow you to break down responses by age and other important factors e.g. family vs individuals? And would it be possible to see the full debrief from this research?

A: We are not giving out any insights at this stage but we will supply shortlisted agencies with this information.

Q: Are you able to share any research (e.g. tracking covering awareness, understanding and perceptions, stakeholder insight – allies and critical friends)?

A: We do not have more research to share.

Q: What research/insight has the work to date been based upon?

A: We have no more relevant research/insight work to share.

Q Do you have any insight or learning on branding from the other 11 National Lottery funders, in particular the National Lottery Community Fund? How do they manage their branding with their recipients?

A: We are not in a position to share anything at this stage.

Q: Similarly, do you have any insight from other heritage funders and do you have any formal arrangements if you are funding the same project when it comes to recipient’s multiple branding?

A: We don’t have insights from other heritage funders. There are no formal arrangements in place with other funders, that’s why the architecture and hierarchy is key, plus how we establish a more robust to co-branding with partners.

Q: Do you have any research on public awareness and attitudes towards The National Lottery Heritage Fund/Heritage Lottery Fund? (We assume awareness of fingers crossed icon is very high).

A We have never undertaken any public awareness or attitudinal research, but your assumption is right, awareness of the crossed fingers is high.

# Stakeholder engagement

Q: Do you have a view on the % priority split between internal and external audiences?

A: Happy for you to give a recommendation on this as part of your methodology within the given scope on numbers of interviews.

Q: For stakeholder activities (in light of COVID-19 restrictions), are you happy for us to include a largely digital programme of engagement?

A: Yes, given the circumstances we are anticipating a largely digital programme of engagement, particularly in the early research phases. However, allowance should be made for meetings later in the process if circumstances allow.

Q: Has any effort been made to foster community between recipients? E.g. dinners, online spaces?

A: We host stakeholder events as part of our role, we also used to run an online community.

Q: How do you think your brand is currently perceived? Do you have an insight into how recipients think about the fund and their attitudes towards you as an organisation or brand?

Q: What is your impression of what your critical friends think about the work that you do and how you are positioned?

A: We do not have any brand insights.

## Stakeholder engagement (internal)

Q: How do you engage with staff generally? What channels, tools, etc. are available?

A: Active internal comms and staff engagement, established channels include a weekly staff newsletter, intranet and executive board updates.

Q: Can you provide further details of what is meant by online workshops? Is this a workshop conducted over video conference or an online questionnaire?

A: Workshop conducted over video conference.

Q: What activities have you undertaken internally concerning your values? How have they gone down?

A: We have undertaken a significant programme of internal engagement to develop our values and it has been well received.

Q: Are you happy for employees to participate in the research phase?

A: Yes, employees and internal stakeholders are to be part of the research phase as outlined in the brief.

Q: Please could you confirm that you are happy to co-ordinate and recruit all the relevant working groups and stakeholders throughout the brand project.

A: Yes this co-ordination will be provided by The National Lottery Heritage Fund team.

Q: Are you happy that the working groups identified in the brief represent a cross-section of your organisation and can be used as an established group for testing purposes? Would The National Lottery be happy to conduct this research with stimulus provided by the chosen agency?

A: These working groups do represent a cross-section of our organisation, we are expecting the appointed agency to undertake any research with them.

Q: When you talk about ideas to bring this to life for staff we assume that you will only want written thoughts and not visual applications?

A: See the brief page 9, where bringing our values to life is one of the visual applications we have outlined.

Q: Engagement groups — is ‘Executive’, Chief Executive?

A: We have an Executive Team, Chief Executive and Chair, see the profiles of all on our website.

# Submission and shortlist

Q: Are you capping the number of participants in the competition? How many do you intend to shortlist?

A: As a public body we are running the tender via the Government’s contract finder. The pitch will be open to all and not capped. We intend to shortlist three agencies.Q: How should we respond to the tender?

A: Please email a document or link to Jill Cochrane, Jill.Cochrane@heritagefund.org.uk by noon on 6 May 2020.

Q: Are there any guidelines on the format of the submission – including word limits and document format. Should the responses be submitted as separate files?

A: See tender document page 18. You can email a downloadable link or attach a Ppt or pdf. Submissions can be landscape or portrait. Responses should be in one file as far as possible. There are no word count limits but we expect applications to be succinct.

Q: Table A: can this be supplied as a separate spreadsheet?

A: Yes.

Q: Will you be expecting creative ideas as part of the submission? Do you have visual or written ideas in mind? Is there room to be creative with some of the ‘essay style’ questions?

A: We would like to see some creative ideas but note we are not asking for creative work and visualisation. We are looking for written ideas.

Q: You should not submit additional assumptions with your pricing submission’ can you clarify what is meant by this please?

A: Bidders should base their pricing on the information with the ITT and files attached.

Q: There seem to be multiple versions of the contract attachments. Can you confirm which versions we should be looking at please?

A: The only difference in the documents is to send your submission to Jill Cochrane directly: Jill.Cochrane@heritagefund.org.uk

# Tone of voice

Q: Do people use your current tone of voice? How do they feel about it?

A: Our tone of voice hasn’t been embedded, we are looking for it to be clearer and updated to reflect the personality.

Q: You specify the following deliverable with Tone of Voice: “How to articulate when communicating bilingually, especially in verbal contexts e.g. phone”. Can you confirm what you expect from this point? Is this to add to the style guide? What level of detail would be required in your view?

A: This refers to finding a solution to how we verbalise/use our name in different contexts – such as on the phone, presentations, reports etc. We would look to clarify these messages through a digestible set of guidelines for use by all.

Q: 'Word pool' — is this a grab bag of messages? Or appropriate words to use?

A: This is an inspirational ‘grab bag of messages’.

# Website

Q: You have requested 2-3 website page templates. Is the expectation to demonstrate visual references in situ, or is there a requirement for detailed website UX and UI as part of a wider website design?

A: No detailed UX and UI required. We are looking to apply brand identity on 2-3 website pages, implemented in-house using the existing CMS.

Q: Can you confirm that the website reskin (in terms of actual application to the website, rather than just showcasing indicative design) does not need to be included.

A: The website re-skin needs to be included in terms of giving enough direction so our internal team can implement the design.

Q: The National Lottery Community Fund uses ‘tnl’ in their url – do you have plans to make similar changes?
A: There are no plans to change our url.

Q: Assuming you have no appetite to change the URL heritagefund.org.uk or socials @HeritageFundUK . What impact does this have on naming requirements?

A: The url names are not part of the brief.