

# Quote request

# External communications and PR support

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# Proposal request

## Overview

Fair4All Finance is seeking an agency to provide external communications and PR support to secure better coverage and publicity of our work on Financial Exclusion.

Our mission is to improve the provision of financial products and services to people in financially vulnerable circumstances. We work with government, mainstream finance and the affordable credit sector to increase the availability of appropriate and affordable financial products and services.

Alongside this we work with consumer groups and other stakeholders like housing associations and price comparison websites to ensure that these products are accessible, and that financially vulnerable consumers have increased awareness of their choices and the value that each product offers them.

We would like to work with a partner who has the relevant expertise and knowledge to refine and develop our message and help communicate it clearly to our multiple and diverse stakeholder groups both directly and via industry and national media channels.

## About Fair4All Finance

Fair4All Finance is a not-for-profit organisation founded in early 2019 to increase the financial wellbeing of people in vulnerable circumstances by increasing access to fair, affordable and appropriate financial products and services. We have three main priority areas:

- Expanding provision of affordable credit initially through a scaled community finance sector
- Partnering with banks and financial service providers to support the delivery of products and services for customers in vulnerable circumstances
- Developing and scaling products and services to address market gaps

You can find our full strategy [here](#).

## Introduction

Clear communications are critical in helping us meet our strategic priorities and achieving systems change. We have three core beliefs that inform our approach and communications:

- 1 Financial products and services can and should serve people in vulnerable circumstances
- 2 Fair financial products and services improve people's wellbeing and result in sustainable outcomes
- 3 Financial inclusion is the responsibility of the whole financial sector

And our stakeholder led strategy is broadly grouped into three categories:

- 1 Working with our close community of mission aligned organisations to better serve people in vulnerable circumstances – includes alternative providers, charities, think tanks, social investors etc
- 2 Engaging the mainstream financial sector and building the case for them to further serve this customer group
- 3 Working with government and regulators to ensure systems change is enshrined and sustained

We have clear messaging and a targeted stakeholder engagement and communications plan. We are seeking support to execute this plan across 2022.

Looking ahead at 2022, our immediate communication priorities are:

- Highlighting the growing need for financially inclusive products and services, and the widening gap in provision
- Promote the role of mainstream banks in further serving customers in vulnerable circumstances – directly and indirectly

We should highlight the impact of the cost of living crisis on people in vulnerable circumstances across all of our communications and we have several research pieces due over the summer to use as evidence points to support our messaging.

## The specification

We would like to work with an agency that can provide external communications/PR support to help us tell our story, raise awareness around financial inclusion and celebrate the great work of our team. Whether we're talking about an exciting new partnership, a new product coming to market, the findings of research we've commissioned or helping our spokespeople contribute to the national conversation, you will have experience in successfully pitching and landing coverage.

The cost of living crisis, levelling up agenda and the role of banks in society are all areas we want to develop our voice on in the coming months, as well as some key engagement projects like the Dormant Assets Scheme expansion consultation.

There is a significant gap in the current public understanding of financial inclusion and the different leavers to get to long term change on the topic. We have an ambitious strategic communications plan to bridge this gap for key audience groups, including with senior leaders in the financial services sector.

We are looking to work with a partner who can be flexible and provide support where needed on projects. The work will vary from editing and issuing a press release to helping us develop and refine our messages. We are seeking someone who can understand our messages, our audiences and communications objectives and can thread these messages throughout their work.

Our strategy has three key elements with a focus on engaging and communicating with:

- Those already serving this customer group – providing support to help them grow and reach more customers
- Mainstream banks and financial service providers – to identify partnership opportunities for innovating and scaling best practice in serving this customer group
- Government and regulators – to develop policy and regulation that enables providers to serve customers in vulnerable circumstances well, in a way that helps alleviate poverty

PR support would fall into the following categories:

### **Journalist relationships**

- Working closely to keep journalists engaged and open to pitches from Fair4All Finance. We want to feature across a variety of different media outlets, including trade press, however we have a particular interest in securing coverage in publications such as the Telegraph, Financial Times, Daily Mail, Spectator
- It's important that we're able to quickly react to sector developments and the rolling news cycle. You will be able to brief our team on upcoming opportunities us to respond and contribute to the wider conversation
- Help Fair4All Finance build relationships with relevant journalists, booking agents and editors

### **Story pitching**

- You will be able to work with our Communications team to create and edit engaging pitches and feel comfortable suggesting possible angles, story ideas and opportunities to land content that engages with our core mission and communication objectives

### **Press Releases**

- Input into and provide feedback on press releases on behalf of Fair4All Finance and partnership working arrangements
- Issue press releases on behalf of Fair4All Finance

## Outputs/deliverables

It is critical that Fair4All Finance is able to measure the impact of our work, both on the finance sector and to the end customer. When this work is successful, we will see the following impacts:

- 1 We would expect to see an increase in the amount of quality press coverage and media opportunities that Fair4All Finance and our partners receive.
- 2 We will see an increase in traffic to the Fair4All Finance website, with an increase in the amount of sign-ups to our newsletter.
- 3 Fair4All Finance will have built relationships with journalists and editors and be a 'go-to' for comment and opinion on developments for topics on financial inclusion.

In addition, the provider will work with the Fair4All Finance team to plan forward communication approaches and key messages

## Timings

### Timetable for proposal responses

Stage	Dates
Quote request published	27 April 2022
Questions by	4 May 2022, by 5pm
Proposals due	11 May 2022, by 5pm
Assessment	w/c 16 May 2022
Interviews	19-20 May 2022
Decisions made	w/c 23 May 2022

## Your response

To respond to this quote request, please provide a proposal for how you would deliver the required specification for the scope of services as outlined above. The proposal assessment criteria and requirements are set out below.

Clarification questions on this quote request may be addressed to [Max@Fair4AllFinance.org.uk](mailto:Max@Fair4AllFinance.org.uk) by 4 May 2022, 5pm.

Any question responses which are relevant to all will be shared with all applying parties. If you intend to submit a proposal please advise us at your earliest convenience so that question responses can be shared. Questions will be anonymised before responses are shared with respondents.

## Proposal submission and scoring criteria

Please email a proposal of no more than ten pages to Max Holloway at [Max@Fair4AllFinance.org.uk](mailto:Max@Fair4AllFinance.org.uk) by 11 May at 5pm. **Note – proposals of excessive length may be returned.**

Proposals submitted will be assessed by Fair4All Finance against the following questions:

<p><b>Understanding of requirements</b></p> <p>Please explain what you understand Fair4All Finance is aiming to achieve in commissioning this work.</p> <p><b>To what extent does the proposal demonstrate an understanding of the issues related to this brief?</b></p>	<p><b>10%</b></p>
<p><b>Please set out your proposed methodology by stage</b></p> <p>To what extent are the methodology and methods appropriate to the requirements set out in this brief?</p>	<p><b>20%</b></p>
<p><b>Relevant experience</b></p> <p>Please set out your experience relevant to this request. Please include specific examples related to our brief as relevant to your response.</p> <p>Please provide the name of two references we can contact in confidence, and at our sole discretion to confirm the work you undertook and its relevance.</p> <p><b>What degree of experience does the bidder demonstrate in order to successfully complete the work?</b></p>	<p><b>35%</b></p>
<p><b>Appropriate resourcing</b></p> <p>Please set out your resourcing plan and assumptions about the time commitments you plan to make by grade and resource type.</p> <p>Please make it explicitly clear who will be accountable for the work and who our day to day contact will be.</p> <p>How well has the bidder structured a team in order to successfully manage the contract and deliver the required work to the budget and timetable required?</p>	<p><b>15%</b></p>
<p><b>Value for money</b></p> <p>To what extent does the proposal represent good value for money?</p>	<p><b>20%</b></p>

## Budget and Pricing

Given the not for profit nature of Fair4All Finance, and our founding and funding through government, please indicate where you have given a discount on commercial rates.

We would welcome proposals which identify a way to deliver the requirements for under the identified budget on a fixed price basis.

- Please outline any VAT and or expenses which may be payable clearly and separately.
- The total budget for the specification is **£25,000 inclusive of VAT**, which we expect to draw over the next 9-12 months. Depending on the outcomes from the initial work together, we may extend the scope of the contract in duration and value of up to £50,000 in addition to the £25,000 of original scope
- We envisage using the budget on a draw down basis and we're open to receive options of how this arrangement would work, whether there's a fixed cost or itemised cost for specific tasks (ie issuing press release)

## Notes

- We expect to contract using the Fair4All Finance contract template issued with this quote. Submission of a quote will be deemed as acceptance of our contract template
- As above, we reserve the right to appoint more than one provider and use their skills on specific instances as appropriate
- We reserve the right to extend these contracts by mutual consent within the constraints of the public procurement regulations
- Quote request responses not received by the deadline will not be considered
- Quotations shall be valid for 90 days
- All bidders are solely responsible for all their costs and expenses incurred in connection with this procurement process at all stages
- Fair4All Finance reserves the right to amend or cancel the procurement exercise at any point. Fair4All Finance will accept no liability for any losses caused by any change or cancellation of this procurement exercise nor any decision not to award a Contract
- Any information submitted to Fair4All Finance may need to be disclosed and/or published by Fair4All Finance. Fair4All Finance may disclose information in compliance with the Freedom of Information Act 2000, any other law, or, as a consequence of judicial order, or order by any court or tribunal with Fair4All Finance to order disclosure
- Data Protection Act 2018 - Any awarded Contract will be subject to the Data Protection Act (DPA)

2018. Fair4All Finance reserve the right to request additional evidence to undertake sufficient due diligence of any Tenderer to ensure they have implemented the appropriate technical and organisational measures to comply with the act

- Fair4All Finance is committed to greater transparency and may publish its tender documents, contracts and data from invoices received and may at its discretion redact all or part of such information prior to publication
- Bidders shall not (and shall procure that their subcontractors and representatives do not) do any of the following without obtaining the prior written consent of Fair4All Finance:
  - make a public statement or communicate in any form with the media in connection with this procurement
  - use any trademarks, logos or other intellectual property rights associated with Fair4All Finance and/or its stakeholders
  - represent that the Bidder is directly or indirectly associated in any way with Fair4All Finance and/or its stakeholders or that its or their respective products and/or services are in any way endorsed by Fair4All Finance and/or its stakeholders
  - do anything or refrain from doing anything which would have an adverse effect on or embarrass Fair4All Finance and/or its stakeholders
- Tenders with abnormally low prices may be rejected by Fair4All Finance. Prices that are suspiciously low in the opinion of Fair4All Finance will be considered further before a decision is taken as to whether the price is abnormally low. This will include clarification with the relevant bidder
- Fair4All Finance will award the Contract to the bidder, or bidders, submitting the offer that best meets scoring criteria from the point of view of Fair4All Finance
- Fair4All Finance will notify all bidders of its contract award decision