



Invitation to Tender

Audience Insights Research

Ref: NHMF 318

Schedule 2

Specification

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SECTION 1 – SPECIFIC REQUIREMENTS OF THE SPECIFICATION 1

1 Background

The National Lottery Heritage Fund was set up in 1994 to give grants to a wide range of projects involving the local, regional and national heritage of the United Kingdom. We distribute a share of the money raised by the National Lottery for Good Causes. We allocate grants to projects in England, Northern Ireland, Scotland and Wales and since 1994, we have awarded £8billion to more than 40,000 projects. We allocate funding across the breadth of the heritage sector – for buildings, museums, natural heritage and the heritage of cultural traditions and memories. For additional background on the National Lottery Heritage Fund please visit www.heritagefund.org.uk

As the UK's leading funder of heritage, our work to engage with, to fund, and to support and advocate for heritage involves communication with a wide range of diverse audiences and stakeholders. Engagement takes place at individual, organisational, and governmental levels and across a range of different channels and platforms.

Communication with these different audiences must be carefully coordinated and managed to ensure that we achieve the maximum impact from the resource and opportunities available to us. Audience insight – through which we gain and maintain our knowledge of the preferences and needs of each of our different audiences – is vital to enable the effective planning and delivery of our marketing and communications activity.

Audience insight enables us to:

- understand and respond appropriately to the needs and preferences of the audiences we are already engaged with
- understand and reach out to the audiences we are not yet engaged with

Audience insight specifically supports the delivery of the three key objectives of the Marketing and Communications team to:

- 1. Increase awareness of the contribution made by, and availability of, National Lottery, and grant-in-aid, funding for heritage.**
- 2. Drive understanding of heritage, its value, and the difference it makes to people's lives.**
- 3. Build and protect The National Lottery Heritage Fund's brand and reputation.**

We have a number of existing mechanisms for understanding our reach, most significantly the regular monitoring of engagement by the Marketing and Communications team and the commissioning of relevant pieces of research by the Research, Data and Insight team to understand the specific nature, needs and perceptions of different audience groups.

We are revising our approach to audience insight to bring together a comprehensive understanding of our different audience groups and apply this understanding within our monitoring activity so that we can have continuous access to meaningful and up-to-date information on our audiences.

Our audiences can be understood as two different groups:

Primary audiences – the heritage sector

Our main function is as a distributor of funding to the heritage sector and therefore our primary audiences are potential **applicants** who will seek funding from us and **sector stakeholders** and partners who will help us to distribute our funding. It is essential that we understand the nature and needs of these audiences in order for us to deliver funding programmes and to raise awareness of our offers. The primary audience is further divided into two sub groups:

1. **Applicants** – This grouping includes all organisations who could potentially apply to us for funding as well as those already engaged at all stages of the application and award process. Applicant organisations vary in size and nature – for example, from traditional museums and historic sites functioning as visitor attractions, to local councils managing parks and landscapes, to independent social enterprise projects, to small scale voluntary organisations and networks using heritage to connect with and support their local communities. The projects we fund use heritage in a variety of ways to deliver different benefits, for more information on our funding outcomes please visit www.heritagefund.org.uk/funding/outcomes

This research should consider existing applicants but also potential applicants, including all types of organisations – from within and beyond the traditional heritage sector – who may be able to benefit from our funding.

2. **Sector stakeholders** – This grouping includes organisations and networks that form and support the wider heritage ecosystem – partners, sector support bodies, other Arms Length Bodies. This group should not include MPs and political stakeholders who are covered separately by our policy research.

This research should consider establish partners but also all stakeholders – from within and beyond the traditional heritage sector – who may be able to support us and collaborate with us in the delivery of our work.

Secondary audiences – the general public

The ultimate purpose of our funding is to deliver public benefit and, whilst direct engagement with **public audiences** occurs mostly via our grantees, it is still important for us to have a good understanding of the nature and needs of the beneficiaries of our work in order for us to design funding programmes appropriately and to gain support for our work.

Further information on sources of knowledge on these audiences is detailed in **3. Method of Delivery**.

2 Aims & Objectives

The aim of this research is to review our audiences and design a segmentation system for our primary audiences, that will enable us to better understand and respond to the needs and preferences of different audience groups and give us the ability to monitor our engagement with these groups over time.

The research will achieve the following outcomes:

- The Heritage Fund can **identify the different audiences it engages** with, and clearly understand the unique and distinct characteristics and needs of each audience.
- Heritage Fund **staff understand the relevance of audience segmentation**, and how the segmentation can be **used within their individual areas of work** to improve their communication with different audiences.
- The Heritage Fund can **monitor levels of engagement** with different audience segments as part of regular organisational reporting, and is able to focus on outcomes (nature and quality of engagement) rather than outputs (volume of engagement).
- The Heritage Fund has **insight into the perceptions of each audience segment** of the organisation brand, and has **appropriate tools for continuous monitoring** of brand awareness.
- The Heritage Fund understands the **options for expanding and improving** the audience segmentation approach in the future and is able to **share the insights and audience segmentation systems with sector partners**.

The audience segmentation system must have practical applications and must be future-proof. It must use measures already existing, or easily added to, business-as-usual processes and systems to enable its continued use and update following the completion of this research. The research deliverables will include supporting materials to ensure staff are confident in the use and further development of the approach.

The focus is our primary audiences – potential applicants for our funding and sector stakeholders across the UK. Where possible the work will also incorporate segmentation of public audiences.

We expect this work to require separate consideration of our primary audiences (sector) and secondary audiences (public) but require these audiences to be brought together as part of a single coherent approach, with a focus on our primary audiences. We understand the nature of segmentation as continually evolving. This initial research will set out a proposal for a segmentation which can be tested and iterated. Within the final audience segmentation resulting from this research, it is likely there will be varying levels of detail and evidence behind each segment; there will be some segments about which we have strong knowledge and others about which we have limited knowledge which we will seek to build on in the future.

3 Method of Delivery

We expect the successful supplier to be able to think creatively and take an approach to audience segmentation that draws on relevant qualitative and quantitative sources.

The audience segmentation will require analysis of our existing data and may also benefit from targeted research to understand our audiences. The segmentation can be informed by other relevant sources of insight from across the breadth of the sector and the breadth of the UK. Prior to the appointment of the consultant, a callout will be issued via area and policy teams to gather appropriate sources of information and invite contributions. New research will be required to investigate known audience gaps and new gaps that are identified through analysis of our existing data, and to provide more detailed information on specific audience segments as they emerge.

We expect the research should start with an exploratory phase reviewing Heritage Fund data and existing sources of relevant information.

The research should take a staged and iterative approach and make careful use of our existing data to avoid any repeat surveying of audiences the Heritage Fund already has strong knowledge of and to make best use of resources by focusing on investigating audiences where knowledge is limited or where gaps have been identified.

The research should look at and bring together:

- profile and engagement (who they are, how are they interacting with us)
- attitudes (what do they think of and expect from us)

We expect bidders to put forward proposals for the type and approach to profiling they anticipate would be most beneficial to meet our aims and objectives.

Sources of information:

We do not have an existing audience segmentation system. More information about our work is included in Appendix I and can also be found on our website.

More information about the heritage types is available here:

<https://www.heritagefund.org.uk/our-work>

More information about the types of projects we fund is available here:

<https://www.heritagefund.org.uk/funding/what-we-fund>

The data and source materials available to support the research will include:

- Sector research and segmentation systems (to be provided on appointment):
- Audiences in Focus, Historic England segmentation 2019
- Camelot Lottery Players segmentation and personas 2019
- Website user research and personas 2017
- The People and Nature Survey, Natural England 2022
- RSA Heritage Index
- Additional materials to be confirmed following sector callout

Data sources:

- E-newsletter data (DotDigital) c. 15,000 contacts
- Web analytics – Matomo
- Social media (Twitter, Facebook, Instagram, LinkedIn) monitored by Pulsar
- Applicant data (National Lottery Heritage Fund Investment Management System) data requirements to be discussed on appointment of successful bidder, as appropriate to their proposal
- Heritage Pulse data – please see <https://heritagepulse.insights-alliance.com/>

We collect our applicant data through a customer relationship and grant management system, as well as managing a data warehouse to consolidate and report on our applicant data. Additionally, we publish a wide range of our grant data to several external platforms. You can find out more about our commitment to open data here: <https://www.heritagefund.org.uk/about/insight/open-data>

You can access our open data here:

[360Giving: National Lottery Heritage Fund Grants](#)

[DCMS: National Lottery Grants](#)

Additional details, as relevant to the proposed methodology, will be provided to the successful bidder on appointment.

Heritage Fund Research that can support understanding of our audiences:

- Strategy Development Research 2022 – current, ongoing
- Equality, Diversity and Inclusion Research 2022 (complete, awaiting publication)
- Strategic Funding Framework stakeholder consultation 2020
- Public Perceptions of Heritage Research 2018

We would like consultants to set out proposals for a detailed methodology. We expect bidders to put forward proposals setting out their approach to working with our data and research resources and identifying and fulfilling further research needs and outlining how they would approach the development of the audience segmentation system and related guidance and tools.

4 Outputs, Outcomes, & Deliverables

This research should achieve the aims set out in **2. Aims and Objectives**.

We expect this work to result in two segmentations – one for our primary audiences (sector) and one for our secondary audiences (public) – but these should come together as part of a single coherent approach. We understand the nature of segmentation as continually evolving. This initial research will set out a proposal for a segmentation which can be tested and iterated.

The following outputs are required during the delivery phase:

November 2022 – Inception

- Project Initiation Document – due within 2 week of contract inception

January 2023 - Interim deliverables including:

- Draft audience segmentation, to be further tested through iteration

March 2023 - Final deliverables including:

- Final sector audience segmentation and profiles
- List of measures and data sources (aligned to segmentation criteria)
- Perceptions questions
- Tools, templates and guidance as appropriate

- Recommendations for future development and research

The deliverables will be agreed with the successful bidder on appointment.

The primary audience for this research is an internal one, specifically the audience segmentation will be used by the Marketing and Communications team, Strategy and Policy team, and Engagement teams. Access to reliable audience insight will enable more effective strategic communications which means that, as an organisation, we are better placed to achieve our objectives.

It should be assumed that all documentation produced will be made available to all Heritage Fund staff. The consultant will be required to provide regular updates on work in progress and communicate the final deliverables through appropriate means, for example through presentations and slidedecks.

Whilst this research is for internal use within the Heritage Fund, we do anticipate sharing the findings and deliverables in future with partners and external stakeholders including, but not limited to, DCMS and the other ALBs. Further public sharing with the sector, for example on our website or via knowledge briefings, will be a separate consideration following the completion of this research.

5 Contract Management

We expect the research to begin in November 2022 and be completed by 31st March 2023.

The budget is £40,000 ex. VAT (£48,000 inc. VAT) and the payment schedule will be 50% at the start and 50% on completion.

The contract will be let by the National Heritage Memorial Fund. The contract will be based on the Heritage Fund's standard terms and conditions.

The research commission will be managed by an Insight Manager from the Research, Data and Insight team. It will be overseen by a steering group (expected 8 individuals) representing the Marketing and Communications team and other relevant areas of the organisation. The steering group will provide advice and support to enable the successful delivery of the contract.

We expect the successful bidder to take a collaborative approach; working closely with the Heritage Fund staff to understand requirements and to test the emerging segmentation approach. Collaborative work will be facilitated and supported by the Insight Manager.

SECTION 2 – GENERAL REQUIREMENTS OF THE SPECIFICATION

Accessibility:

All reports must adhere to the Heritage Fund's accessibility and formatting guidance included in Appendix II.

The Heritage Funds expect contractors to be able to meet the accessibility requirements set out in the accessibility and formatting guidance. Contractors should please note that if the required skills are not held in house they will be expected to source and resource these to ensure reports and deliverables will meet the accessibility requirements.

The contents, structure, and appendices of all reports and deliverables to be agreed between the Heritage Fund and the contractor in advance of writing. All reports and deliverables to be supplied in electronic format unless otherwise agreed.

Research Ethics:

We expect all projects we fund to adhere to the Social Research Association (SRA) ethical guidelines. If your proposal raises particular ethical issues, you must indicate what they are and what your strategy for addressing them is.

We do not anticipate that the research will require a Research Ethics Assessment however assessments can be completed as appropriate following the appointment of the successful bidder, as appropriate to the proposed methodology.

Data Protection:

The successful bidder must comply with all of the requirements of UK and European Data Protection Laws and shall ensure appropriate research consents from interviews or any data collection.

This research will require a Data Protection Impact Assessment and a full assessment can be completed on the appointment of the successful bidder, with specificity to the proposed methodology.

Appendix I: About the Heritage Fund

We are a non-departmental public body (or Arm's Length Body) accountable to Parliament via the Department for Digital, Culture, Media and Sport (DCMS). Our decisions about individual applications and policies are entirely independent of the government.

We are governed by a Board of Trustees, chaired by Simon Thurley CBE. Day-to-day activities are delegated to our executive team, chaired by Chief Executive Eilish McGuinness.

We operate under the name The National Lottery Heritage Fund. However, 'Trustees of The National Heritage Memorial Fund' is our legal body for the administration and supervision of all funds.

Funds are distributed under three different names:

- National Heritage Memorial Fund distributes government 'grant in aid' funding to UK heritage at risk of loss. This is a fund of last resort.
- The National Lottery Heritage Fund distributes the heritage share of The National Lottery's funds for Good Causes.
- Heritage Fund distributes non-Lottery funding, including 'grant in aid' and loans, to heritage organisations.

There are three central Directorates

Business Services

Supports the delivery of our work by partnering with and providing expertise to other departments in our offices across the UK. The directorate comprises legal and governance, HR and people, IT, estates, finance and procurement departments. Harnish Hadani is the interim Executive Director of Business Services.

Business Delivery

Supports our vision and mission by developing strategic partnerships, and engaging with and investing in heritage organisations across the UK at local level. The directorate oversees the distribution – on average – of at least £300m into the sector each year. Anne Jenkins is the interim Executive Director of Business Delivery.

Business Innovation & Insight

Supports and champions the UK's heritage, and through work with colleagues and stakeholders, develops strategy, research and policy, and engaging marketing and communication campaigns, to showcase the transformative impact of National

Lottery funding. Isabel Hunt is the Executive Director of Business Innovation & Insight.

There are also national and regional offices

Our work covers all UK nations. There are three offices in England and one each in all other nations. Six directors lead our nations and areas across the UK.

Committees make funding decisions

There are six committees. Three regional committees in England (London & South, Midlands & East, North) and three national committees in Scotland, Wales and Northern Ireland. They are made up of local people passionate and knowledgeable about the heritage in their area and recruited through open advertisement.

Our committees make decisions on grant requests between £250,000 and £5million. They also recommend the funding priorities and provide a crucial local perspective to the Board. Our committees meet every three months to take decisions on grants in their local areas

Requests for grants of up to £250,000 are discussed at monthly advisory meetings and a decision made by the local Head of Investment.

National Lottery Grants for Heritage under £5million

Decisions are made locally, dependent on the grant amount.

- **National Lottery Grants for Heritage up to £250,000:** These decisions are made on a monthly basis at Area/Nation delegated decision meetings. These meetings are managed and chaired by Heads of Investment
- **National Lottery Grants for Heritage between £250,000 and £5million:** These decisions are made by committees in Northern Ireland, Scotland, Wales and across England. The committees meet every three months

All other awards

These decisions are made by our Board of Trustees or by panels delegated by the Board.

These include:

- National Lottery Grants for Heritage over £5million award decisions made at Board meetings.
- National Heritage Memorial Fund award decisions made at Board meetings.
- Special awards and initiatives decisions made by panels delegated by the Board.

What we fund

We intentionally do not provide a definition of heritage. Heritage can be anything from the past that you value and want to pass on to future generations. From local parks and landscapes, to castles or community projects. We use six heritage sectors to categorise what we fund.

- Areas, buildings and monuments: Looking after historic buildings, monuments and archaeology ensures that we can safeguard the places people love for future generations.
- Community Heritage: Celebrating our community heritage can help bring people together, feel pride in where they live and save stories and traditions.
- Cultures and memories: We fund projects which help to explore, save and celebrate the traditions, customs, skills and knowledge of different communities.
- Industrial, maritime and transport: Our funding celebrates the innovative buildings, transport and technology that helped to shape the modern world.
- Landscapes, parks and nature: The need to aid nature's recovery is urgent. That is why funding landscapes and nature is one of our key strategic funding priorities until 2024.
- Museums, libraries and archives: Museums, libraries and archives tell the stories of our cultural heritage. Through their collections they help to give us a sense of place and identity.

Appendix II: Accessibility and formatting guidance

The National Lottery Heritage Fund is committed to providing a website that is accessible to the widest possible audience. Our site is annually tested by accessibility auditors and we must meet a AA compliance level. Our accessibility testing encompasses not just site functionality and design but all of our content, including downloadable documents.

Reports and other documents created for the Heritage Fund (**including the tender submissions**) need to be clear, straightforward to use and ready to circulate internally, externally and online, as well as suitable for use by screen reading software. Best practice in accessibility is summarised below:

Readability

In **reports**, and all other documents that may be published online including the **tender submission** consultants should ensure that:

- The size of the font is at least 12pt;
- There is a strong contrast between the background colour and the colour of the text. Black text on a white background provides the best contrast. This also applies to any shading used in tables and/or diagrams;
- Italics are only used when quoting book titles for citations and items on the reference list should be arranged alphabetically by author
- Colour formatting and use of photos should be of a resolution size that is easily printable and does not compromise the printability of the document.

For further guidance on ensuring readability of printed materials, please refer to the RNIB Clear Print guidelines. These can be found on the RNIB website.

Accessibility

Reports should adhere to the following guidelines:

Formatting

Headings and content in your document should be clearly identified and consistently formatted to allow easy navigation for users. Heading Styles should be used to convey both the structure of the document and the relationship between sections and sub-sections of the content. Heading styles should follow on from each other i.e. Heading 1 then Heading 2.

Spacing

Screen readers audibly represent spaces, tabs and paragraph breaks within copy, so it is best practice to avoid the repetitive use of manually inserted spaces. Instead, indenting and formatting should be used to create whitespace (e.g., use a page break to start a new page, as opposed to multiple paragraph breaks).

Alternative text

Alt text is additional information for images and tables. This extra information is essential for both document accessibility (screen reading software reads the Alt text aloud) and for the web. Alt text should be concise and descriptive, and should not begin with 'Image of' or 'Picture of'.

Images

These should be formatted in-line with text, to support screen readers. Crediting pictures may be necessary, usually in response to a direct request from a third party.

Tables

These should be for used for presenting data and not for layout or design. They should be simple and include a descriptive title. The header row should be identified and there shouldn't be more than one title row in a table. There should be no merged or blank cells.

Additional documents

Any additional information, separate to the report, for example proformas and transcripts which may be used as standalone documents must be fully referenced to the piece of work being submitting and therefore dated, formatted and numbered appropriately.

Acknowledgement

All reports should acknowledge the Heritage Fund. Our logo can be found on The Fund's website.

Further resources

Please refer to the WCAG 2.0 article on PDF techniques for further information.

Submitting your report to The Fund

Please check the accessibility of your document using the Word accessibility checker before submitting: File – Info – Check for Issues – Check Accessibility. Please submit your document as a Word file. The Fund retains the right to amend documents in order to create accessible versions for publishing.