**Energy Saving Trust’s response to the Department for Energy and Climate Change’s**

**Invitation to Tender for consumer energy delivery partner for the Big Energy Saving Week Campaign**

Tender Reference Number: 1047/07/2015

Deadline for Tender Responses: 5pm Friday 24th July

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Proposal Manager: Julian Roberts

 Head of Communications

Energy Saving Trust Ltd

Authorised by: Jane Goddard

Group Head of Marketing and Communications

 Energy Saving Trust Ltd

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# Our Understanding of the Brief

The Department of Energy & Climate Change (DECC) recognises that whilst vulnerable consumers are aware of the savings to be made from switching, many face additional barriers to engagement which prevent them from actively switching and can lead to lack of engagement with energy markets.

DECC’s research has shown that by working with and through organisations that consumers trust and know many of these barriers can be overcome; building trust in the process and confidence that consumers are receiving impartial, independent advice. DECC is therefore looking for an organisation that is both trusted by and has high levels of engagement with consumers – particularly those that can be harder-to-reach such as the less educated and less well-off. The organisation must be able to communicate appropriate messages via the media, social media, digital channels as well as other channels such as community groups, local authorities, housing associations and charities.

DECC has previously worked with leading third sector and consumer organisations to deliver an annual energy cost saving awareness raising campaign, Big Energy Saving Week (BESW). The fourth and most recent campaign was DECC funded in October 2014. Energy Saving Trust (EST) successfully led on communications for BESW 2014 on behalf of DECC and its partners. DECC are funding a further BESW campaign which is due to be launched on Monday 26th October 2015. DECC are seeking a consumer focussed delivery partner to work alongside both DECC and Citizens Advice to provide a complementary media and promotional campaign to support and publicise key messages to help vulnerable consumers reduce their energy costs, prepare for winter, and promote the face to face advice sessions being run by Citizens Advice throughout the week.

This campaign will also need to complement and integrate with any wider Departmental consumer facing campaigns this autumn.

In our response we set out how we can meet the key requirements for a campaign delivery partner. We demonstrate that we have consumer and media trust in our messages, our expertise in consumer energy issues and how we can use these assets to run an impactful consumer energy partnership campaign, able to reach vulnerable consumers at scale. We also set out how we will utilise our existing networks and expertise to deliver the campaign on time.

We have also provided for your consideration additional work that EST could deliver to maintain consumer awareness of the key messages in support of DECC campaigns throughout the winter.

Should EST be successful in its Tender submission, the overall aim of the BESW campaign will be to run an effective Great Britain wide energy cost saving, awareness raising campaign which will reach millions of consumers ahead of winter.

# Our proposed approach

Our approach will be to create an integrated GB-wide campaign with a compelling, clear and memorable theme that will serve as a vehicle to deliver the key campaign messages to vulnerable people and wider public.

Working closely with DECC, Citizens Advice and other complementary BESW partners, we will bring our impartial and trusted consumer brand – developed over 20 years – to the BESW campaign. Combined with a professionally executed strategic communications campaign, EST’s independent and impartial profile will help maximise media engagement across the Great Britian, and in particular, engagement with those readers, listeners and viewers that are less educated and less well-off.

We plan to build on the successful delivery model adopted for BESW 2014 and put the emphasis on the consumer and how they can take positive actions to save money on fuel bills – we do not want to divert attention with attacks on the energy companies. We will create a compelling, clear and memorable campaign themed around ‘*Check, Switch and save*’.

The campaign objectives will be to:

* encourage consumers to switch to a cheaper tariff or payment method;
* increase awareness of the sources of help and support available to vulnerable consumers, and;
* help consumers take control of their energy usage and spend – including through the take up of energy efficiency measures.

## EST’s experience

**EST’s credibility in the media is underpinned by robust data, experience in running Government programmes and an impartial brand**

Ipsos MORI research shows that EST is the most trusted organisation by consumers for advice on energy in the home and our work in the media is very influential in winning that trust. EST is the first port-of-call for national, regional and local print, broadcast and online media looking for insight, facts, figures and advice for their readers, viewers and listeners on saving energy and money in the home.

Every week our expert commentators give accessible advice in the media on a range of topics from switching suppliers, to turning appliances off from standby and using heating controls more efficiently. They also provide practical advice on installing energy efficiency measures such as insulation and solar panels. In any typical month our advice will have reached about 11 million consumers via the media. When we undertake a major proactive campaign we can expect to reach as much as 80 per cent of the adult population.

We have now delivered a total of 14 successful Energy Saving Weeks in consecutive years, cementing this annual campaign in the media’s diaries and in consumers’ and partners’ minds.

**EST’s proven track-record of delivering campaigns at scale that focus on reaching vulnerable consumer groups**One striking example of our media capabilities and ability to deliver big campaigns is demonstrated by our very successful delivery of BESW 2014. The campaign focused on actionable advice for consumers, encouraging them to take control, and steering conversations away from blaming energy companies, a subject matter than often receives strong media coverage but provides no immediate gains for consumer readers.

As a result of this campaign 80 per cent of the adult population were reached (1,180 pieces of coverage) in every part of Great Britain via the media. 70 per cent of coverage focused on the socio economic groups C1 – E, the key audiences that DECC wanted to reach. 100 per cent of the coverage conveyed one or more of the agreed campaign brand values: informative, trusted and actionable advice that is independent and impartial.

The campaign was also successful in getting key campaign messages across (in 99 per cent of coverage) urging people to check whether they are on the right tariff, urging them to switch when appropriate, and encouraging them to adopt some simple actions to save money on energy bills.

The campaign was more than just a traditional media campaign with 5.86 million people being reached via Twitter and more than 100 organisations – a mix of local authorities, housing associations, charities and corporates – sharing digital collateral created by our team with their consumer audiences.

**EST’s fully trained team of expert media spokespeople**One of the key reasons EST is favoured by the media as a resource for information on saving energy and money on fuel bills is because of our fully media trained, in-house experts who undertake dozens of press interviews each week. Our spokespeople are trained to speak with authenticity, credibility, in a populist consumer delivery style, and are skilled in handling unforeseen tricky questions.

**EST’s established digital consumer engagement platforms**We have established digital and social consumer followings, making our website and social media channels ideal platforms from which to host and share information and practical advice to underpin the BESW campaign.

We are consistently seen in top search results on Google, for example when searching for ‘saving money on energy bills’, enabling consumers to find credible, accurate information quickly and easily.

Our website receives over 5.5 million visitors a year seeking energy and money saving advice, our Facebook has 23,000 followers and we have 37,000 followers on Twitter. This strong following enables us to potentially create millions of impressions (consumer reach) through shares and re-tweets during a campaign.

**EST’s expertise in consumer energy issues and ability to access and use data within the overall budget**

EST’s credibility within the media is underpinned by expert consumer advice and statistics that are always evidence-based and calculated using the most up-to-date and stringent methodologies. Our insight has been developed over two decades of running government programmes, undertaking technology field trials and consumer research. We have built up a bank of unique consumer insight and robust information on the potential monetary and energy savings that can be achieved through behaviour changes and installed energy saving measures. This expertise and experience will add authoritative value to the BESW campaign.

For BESW 2014 our communications team worked closely with our specialist insight colleagues and created press releases that were relevant to consumers wherever they lived in Great Britain.

In addition to a Great Britain press release, Welsh, Scottish, regional English, and over 430 local press releases were created, tailored to their specific region in order to show how much money could potentially be saved in specific areas. This approach was instrumental in achieving the amount of positive and widespread media coverage across Great Britain that BESW 2014 enjoyed.

**EST’s ability to coordinate BESW activities with Energy Saving Advice Service operational opportunities**

EST is well known as an organisation that can directly help people save money on their energy bills. We deliver independent and impartial energy saving advice to more than 500,000 consumers a year in England, Scotland and Wales on behalf of governments. In particular, we run DECC’s Energy Saving Advice [telephone] Service (ESAS) – which many people call for help, especially those unfamiliar with online switching.

ESAS already has a referral process in place to help customer get appropriate help from other relevant organisations such as Citizens Advice which could be utilised to support enquiries that are received as a result of BESW 2015 campaign activities.

ESAS has developed a detailed customer journey for the ECO Affordable Warmth scheme which includes a verification process with the Department of Work and Pensions (DWP) to assess customer eligibility. ESAS is also knowledgeable about Green Deal Communities and customers calling from 109 local authority areas will be informed about local schemes in their area.

We will ensure that the campaign messages and promotion (particularly with the ESAS number) are briefed in to all Advisers within the contact centre. We will also be able to extract ESAS CRM data for impact analysis and reporting.

**EST’s ability to leverage data and insight and deliver an impactful wider-partnership campaign**

In the last decade we have built up strong partnerships across Great Britain and these partners help amplify campaign messages. For BESW 2014 more than 100 organisations ranging from local authorities, housing associations, businesses, NGOs and charities acted as campaign advocates, sharing digital collateral and printable promotional material with millions of vulnerable consumers groups within their extended networks.

Our current communities work programme involves developing the “Community Energy Hub” for DECC. This online platform includes social networking functions that allow groups to identify others who are active in the same geographical area or who are facing similar challenges and developing similar projects. Through this platform we would ensure that BESW campaign messages reached participating community groups. If we were to be successful with this Tender, we would look to build on our wider partner engagement and develop these advocacy partners beyond the week.

Here are just some of the positive comments from the BESW 2014 partners:

*“The information was very useful”, Medway Citizens Advice Bureau*

*“Without EST leading this we would not have had the profile raised in Devon” Mid Devon District Council*

*“Very useful, it’s good to have different pieces of information to choose from…….” South Lanarkshire Council*

*“I’m sure Big Energy Saving Week has you all very busy but it has inspired me to get back to you and take part” Ovo energy*

*“It was useful and made my life easier to get the message across”, East Lothian Council*

*“Just spoke to my team and we would love to be involved with this!” British Gas*

*“Love the media pack.” e-on*

**EST’s experience in communicating BESW as a joined-up campaign**

We recognise and value the benefit of making BESW an integrated and collaborative effort led by three of the UK’s most relevant organisations, DECC, EST and Citizens Advice, to drive this campaign. We are experienced in creating press materials and digital content that are suitable for use by multiple partners, embody an umbrella brand and also communicate shared partner messages.

In 2014 we created BESW press materials and digital collateral which were adopted by both DECC and Citizens Advice and contributed greatly to the overall reach of traditional and social media to vulnerable consumer groups. EST’s success in delivering joined-up campaigns is best exemplified by our independent evaluation of BESW which shows that key partners were referenced in 80 per cent of media activity.

We are also experienced in handling tight timescales and balancing partner timescales, such as providing them with campaign collateral in advance in order to disseminate across networks. Despite the tight timescales we were working to for BESW14 we produced all of the press and digital collateral in time for DECC and Citizens Advice to maximise opportunities. The joined-up nature of BESW14 was a key driver behind the widespread media coverage and social media activity.

# Delivery and Project Management

## Delivery Plan

Our proposed campaign will consist of 10 key activities in order to deliver our proposed approach:

1. **Creating the narrative: GB-wide consumer research**
We will undertake GB-wide consumer research with the respected Ipsos MORI research company to give the latest perspective on consumer attitudes and behaviours towards switching energy suppliers and using energy in the home. This research will create news hooks which will act as vehicles to deliver the campaign’s key messages. The research will also provide interesting insight comparing attitudes and behaviours of people across different age groups, social classes as well as homeowners versus social and private renters. This level of detail will give greater opportunity to find unique news angles in order to target the relevant media and audiences.
2. **Making an impact: two GB media stories targeted at national, regional and local media**
We will create three Great Britain media stories. We will focus heavily on two of them and use the third story as appropriate depending on the media landscape and plans of competitors. We will target media titles who reach the campaign’s target audiences as well as broadening the campaign out so that it becomes a ‘One Nation’ campaign. The two chosen lead stories’ findings will be tailored specifically for Scotland and Wales, English regions and over 430 local authority areas. To bring the local stories to life our insight and data team will make robust calculations on potential energy bill savings for each and every press release making the story as relevant for someone living in Cardiff as it will be for someone in Stockport. The stories will be sold in to the national, regional and local print, broadcast and online media. The first story will hit in the build up to BESW on Wednesday 21 October. The second story will hit on Monday 26 October. And the third story will be kept in reserve and used tactically as appropriate.
3. **Social media push**

We will complement the traditional media activity with a social media plan focussing on Twitter and Facebook.

1. **Show not tell: feature-led case studies**
We will package together weekend feature media stories using case studies of people who have switched energy supplier and adopted advice on being more energy efficient. These stories will be placed in the media for October 24 and 25 and we will explore working with Money Saving Expert or uSwitch on this.
2. **Early materials to support Citizen Advice’s long lead-in**
We will prepare an off-the-shelf press release for Citizens Advice to distribute across their networks in September in order to engage local bureaus with the campaign early on. The BESW lead stories will be provided closer to the actual launch week as these will need good preparation in order for them to be successful.
3. **Lead partner content and messaging documents**
We will prepare comprehensive messages documents, press materials, digital and social content for key campaign leads (DECC, EST and Citizens Advice) to distribute across their marketing and communications channels.
4. **Engaging support partners**
We will create a dedicated page on our website in advance of the week that encourages organisations to support BESW through a range of ways.
5. **Digital content for support partners**
We will issue digital packs to over 100 EST wider partner organisations (communities, businesses, local authorities, housing associations and NGOs) enabling them to engage their consumer audiences with BESW. Collateral will also be available to Energy Champions through the Big Energy Saving Network social network platform, NING.
6. **Collateral for MPs**
Working closely with Citizens Advice’s Public Affairs team we will issue MPs with press releases and localised digital content urging them to get behind the campaign and engage with their constituents. We will also create a photo/social media opportunity using branded material at the parliamentary event Citizens Advice will organise.
7. **Digital engagement campaign**
To support BESW we will run a digital campaign in order to engage and create dialogue with individual consumers to complement the more traditional media strategy.

This will give us insight and feedback on how the campaign is performing with a younger audience not traditionally as engaged with print media. We will produce sharable content such as a BuzzFeed quiz about energy myths, which alongside the campaign content and messages will be shared through Twitter and Facebook.

**How we independently verify and evaluate the BESW media campaign**

EST’s media, digital and social media activities are all independently measured to industry standards by external agency professionals. Our established monitoring and evaluation services would be embedded into the BESW campaign in order to provide DECC with a robust and comprehensive picture of achieved outputs.

Our monitoring and evaluation full reports include:

* GB-wide media cuttings: copies of the print media story and video/audio links for broadcast
* breakdown of where the stories appear, the number of audiences reached, and the demographics of the audiences reached
* measurement of brand, tone and message delivery
* measurement of partner share of voice
* levels of consumer engagement with advice via digital and social media.

We have already initiated exploratory discussion with Ofgem regarding the potential to measure traffic to the ‘be an energy shopper’ site.

We will also measure the level of engagement with our digital content and online quiz which will show how people are responding to campaign messages and the extent to which they are consuming the advice.

**Potential for further evaluation work outside of the Tender contract**

EST has an experienced in-house evaluation team who are skilled in measuring outcomes of campaigns and government programmes such as energy and money saved by consumers. We could undertake follow-up research looking at levels of consumer awareness following the campaign and the likelihood that consumers went on to take a positive action.

We could offer this service outside of the Tender contract if this was something DECC was interested in pursuing.

**Proposal to deliver further work to maintain consumer awareness throughout the winter of 2015/16**

EST’s marketing and communications team is experienced in delivering year-long campaigns that build momentum and reinforce messages to consumer audiences. We suggest two follow-up campaigns to BESW which can empower community groups and partners to continue engaging consumers beyond BESW and through the winter months of 15/16. We would utilise existing consumer research and create press materials and collateral to be sold in to the GB-wide media and distributed across lead partners, broader partners and community groups. The delivery team for these campaigns would be the same team behind BESW.

## Project Timeline and milestones

| **Plan of activity** | **August** | **September** | **October** | **November** | **December** |
| --- | --- | --- | --- | --- | --- |
| Action  |  Week of: | 5 Aug | 10 Aug | 17 Aug |  24 Aug | 1 Sept | 7 Sept | 14 Sept | 21 Sept | 28 Sept | 1 Oct  | 5 Oct | 12 Oct | 19 Oct | 26 Oct |  2 Nov | 9 Nov | 16 Nov | 23 Nov | 1 Dec |   |   |   |   |
| Contract signed |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Diarise with key media and third-party advocacy partners |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Progress research questions for Ipsos MORI |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Progress off-the-shelf BESW press materials for Citizens Advice |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Establish partnership with money-saving partner: Martin Lewis or Uswitch |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Finalise BESW Ipsos MORI research questions |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Ipsos MORI undertake research  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Finalise off-the-shelf content for Citizens Advice |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Issue off-the-shelf content to Citizens Advice |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Ipsos MORI research data complete |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EST data and insight team analyse Ipsos MORI research |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EST comms team to generate first drafts of press releases X 3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| DECC to provide comment on press releases X 3; quotes from DECC SoS and Citizens Advice provided |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Final press releases X 3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Agree evaluation metrics with media and digital agencies |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EST data and insight team to calculate data for GB regions and local areas |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EST's PR agency to create 430+ localised press releases X 3 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Draft digital materials and share with DECC for comment |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Digital materials finalised |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Social media partner packs created |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Pre BESW content goes live on EST webiste |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Media angles and key messages issued to DECC and Citizens Advice |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Media coaching with key EST spokespeople |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Digital and social media packs shared with partners (DECC; Citizens Advice) and third-party advocates (including MPs) |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Potential parliamentary event to engage MPs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| BESW story 1 sold in to the GB-wide media |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| BESW website content goes live |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| BESW story 1 goes public on 21 October 00:01 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| BESW story 2 sold in to the GB media on 22 October |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| EST comms and spokespeople available on weekend on 25 & 25 October |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Potential parliamentary event to engage MPs |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| BESW story 2 goes public on 26 October 00:01 |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| BESW story 3 sold in to the GB-wide media on 27 October |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Potential for BESW story 3 to go public on October 29 00:01 (TBC) |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Continue fielding BESW media calls |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Begin gathering/analysing media & social media activity with monitoring agencies |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Evaluation continued |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Evaluation continued |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Draft evaluation report given to DECC for comment |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Final evaluation report given to DECC |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

## Skills and experience

The Project Team

**Responsible for managing BESW: Julian Roberts, Head of Communications, Energy Saving Trust**

* 12 years’ domestic energy communications experience
* Delivered more than 25 energy/money-saving campaigns at EST

Julian heads up the communications team at EST and has successfully delivered nine Energy Saving Weeks including last year’s BESW as commissioned by DECC. During his time as EST Julian was awarded winner of the best low-cost national campaign at the prestigious PR Week Awards. Under Julian’s leadership EST has built a very strong media profile and the organisation now has the largest share of voice on domestic energy (according to Precise media monitoring). A big part of his role is making sure that consumers get independent and actionable advice on how to save energy and money in the home.

Julian places stories with the national, regional, and local broadcast and print media on a daily basis and is experienced in getting key messages out to target audiences.

He is also experienced in undertaking consumer research in order to generate content to carry a campaign. Julian and team were behind last year’s BESW campaign which uncovered new insight on the public attitudes and behaviours towards switching, heating and using electricity. Julian is experienced in working with diverse partners and ensuring that campaigns are delivered in time and to budget.

**Campaign Manager: Richard Kay, Communications Manager, Energy Saving Trust**

Richard Kay played a leading role in managing the media, digital, and partner activity for the previous BESW campaign in October 2014. If successful in the Tender, Richard would be working closely with Julian managing this year’s BESW and brings experience and a proven track record of securing widespread national media coverage that is consistent with campaign messages.

Richard will be the key contact for all media and stakeholder relations to make sure the campaign is communicated clearly and effectively. He will work with marketing teams in England, Scotland and Wales to ensure alignment and consistency of messaging and will be responsible for the evaluation and reporting of PR and social media against set targets.

**Energy Saving Trust media spokesperson and insight adviser for BESW: Caitlin Bent, Insight Expert, Energy Saving Trust**

Caitlin has considerable knowledge of the energy sector and domestic energy use as part of the data and insight team at EST. Her role involves calculation of all the household energy usage statistics and associated carbon and monetary costs which are used on EST’s website and publications. She maintains an up-to-date knowledge of research into domestic energy use and the impact of different behavioural and infrastructural factors on household bills because of this.

Caitlin has worked on a number of market research projects at EST, including the October 2014 Big Energy Saving Week and EST’s UK:Pulse research. Her role in these projects was to scope out research themes and design large scale quantitative surveys to collect information on consumers’ attitudes and actions around energy use. Caitlin was also responsible for analysis of the survey results, and subsequent calculation of the potential for energy savings at individual and national levels.

**Energy Saving Trust media spokesperson: Duncan McCombie, Director of Wales, Energy Saving Trust**

Duncan is EST director leading activity across Wales and Ireland. Duncan has worked in public services and utility sectors, to Board level, delivering a broad range of government and commercial projects, in the UK and abroad. Being a key company spokesman for national media is still part of his role at EST.

Duncan has a diverse range of experience on delivering good news stories across live and recorded media channels. Hie brings gravitas and credibility to his media work. He is a Climate Change Commission member for Wales, Chair of the Existing Homes Network, sits on the Western Power Distribution Customer Panel, Wales and West Utilities Critical Friend Panel, and also represents EST across the UK. Duncan is passionate about delivering sustainable improvements, providing relevant tangible benefits for people, businesses and communities.

**Energy Saving Trust media spokesperson: David Weatherall, Policy Adviser, Energy Saving Trust**

David is one of EST’s most experienced media spokespeople and confidently presented the positive case for switching live on Good Morning Britain during BESW 2014 in response to The Sun’s negative front page story on switching.

David Weatherall’s career in home energy began as coordinator with the Energy Efficiency Partnership for Homes, where he worked with all the principal commercial, government and NGO stakeholders in the area. David now works as the Policy Advisor for Energy Saving Trust and also undertakes policy research as co-Director of Future Climate. He has worked closely with government on the evolution of energy efficiency and fuel poverty policy, and is particularly proud of having done much of the early research work to make the case for a greater focus on cold homes in the private rented sector. Most recently David has delivered, for Future Climate, research into HMOs for eaga Charitable Trust, work undertaken with Manchester University.

For the Energy Saving Trust he has recently written the “Pulse” quantitative consumer research study into attitudes to home energy upgrades. David also works at a European level particularly on issues relating to the Energy Performance of Buildings Directive through EnR - the European network of national energy agencies.

**ESAS co-ordinator: Julie Wood, Senior Programme Manager, Energy Saving Trust**

Julie oversees the day-to-day management of the Energy Saving Advice Service (ESAS) and will coordinate EST activities between Big Energy Saving Week and ESAS delivery.

Julie acts as point of contact for many Policy Officials at DECC and specifically those managing the ESAS Contract within the Home Energy Directorate.

By working with Knowledge and Training colleagues, Julie will ensure that the campaign messages and promotion (particularly those that refer to the ESAS number) are briefed in to all Advisers within the contact centre. She will also be able to extract ESAS CRM data for impact analysis and reporting.

We will use three suppliers to help us deliver the project:

1. **Weber Shandwick PR agency**Weber Shandwick will support our in-house team in selling in the stories to the GB-wide media as well as supporting EST digital consumer engagement and evaluation. EST has worked with Weber Shandwick for eight years and they have a proven track-record of delivering. The company supported EST in last year’s BESW campaign.
2. **OPX the strategic brand and communications agency**
OPX will work with EST to create the campaign digital collateral. OPX supported EST in last year’s BESW campaign.
3. **Cision UK, a media monitoring and analysis company**
Cision will monitor and analyse all of the BESW media coverage and use metrics to measure the success of the campaign.
4. **Ipsos MORI, leading market research company in the UK and Ireland**Ipsos MORI will work with EST to undertake the consumer research survey that will inform the three news stories.

## Deliverables of team members

|  |  |  |
| --- | --- | --- |
| **NAME AND GRADE** | **TASKS AND RESPONSIBILITIES** | **DAYS ALLOCATED** |
| Julian Roberts; grade: Head of | **Responsible for managing the project*** Oversee consumer research
* Oversee development of media stories
* Oversee development of partner collateral
* Oversee digital/social media campaign
* Oversee delivery of PR, marketing and digital agency support
* Working with partner leads to ensure a joined-up and collaborative approach
 | 12 |
| Richard Kay; grade: Manager | * Write press releases, Q&As
* Produce and issue partner collateral packs
* Manage social media campaign
* Manage the media; fieldi calls, set up briefings, brief in spokespeople
* Work with PR agency to sell-in the stories
* Make sure content is provided to EST’s web team
 | 15 |
| Caitlin Bent; grade: Executive | * Undertake consumer research
* Analyse research data
* Produce data and insight for the 430+ tailored press releases
* Act at EST expert spokesperson
 | 8 |
| Duncan McCombie; grade: Director | * Act as EST most experienced spokesperson
 | 1 |
| David Weatherall; grade: Senior Manager | * Acting as an experienced media spokesperson
 | 1 |
| Julie Wood; grade: Senior Manager | * Coordinate the campaign with ESAS
 | 1 |

# Risk Assessment and Mitigation

|  |  |  |
| --- | --- | --- |
| **RISK** | **RISK IMPACT** | **MITIGATION** |
|   |  |  |
|  |  |   |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

# Appendices

## Statement of Non-Collusion

## Form of Tender

## Conflict of Interest

## Questions for tenderers

## Annex A Pricing Schedule

## Declaration 1: Statement of non-collusion

To: The Department of Energy and Climate Change

1. We recognise that the essence of competitive tendering is that the Department will receive a bona fide competitive tender from all persons tendering. We therefore certify that this is a bona fide tender and that we have not fixed or adjusted the amount of the tender or our rates and prices included therein by or in accordance with any agreement or arrangement with any other person.

2. We also certify that we have not done and undertake not to do at any time before the hour and date specified for the return of this tender any of the following acts:

1. communicate to any person other than the Department the amount or approximate amount of our proposed tender, except where the disclosure, in confidence, of the approximate amount is necessary to obtain any insurance premium quotation required for the preparation of the tender;
2. enter into any agreement or arrangement with any other person that he shall refrain for submitting a tender or as to the amount included in the tender;
3. offer or pay or give or agree to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any person doing or having done or causing or having caused to be done, in relation to any other actual or proposed tender for the contract any act, omission or thing of the kind described above.

3. In this certificate, the word “person” shall include any person, body or association, corporate or unincorporated; and “any agreement or arrangement” includes any such information, formal or informal, whether legally binding or not.



……………………..………………………………........

Signature (duly authorised on behalf of the tenderer)

…………Matthew Percy………………………………

Print name

…………Energy Saving Trust……………………….

On behalf of (organisation name)

…………23rd July 2015……………………………….

Date

## Declaration 2: Form of Tender

To: The Department of Energy and Climate Change

1. Having considered the invitation to tender and all accompanying documents

(including without limitation, the terms and conditions of contract and the Specification) we confirm that we are fully satisfied as to our experience and ability to deliver the goods/services in all respects in accordance with the requirements of this invitation to tender.

2. We hereby tender and undertake to provide and complete all the services required to be performed in accordance with the terms and conditions of contract and the Specification for the amount set out in the Pricing Schedule.

3. We agree that any insertion by us of any conditions qualifying this tender or any unauthorised alteration to any of the terms and conditions of contract made by us may result in the rejection of this tender.

4. We agree that this tender shall remain open to be accepted by the Department for 8 weeks from the date below.

5. We understand that if we are a subsidiary (within the meaning of section 1159 of (and schedule 6 to) the Companies Act 2006) if requested by the Department we may be required to secure a Deed of Guarantee in favour of the Department from our holding company or ultimate holding company, as determined by the Department in their discretion.

6. We understand that the Department is not bound to accept the lowest or any tender it may receive.

7. We certify that this is a bona fide tender.



…………………………………………………………………………........

Signature (duly authorised on behalf of the tenderer)

…………Matthew Percy………………………………

Print name

…………Energy Saving Trust……………………….

On behalf of (organisation name)

…………23rd July 2015……………………………….

Date

## Declaration 3: Conflict of Interest

I have nothing to declare with respect to any current or potential interest or conflict in relation to this campaign (or any potential providers who may be subcontracted to deliver this work, their advisers or other related parties). By conflict of interest, I mean, anything which could be reasonably perceived to affect the impartiality of this campaign, or to indicate a professional or personal interest in the outcomes from this campaign.

Signed 

Name Matthew Percy

Position Commercial Development Manager

***OR***

I wish to declare the following with respect to personal or professional interests related to relevant organisations\*;

* X
* X

*Where a potential conflict of interest has been declared for an individual or organisation within a consortia, please clearly outline the role which this individual or organisation will play in the proposed project and how any conflict of interest has or will be mitigated.*

* X
* X

Signed …………………………………….

Name …………………………………….

Position …………………………………….

Please complete this form and return this with your ITT documentation - Nil returns **are** required.

**\*** These may include (but are not restricted to);

* A professional or personal interest in the outcome of this research
* For evaluation projects, a close working, governance, or commercial involvement in the project under evaluation
* Current or past employment with relevant organisations
* Payment (cash or other) received or likely to be received from relevant organisations for goods or services provided (Including consulting or advisory fees)
* Gifts or entertainment received from relevant organisations
* Shareholdings (excluding those within unit trusts, pension funds etc) in relevant organisations
* Close personal relationship or friendships with individuals employed by or otherwise closely associated with relevant organisations

***All of the above apply both to the individual signing this form and their close family / friends / partners etc.***

If your situation changes during the project in terms of interests or conflicts, you must notify DECC straight away.

A DECLARATION OF INTEREST WILL NOT NECESSARILY MEAN THE INDIVIDUAL OR ORGANISATION CANNOT WORK ON THE PROJECT; BUT IT IS VITAL THAT ANY INTEREST OR CONFLICT IS DECLARED SO IT CAN BE CONSIDERED OPENLY.

## Declaration 4: Questions for tenderers

In some circumstances the Department is required by law to exclude you from participating further in a procurement. If you cannot answer ‘no’ to every question in this section it is very unlikely that your application will be accepted, and you should contact us for advice before completing this form.

Please state ‘Yes’ or ‘No’ to each question.

|  |  |
| --- | --- |
| **Has your organisation or any directors or partner or any other person who has powers of representation, decision or control been convicted of any of the following offences?** | **Answer** |
| 1. conspiracy within the meaning of [section 1](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23section%251%25sect%251%25num%251977_45a%25&risb=21_T12077301839&bct=A&service=citation&A=0.2630909849289865) or 1A of the Criminal Law Act 1977 or article 9 or 9A of the Criminal Attempts and Conspiracy (Northern Ireland) Order 1983 where that conspiracy relates to participation in a criminal organisation as defined in Article 2 of Council Framework Decision 2008/841/JHA;
 | No |
| 1. corruption within the meaning of [section 1](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23section%251%25sect%251%25num%251889_69a%25&risb=21_T12077301839&bct=A&service=citation&A=0.774070316337072)(2) of the Public Bodies Corrupt Practices Act 1889 or [section 1](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23section%251%25sect%251%25num%251906_34a%25&risb=21_T12077301839&bct=A&service=citation&A=0.24433813672949012) of the Prevention of Corruption Act 1906; where the offence relates to active corruption;
 | No |
| 1. the offence of bribery, where the offence relates to active corruption;
 | No |
| 1. bribery within the meaning of section 1 or 6 of the Bribery Act 2010;
 | No |
| 1. fraud, where the offence relates to fraud affecting the European Communities’ financial interests as defined by Article 1 of the Convention on the protection of the financial interests of the European Communities, within the meaning of:
 | No |
| 1. the offence of cheating the Revenue;
 | No |
| 1. the offence of conspiracy to defraud;
 | No |
| 1. fraud or theft within the meaning of the [Theft Act 1968](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23num%251968_60a_Title%25&risb=21_T12077301839&bct=A&service=citation&A=0.35766330215827113), the Theft Act (Northern Ireland) 1969, the Theft Act 1978 or the Theft (Northern Ireland) Order 1978;
 | No |
| 1. fraudulent trading within the meaning of [section 458](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23section%25458%25sect%25458%25num%251985_6a%25&risb=21_T12077301839&bct=A&service=citation&A=0.5972529271560607) of the Companies Act 1985, article 451 of the Companies (Northern Ireland) Order 1986 or section 993 of the Companies Act 2006;
 | No |
| 1. fraudulent evasion within the meaning of section 170 of the [Customs and Excise Management Act 1979](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23num%251979_2a_Title%25&risb=21_T12077301839&bct=A&service=citation&A=0.22540552446837803)  [or section 72 of the Value Added Tax Act 1994](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23num%251994_23a_Title%25&risb=21_T12077301839&bct=A&service=citation&A=0.9838628229561671);
 | No |
| 1. an offence in connection with taxation in the European Union within the meaning of section 71 of the Criminal Justice Act 1993;
 | No |
| 1. destroying, defacing or concealing of documents or procuring the execution of a valuable security within the meaning of [section 20](http://www.lexisnexis.com:80/uk/legal/search/runRemoteLink.do?langcountry=GB&linkInfo=F%23GB%23UK_ACTS%23section%2520%25sect%2520%25num%251968_60a%25&risb=21_T12077301839&bct=A&service=citation&A=0.5036676212568264) of the Theft Act 1968 or section 19 of the Theft Act (Northern Ireland) 1969;
 | No |
| 1. fraud within the meaning of section 2, 3 or 4 of the Fraud Act 2006; or
 | No |
| 1. making, adapting, supplying or offering to supply articles for use in frauds within the meaning of section 7 of the Fraud Act 2006;
 | No |
| 1. money laundering within the meaning of section 340(11) of the Proceeds of Crime Act 2002;
 | No |
| 1. an offence in connection with the proceeds of criminal conduct within the meaning of section 93A, 93B or 93C of the Criminal Justice Act 1988 or article 45, 46 or 47 of the Proceeds of Crime (Northern Ireland) Order 1996; or
 | No |
| 1. an offence in connection with the proceeds of drug trafficking within the meaning of section 49, 50 or 51 of the Drug Trafficking Act 1994; or
 | No |
| 1. any other offence within the meaning of Article 45(1) of Directive 2004/18/EC as defined by the national law of any relevant State.
 | No |

**ANNEX A – PRICING SCHEDULE**

**Bidder:**

*Energy Saving Trust Ltd*

|  |  |
| --- | --- |
| **Description** | **Price £** |
| Items 1 to 2  | £59,950 |
| Item 3  | £19,250 |
| **Total ex VAT** | **£79,200** |
| **Total VAT** | **£15,840** |
| **Total** | **£95,040** |

**Refer to Section 2 (Specification of Requirements), Section 4 (Criteria, Deliverables and Timetable Required), pages 9-10 for full details**