**Order Schedule 20 (Brief)**

**Bid Pack**

**Attachment 3 – Statement of Requirements**

Contract Reference: CCCO23A02 – Provision of Partnership Marketing Services

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# PURPOSE

## The Department for Transport (DfT) (The Buyer) is looking to award a standby agreement with a high performing Supplier to deliver high profile partnership marketing activity across a number of wide-ranging campaign areas and audiences. The successful agency will have proven ability in activating strong relationships and outputs with partners across a range of sectors, delivering innovative and creative solutions on time whilst providing excellent value for money.

# BACKGROUND TO THE CONTRACTING BUyer

## The [Department for Transport](https://www.gov.uk/government/organisations/department-for-transport) want to deliver a transport system that works for everyone. By always putting passengers and motorists first, DfT will make people’s journeys safer, cleaner, faster, and more affordable today, while building the capacity needed for tomorrow.

## The DfT Communications Group has an excellent reputation for delivering high quality, impactful and effective communications campaigns. The Department is consistently at the top of the news agenda supporting a transport network and planning and investing in a transport infrastructure to keep the UK on the move.

# Background to requirement/OVERVIEW of requirement

## The benefits of partnership marketing are widely recognised across HM Government communications. Improving the reach and impact of DfT messages through earned channels, trusted voices and creative content. The DfT is looking to build on some well-established partnership marketing programmes with the potential to explore and develop partnership opportunities in new areas.

## The standby agreement is for an initial period of three years, having the option to extend for an additional year.

## **REDACTED TEXT under FOIA Section 43 Commercial Interests**.

## Existing and currently planned campaign areas (subject to PASS approval) include:

### THINK! Road Safety

###  ‘it’s everyone’s journey’

# definitions

|  |  |
| --- | --- |
| Expression or Acronym | Definition |
| ALBs | DfT’s Arm’s Length Bodies at any time during the term of contract. |
| BAME | Black, Asian and Minority Ethnic |
| Brief | Partnership Marketing requirements for each campaign |
| KPIs | Key Performance Indicators |
| Partners | Those recruited and managed to deliver in kind campaign support through content or channels |
| ROI | Return on Investment |
| The Agency | Means the Supplier |
| The Client | Means the Department for Transport |
| The Department | Means the Department for Transportincluding its Executive Agencies and otherArm’s Length Bodies |

# scope of requirement

## The Supplier shall be a highly skilled marketing agency with an outstanding record in successful partnership marketing and expertise in a broad range of sectors. The Supplier will:

### Strategy

* use data to develop evidence-based strategies and manage one-off and multi partner programmes, over both short-term and multi-year periods
* be aware of their obligations under the Public Sector Equality Duty, and factor in equality, inclusion, diversity and accessibility into the partnership approaches and output

### Partner Management

### work with organisations at a national and local level to deliver partnership activity

### design, prioritise and manage partner acquisition and retention programmes

### Creative Solutions

### use data to underpin creative development

### implement and leverage existing and new partner activity, developing partner toolkits and delivering events and innovative digital solutions

### have access to strong creative production capabilities, that can be used both to create alone and to co-create innovative content to reach target audiences both on and offline, ensuring it is sufficiently tested to prove effectiveness

### work with media owners and partners to generate content and programming

5.1.4 Evaluation

* monitor, track and evaluate partnership programmes through both robust quantitative and qualitative measures evidencing the unseen value that partnerships can bring to a campaign, e.g. return on investment

5.1.5 Access to wider skills and resource

* have access to expertise in sponsorship strategy development, implementation and communication if required
* have access to expertise to develop and execute digital and public relations activity including content and delivery if required
* have access to expertise to develop and execute educational specialist communications activity including public relations and school’s resources

5.1.6 Account Management

* have flexible capability and capacity, keeping up to date with fast moving events and working closely with the client day-to-day and at senior level
* work closely and collaboratively with other agencies appointed by the client

## DfT Executive Agencies and other arms-length bodies will be able to access the agreement directly at the Buyer’s discretion.

# The requirement

## The Agency shall work effectively across a number of different agency partnerships this will include:

## Alerting wider agency group upstream at the planning stage to maximise value of partnership opportunities and ensure all are aligned on deadlines and deliverables

## Ensuring that all content generated fits with wider creative strategy and is delivered directly to media owners in a timely and efficient manner

## Ensuring evaluation metrics and campaign learnings feed into wider reporting, monitoring and optimisation

## As well as creating outputs with partners that have a fit with the target audience and align with brand values, the Buyer can also see the value of developing tri-partnerships and initiating opportunities for partners to network and generate ideas together. For example, pairing a media partner and a brand partner together so that is able to maximise both content and reach, or aligning a charity so that they can co-create, endorse and promote through their channels.

## The Supplier shall offer new and innovative solutions that will stand out and have impact. All communications should be developed with accessibility in mind and meet the required accessibility standards. <https://www.w3.org/WAI/fundamentals/accessibility-intro/> for all online content and comply with web content accessibility guidelines (WCAG) 2.1 <https://www.w3.org/WAI/standards-guidelines/wcag/>

## Some campaign content is expected to be sensitive and will require a robust approach with intelligent negotiation and an eye for potential issues and conflict.

## The Buyer understands that developing new partnerships and opportunities can often have long lead times; the Supplier shall provide a clear pathway with realistic targets in terms of deliverables and outputs.

## Whilst DfT sees the benefits of pooling all Group Communications partnership marketing requirements into one Supplier, DfT is also aware of the potential risks with this approach. A number of the core campaigns may require activation and support on award of the contract, allocated resource will therefore need to be sufficient to accommodate this so as not to undermine the quality of outputs.

## An outline of DFT requirements for each of the existing or currently planned campaign areas, subject to Cabinet Office Professional Assurance approvals:

## **DFT Campaigns**

### **THINK! Road Safety**

ISSUE: Too many people, particularly young men, are killed and seriously injured on the UK roads.

AIM: Reduce the number of people killed and seriously injured on the roads in England and Wales.

OBJECTIVE: Change attitudes and behaviours towards the most risky driving behaviours by addressing the cultural, contextual and habitual factors that contribute to accidents in the moment (social practice theory).

ROLE FOR PARTNERSHIP MARKETING: Recruited partners should provide incentives or solutions to encourage the Buyer’s audience not to drive recklessly or complacently, and should extend the reach of the campaign messages.

NEW PARTNERS: Drink Drive has been the historical focus for partnership, but the Buyer would like to explore commercial partnerships that will tackle wider issues around driving safety. The new Supplier is required to advise on new partners that could include:

* Tech Brands – technology solutions to good driving.
* Insurers –offer incentives for safer driving?
* Car Brands – that understand driving skills
* Gaming Brands – to highlight how real life driving skills and gaming skills differ
* Youth Brands – those that can influence the young drivers 17-24

CURRENT PARTNERS: The new Supplier is required to maintain and cultivate relationships with established partners (ABinBev, Budweiser, Diageo, Drinkaware, insurance companies, driving schools).

SUCCESS: Identify a number of quality partners to co-create content that will support the overall campaign strategy (this could include three-way partnership opportunities) and identify a larger range of partners to help amplify the content. The partners should have direct access to a young male audience and be trusted and credible among this group.

### **‘it’s everyone’s journey’**

ISSUE: Disabled people do not feel confident to use public transport and transport operators and the wider public could be doing more to support access.

AIM: Create a supportive travelling experience amongst the general public by promoting ways of positively interacting with disabled people and reducing instances of disability related hate crime. Positively engage disabled people to improve confidence and use of public transport services, creating a transport system offering equal access for disabled people by 2030, improving access to employment, education, healthcare and social activities.

OBJECTIVE:

* To increase the use of public transport by disabled people by improving confidence to travel
* To increase awareness of the needs of disabled people, particularly those with hidden disabilities, amongst the general travelling public
* To amplify actions of operators and partners that help to improve the travelling experience for disabled people

ROLE FOR PARTNERSHIP MARKETING: Activate and coordinate a focused drive to enable disabled people to confidently travel on a range of public transport. Analyse the existing landscape and insight to identify opportunities to support disabled people, working with delivery, media, private sector and charity partners to engage and motivate hard to reach groups. Generate engagement and awareness amongst the wider travelling public and use trusted voices to extend the reach of the campaign.

NEW PARTNERS: The campaign has traditionally partnered with organisations in the transport operator and disability sectors. The new agency is required to advise on new partners that could include:

* Quick service retail (particularly within transport hubs)

CURRENT PARTNERS: The new Supplier is required to maintain and cultivate relationships with selected established partners (e.g. WH Smiths, Lime Bikes, GTR).

SUCCESS: A recognised centrally led drive to enable disabled people to travel with confidence across a range of transport services. An increase in awareness and support from the wider public and transport operators to alleviate the barriers to accessible transport. A range of partners both at the point of travel and beyond which might include tech, charity, in situ brands and schools.

##  The Buyer shall also:

### Agree and present a strategy and produce a detailed communications plan to deliver each programme of work. This should complement wider campaign strategies where appropriate.

### Produce a weekly status report and meet regularly (frequency of status meetings to be agreed by campaign on appointment) to share progress.

###  Provide and agree an approval process with the Buyer for each campaign. The Buyer will have final sign off on all creative material and payment for creative will not be made until this has been achieved.

### Provide accurate notes and actions from all meetings between the Buyer and the Supplier and between the Supplier and Partners unless agreed in advance with the Buyer

### Provide high quality, accessible and innovative creative content that inspires the target audiences and brings the campaigns to life.

### Provide creative solutions to promote partner content so that audiences are reached and engaged.

### Understand and keep up to date with developments and new opportunities within the specialist areas of each campaign.

### Provide an evaluation report detailing performance against KPIs (including ROI) and learnings for future campaign activity.

### Adhere to data protection rules and requirements in the management of personal data.

# key milestones and Deliverables

## The following Contract milestones/deliverables shall apply:

|  |  |  |
| --- | --- | --- |
| Milestone/Deliverable | Description | Timeframe or Delivery Date |
| 1 | Kick off meeting with Buyer | Within week 1 of Contract Award  |
| 2 | Response to brief including creative approach, a top-level comms plan and agreement on upcoming deliverables (events, partner materials)  | Within a min 2 weeks of receipt of detailed brief A one-week response to brief may be required in exceptional circumstances |
| 3 | Invoicing schedule agreed | Within 2 weeks of detailed brief  |
| 4 | Final strategy and detailed communications plan  | Within 4 weeks of detailed brief  |
| 5 | Evaluation report | Within 4 weeks of specific campaign activity, at 6 and 12 months or as agreed at briefing stage for long term projects |
| 6 | The Supplier shall provide and agree an approval process with the Buyer for each campaign. As outlined in Section 3.9.5 | Within 4 weeks of detailed brief |
| 7 | Contract review | Every 3 months post contract award |

# MANAGEMENT INFORMATION/reporting

## The Supplier shall provide weekly status reports attending status meetings as required. The frequency and format of status meetings will be agreed with individual campaign teams on appointment.

## The progress of all projects will be monitored throughout with evaluation reports due within four weeks of campaign activity with the option of a six and twelve month report each year. The response to brief should include KPI recommendations which, once agreed, will be added to those at 13.2.

## The Supplier shall attend and contribute to quarterly contract review meetings and identify and implement improvements.

# volumes

## Given the stand-by nature of the contract volumes will be agreed as individual briefs are issued. Subject to Cabinet Office Professional Assurance approvals the existing or currently planned campaign activity is anticipated to require the following:

### THINK!: The partners should have direct access to a young male audience and be trusted and credible among this group. DfT would also like to identify a larger range of partners to help amplify the content, while maintaining existing relationships with historic partners, and building relationships with longer term strategic partners with the opportunity to reach overheard audiences and work from data to localise our partnerships approach.

### ‘it’s everyone’s journey: The partners should have direct access to a commuting audience and be trusted and credible among this group. DfT would also like to identify a larger range of partners to help amplify the content, while maintaining existing relationships with historic partners.

# continuous improvement

## The Supplier shall continually improve the way in which the required Services are to be delivered throughout the Contract duration.

## The Supplier should present new ways of working to the Client during quarterly contract review meetings.

## Changes to the way in which the Services are to be delivered must be brought to the Buyert’s attention and agreed prior to any changes being implemented.

# PRICE

## The Contract will be for three years with a possible one-year extension period (3+1). The maximum contract value is £3 million exc. VAT. An additional £1 million exc. VAT is available should the contract be extended for a further year.

## There is no commitment by the Buyer to spend this value. Commitments will be made through agreement to individual campaign proposals and issue of purchase orders.

## Prices are to be submitted via the e-Sourcing Suite Attachment 4 – Price Schedule excluding VAT and including all other expenses relating to Contract delivery. Prices submitted in any other format will not be considered at tender stage. Prices will be held firm for the duration of the contract.

# STAFF AND CUSTOMER SERVICE

## The Supplier shall provide a sufficient level of resource throughout the duration of the Contract in order to consistently deliver a quality service.

## The Supplier’s staff assigned to the Contract shall have the relevant qualifications and experience to deliver the Contract to the required standard.

## The Supplier shall ensure that staff understand the Buyer’s vision and objectives and will provide excellent customer service to the Buyer throughout the duration of the Contract.

# service levels and performance

## The Buyer will agree KPIs with the Supplier at briefing stage for each campaign.

## The Buyer will also measure the quality of the Supplier’s delivery by:

|  |  |  |  |
| --- | --- | --- | --- |
| KPI/ SLA | Service Area | KPI/SLA description | Target |
| 1 | Account Management | Status reports to be submitted -, attendance face to face as agreed | Weekly |
| 2 | Service Delivery | Production: Responsiveness and delivery against overall brief | 2 weeks for response to brief, 1-week response in exceptional circumstances |
| 3 | Performance | Testing: campaign optimised based on ongoing feedback and testing | Targets and frequency to be agreed at briefing stage |
| 4 | Outputs | Social reach and website metrics:Quality of partners and effectiveness of partner prioritisation – partner reach, relevance and outputsMinimum ROI of 3:1 | Targets and frequency to be agreed at briefing stagePartner ROI of 3:1 |
| 5 | Performance | Performance against previous content and campaigns e.g. engagement rates and partner take up. | Targets and frequency to be agreed at briefing stage |
| 6 | Performance | Set attitudinal measures  | pre and post campaign activity |

## Quarterly contract review meetings will be undertaken to recognise success and provide opportunity to improve in any areas of underperformance.

## On termination of the contract all information and assets created as part of the contract will be supplied to the Buyer at no additional cost.

# Security and CONFIDENTIALITY requirements

## As outlined in the Terms and Conditions

## The Supplier shall keep all campaign briefings, materials and partner agreements confidential until such time that the Client has agreed their release.

# payment AND INVOICING

## Detailed itemised costs must be provided and signed off by the Buyer before any work commences. After which a Purchase Order will be provided by the Buyer.

## The Supplier shall produce and agree an invoicing schedule within 3 weeks of each detailed campaign brief.

## Payment can only be made following satisfactory delivery of pre-agreed products and deliverables that have been approved by the Buyer.

## Before payment can be considered, a detailed elemental breakdown of work completed, unit price and cost must be provided to the client in an agreed format. This will be required ahead of the Supplier issuing an invoice as directed below, and could potentially be the draft invoice.

## For DfT orders, Supplier invoices should be sent to either (not both):

## Email to **REDACTED TEXT under FOIA Section 40, Personal Information**.in pdf format. It is the Agency’s responsibility to ensure the email is received by the Account Payable team.

## Post to **REDACTED TEXT under FOIA Section 40, Personal Information**.

# CONTRACT MANAGEMENT

##  This Contract will be managed by the Buyers. Contract Review meetings will be held on a quarterly basis, at the Buyer’s offices and shall be at the Supplier’s own expense.

# Location

## The location of the Services will be carried out at the Supplier’s offices however the Supplier will be expected to regularly attend meetings at the Buyer’s offices

## DfT: **REDACTED TEXT under FOIA Section 40, Personal Information**.