**Tender Brief for Marketing and Communications Project – Chelsea History Festival**

1. **Summary and overview of services required:**

The National Army Museum, on behalf of the Chelsea History Festival is looking to appoint a suitable partner to work with the Chelsea History Festival and in-house programme team of the National Army Museum to produce and deliver an integrated marketing and communications plan which generates coverage, drives footfall and ticket sales to the Festival whilst also building awareness of the festival for future years.

If you are interested in tendering for this interesting project, this document provides the following information:

* Background on the Chelsea History Festival
* Scope of services
* Budget
* Indicative timescale
* Tender process
* Appendices
* Annexes
1. **Background**

**2.1 The Chelsea History Festival**

The Chelsea History Festival launched in 2019 as an annual festival with the aim of bringing the past to life through a programme of world-class speakers, historians and performers. Hosted along the Royal Hospital Road, at the Festival’s founding partners’ venues - the National Army Museum, the Royal Hospital Chelsea and Chelsea Physic Garden. The first year saw over 10,000 people attend the Festival and its diverse programme over five days.

The Festival returned in 2020 - with the challenge of delivering a festival in the midst of the global pandemic, the Chelsea History Festival produced a mixed physical and digital programme, allowing the festival to connect with a wider, global audience whilst also delivering events at the National Army Museum and Chelsea Physic Garden. The festival programme reached over 20,000 people worldwide and 2,000 to the venues and associated programme.

This year the Festival returns, running from the 22 – 26 Sep 2021 with the aim of bringing people back safely to the Royal Hospital Road and the mission of creating a stage in the heart of Chelsea for world class speakers, authors and performers who entertain, inspire and educate through the power of local, national and global history. In addition to its speaker programme the festival will grow its outdoor offer in order to appeal to a wider audience of families, history lovers and supporters from the local community. The Festival will also maintain a digital programme this year – although the scale of this will reduced to that of produced in 2020.

**2.2 2021 Target Audiences**

The appointed company will utilise the National Army Museum’s audience segmentation model (see Appendix 1) to develop and shape the integrated Marketing and Communications Plan for the Festival.

The Festival programme will appeal to audiences across the segmentation model, however the key segments which we seek to target for this year’s festival are:

* Historians – Enthusiasts, Military Detectives and History Lovers
* Generalists – Love to Learn
* Transactors – For the Kids

We would like to attract both new audiences and previous attendees to the Festival. Families will also be an important focus as will attracting attendees of the Chelsea Flower Show, the dates of which co-incide with the Festival.

In 2019, 80% of audiences who attended were from London and this year the Festival seeks to increase its reach of physical audiences to areas outside of London, such as the South East and Kent which have good transport links into London.

**2.3 Current Assets**

The Festival updated its design in 2020 and will look to use the creative in this year’s Festival. The successful company will be provided with the following assets on appointment:

Brand guidelines, including logo usage, fonts, brand colours

2020 Branded Social Media asset templates

2020 Screen templates

2020 Promotional video

2020 Videography, including festival summary video and general footage of the 2020 Festival

2019 Festival summary video

**2.4 Partner and Sponsor Requirements**

The appointed contractor will lead the Marketing and Communications working group for the festival which includes representatives from the founding partners of the Festival. As a joint venture, these 3 organisations have acknowledgement requirements which need to be met and there will be a sign-off process in place with these partners before marketing and communications materials can be released. In addition, the founding partners will work with the appointed contractor to assist in promoting the Festival through their owned channels.

The Festival will have a lead sponsor, the contract and requirements of the sponsor will be in place and signed before this contract is awarded and therefore the Marketing and Communications Plan will need to consider these contractual obligations and work with the National Army Museum’s Philanthropy Manager and Assistant Director (Enterprise) as well as the Festival Director to ensure these needs are met.

Other partnership requirements will be briefed to the appointed contractor on commencement of the project.

# Scope of Services

**3.1 Marketing support**

Jun 2021 – End Oct 2021 tbc

There are 2 aims for the marketing campaign for the Festival this year. The first is to drive tickets sales and footfall to the Festival through an integrated Marketing Plan. The second to use its owned channels (email and social, the latter was established in 2020) to build awareness and our following for future years.

Marketing Planning and Strategy

* Develop the 2021 Key Messages - working with the Festival Director and the National Army Museum’s Public Programme Manager and Assistant Director (Enterprise) to develop key messages for the phases of planned activity (see 3.3)
* Join a kick-off meeting with Marketing representatives of each founding partner to discuss messaging and approach
* Produce a costed integrated marketing plan from ticket launch to close of event, including owned, earned and paid for channels. Working with the National Army Museum’s Assistant Director (Enterprise) and where advantageous the National Army Museum’s external Media Buying agency

Marketing Delivery

* Copy-writing for all marketing materials across all channels, including for use on Festival website in support of the marketing plan. Including the development/tailoring of copy in line with the key messages at each phase of the project
* Oversight and delivery of all design assets, including advertising materials (print and digital) in support of the marketing plan
* Design and production of event signage/materials to support the festival areas promotional banners, venue signage etc.)
* Liaison with external stakeholders as required, and management of partner marketing requirements

Owned Media Channel Management

* Produce and manage the content strategy to raise awareness and grow audiences
* Manage the content creation, delivery and scheduling of all social and email communications in support of the content strategy
* Actively manage enquiries on social media channels, working with the National Army Museum team and the Festival’s external Ticketing Partner where required

**3.2 PR support**

Jun 2021 – End Oct tbc 2021

The aim of the media relations campaign for the Festival will be to secure quality coverage with history, military and London media raising the profile for Chelsea History Festival and its 2021 programme. We are also keen to capitalise on connections with the programme and the RHS Chelsea Flower Show which is running alongside the Festival’s dates.

Planning & Strategy

* Identify key media targets working with the National Army Museum’s Public Programme Manager and Audience Research and Development Manager
* Develop Q&A to anticipate any difficult questions related to the Festival
* Join a kick-off meeting with PR representatives of each founding partner to discuss messaging and approach

Media Relations

* Draft and issue press release for the launch of this year’s Festival, working with the National Army Museum’s Festival Programme Manager, Assistant Director (Enterprise) and the Festival Director
* Proactive media relations campaign based on targets identified in planning phase across local, broadcast and history specialist media
* Discuss relevant photo opportunities and if required issue a photo-call notice
* Liaise with relevant spokespeople ahead of interviews and provide a full brief in advance
* If appropriate, identify journalists to invite to elements of the programme as guests and issue invites on CHF’s behalf

**3.3 Phasing of Work**

We are seeking a phased approach to our marketing and communications plan and as such have provided an outline suggestion of the phases of the project:

Phase 1: 28 Jun 2021

* This will be the launch of the 2021 Festival, 10 headline acts announced and first tranche of tickets will go on sale.

Phase 2: Jul 2021

* Awareness building

Phase 3: End Aug – 26 Oct tbc 2021

* Final acts announced, all tickets on sale

The Museum requires each tender submission to include a proposed approach to each phase and scope of the work, associated budget, timescale and detailed deliverables.

Where appropriate, please include examples of outputs and deliverables.

# 4. Budget

# This work will have a maximum budget of £19k, to include all work as outlined above with the exception of:

* Media Spend: A separate budget will be allocated for this.
* Design Fees: These fees should considered when developing the marketing and communications plan and will be included within the budget for media spend

Quoted fees must include all elements as identified in the Scope of Services. These should also include the following:

1. Professional fees
2. Development costs
3. Travel and expenses
4. Accommodation
5. Disbursements
6. Visuals
7. An estimate of any contingency
8. All third-party fees
9. Report, printing and presentation costs
10. All other expenses and costs required in the delivery of the project.
11. The fees should exclude VAT.

**5. Timetable**

The following timetable is indicative only and should be used as a guide to delivery.

|  |  |
| --- | --- |
| Publish tender – tender live | 17 May 21 |
| Close tender | 28 May 21 |
| Shortlist partners and invite to present | 28 May 21 |
| Presentations and interviews  | 03 Jun 21 |
| Appoint partner | 04 Jun 21 |
| Commence project | 07 Jun 21 |

**6. Tender process**

**6.1 Tender requirements**

1. **Response to the brief should demonstrate:**
* An understanding of the Chelsea History Festival
	+ An outline and examples of how you would approach the scope of work and your proposed approach
* Evidence of working on a project similar in scope to this brief
* Evidence of working with designers both in house and out-sourced
* An outline work plan identifying key dates of all elements and sign off points
* Identification of team members, including sub-contractors if relevant
* Name and contact details of two clients with whom the agency has worked with recently who could be approached for references before confirmation of appointment.
* Fee proposals: the fee is to be a fixed lump sum for the agency(ies) in the provision of the relevant project strands as outlined in the Scope of Services.
* Submissions will be shortlisted and those selected will be interviewed and their tender proposal explored further.

**b. Insurance**

Please provide copies of up-to-date insurance – the Museum requires Public Liability minimum of £1 million, Employers Liability of £1 million and Professional Indemnity Insurance to the value of £1 million.

**c. Financial**

Please provide a copy of the company’s published accounts for the last three years.

**d. All company documentation as requested below:**

* Annex A - The Completed Form of Tender;
* Annex B - Certificate of Bona-Fide Tender;
* Both forms (Annex A & B) should be signed by the Tenderer or, in the case of a Company by the Secretary or other authorised person.
* Annex C – Supplier Statement.

**6.2 Tender return**

All tender documents/electronic media are to be addressed to Secretariat or tenders@nam.ac.uk and annotated with “**Marketing and Communications Project – Chelsea History Festival 2021”** 12 noon on Fri 28 May. On no account are the tender documents to be passed to the requesting department before the tender board date.

Hard copy tenders are requested for reference but are not essential and can follow after the electronic submission.

Address for the return of hard copy tenders:

Secretariat

National Army Museum

Royal Hospital Road

Chelsea

London

SW3 4HT

Tenders can also be returned via email at the above date and time to: tenders@nam.ac.uk. The subject of the email should state**.**

**6.3 Tendering costs**

The Museum will not be responsible for or pay for any costs or expenses that are incurred by any tendering consultant in preparing and submitting their tender. Tenders are to remain open for acceptance for a period of 60 days.

**6.4 Contract award criteria**

The tender board will comprise of the following representatives of National Army Museum:

* Assistant Director: Enterprise
* Public Programme Manager

The board will also include the following representative of the Chelsea History Festival

* Festival Director

Subsequent interviews panel attendees will be confirmed after shortlisting stage

Tenders will be assessed on the following criteria:

* Response to brief 40%
* Fee 30%
* Relevant experience and project team 30%

Each proposal will be given a score. A proposal considered to be unsuitable shall be rejected at this stage if it does not respond to important aspects of the brief. National Army Museum shall notify unsuccessful tenderers of the rejection of their proposal after completing the selection process.

Tenders will be awarded on the absolute discretion of the Board of National Army Museum, in accordance with internal policies and statutory regulations. The Museum is not required to accept the lowest priced tender.

The decision will be final and binding, no correspondence will be entered into.

**6.5 Enquiries**

Any enquiries arising from this Invitation to Tender must be submitted in writing via email to:

Dawn Watkins, Assistant Director (Enterprise) National Army Museum

Email: dwatkins@nam.ac.uk

Enquiries should be submitted between 18 and 21 May. Enquiries will be collated and answered on Mon 24 May. All enquires and responses will be shared with all tenderers expressing an interest or raising an enquiry relating to the project.

**ANNEX A – Form of Tender**

Tender for: **Marketing and Communications Project**

To: The Council and Director of the National Army Museum

Sirs,

I/We the undersigned, having examined the enclosed tender documents and Appendices, do hereby offer to execute and complete in accordance with the said documents the works described therein:

For the sum as listed in the attached document:

Tenderer Reference:

I/We hereby affirm our agreement to enter into a contract with the Council of the National Army Museum for the due performance of the Works in the form described by the above said documents.

I/We have completed the Certificate of Bona-Fide Tender included in this document

I/We understand that the Trustees are not bound to accept the lowest or any tender which may be received nor or responsible for any cost incurred in the preparation of any tender

I/We declare that this offer is to remain open for acceptance for a period of thirty days from the date fixed for the receipt of tenders

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

In the capacity of

Duly authorised to sign the tender on behalf of:

Date:

**ANNEX B – CERTIFICATE OF BONA-FIDE TENDER**

Tender for: **Marketing and Communications Project**

I/We certify that this is a bona-fide tender and that I/we have not fixed or adjusted the amount thereof by or under in accordance with any agreement or arrangement with any other person.

I/We also certify that I/We have not done and I/We undertake that I/we will not do at any time any of the following acts:

* 1. Communicate to a person other than the person calling for these tenders the amount or approximate amount of the proposed tender except where the disclosure, in confidence, of such amount(s) was necessary to obtain insurance premium quotations required for the preparation of the tender.
	2. Enter into any agreement or arrangement with any other person that he shall refrain from tendering or as to the amount of any tender to be submitted;
	3. Offer or pay or give or agree to pay or give any sum of money or valuable consideration directly or indirectly to any person for doing or having done or causing or have caused to be done in relation to any other tender or proposed tender for the said work any act or thing of the sort described above.

In this certificate the word “person” includes any person and any body, association, corporate or un-incorporated; and “any agreement” includes such transaction, formal or informal, and whether legally binding or not.

Signed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

In the capacity of

Duly authorised to sign the tender on behalf of:

Date:

**ANNEX c – Supplier Statement**

Tender for: **Marketing and Communications Project**

We certify that the information supplied is accurate to the best of our knowledge and that we accept the conditions and undertakings requested in the assessment. We understand that false information could result in our exclusion from the Tender process or the Approved Suppliers List at any time, even after initial inclusion. We also understand that it is a criminal offence to give or offer any gift or consideration whatsoever as an inducement or reward to any servant of a public body and that any such action will empower such body to cancel any contract currently in force and will result in exclusion from the Tender and / or the Approved Suppliers List.

Signed by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name: (in BLOCK LETTERS) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

for and on behalf of**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

This form should be signed by a Director, Partner or other authorised signatory of the organisation and returned as part of the Tender Response

**AppendICES**

Appendix 1 – National Army Museum Audience Segmentation Model

|  |  |  |
| --- | --- | --- |
| **Category** | Segment | Description |
| Educators | School Influencers | Headmasters, senior teaching staff and key decision makers who want to know about the Museum’s educational offering. |
| Eager Teachers | The broader teaching and support staff, who are always searching for unique and educational experiences for students. |
| Inspired Kids | These are school children who don’t know much about the Army |
| Historian | Enthusiasts  | They know their area of military history inside out and may be amateur historians, authors or self-professed experts. |
| Military Detective | Interested in a specific aspect or period of the Army’s history, they are academic and looking for opportunities to delve into quality material and hunt for specific military stories. |
| History Lovers | For History Lovers, military history may only be one part of a larger historical puzzle. |
| Identifiers | The Army | Serving Army and veterans at home and abroad who get enjoyment from hearing true stories about soldiers’ experiences and the Army’s history. |
| Connected Families | Connected Families share specific interests andemotional connections to the Army. |
| Patriots | Proud supporters of the Army who want to hear extraordinary stories about ordinary people risking their lives for our country, both at home and abroad. |
| Generalists | Love to Learns | These ‘classic’ museum visitors like to be in the know and are always on the lookout for new experiencesfor themselves, their families and their friends. |
| Pop-in Locals | A cultured group living in or around Chelsea, who arealways looking for opportunities to explore new attractions in the city. |
| Experience Seekers | Although they have little to no prior experience of the Army this group are always on the lookout for the next new thing and enjoy experiential learning opportunities. |
| Transactors | For The Kids | Parents, guardians and nannies who come here to entertain their children using Play Base, or in theCafé or Shop. They see the Museum as a social outlet for the family, |
| Café Set | Visitors who predominantly just visit the Café and/or Shop in order to catch up with friends and family. |
| Venue Bookers | Private, public and commercial individuals or companies requiring facilities for events and meetings. |