

Tender documentation for Strategic Communications Support

1. Summary and overview of services required:

The National Army Museum is looking to identify a partner who will develop a communications strategy and approach. This will include creating an overarching communications and messaging framework to compliment the Museum's audience segments and will also allow the Museum to talk with consistency and relevance. In addition, we are seeking a partner who can provide ongoing communications support and consultancy across this and other projects, as required.

We are looking to shortlist and appoint a suitable partner before the end of March 2020. We anticipate that the majority of the work will take place in 6 months that follow appointment and then the on-going communications support lasting for a further 6 months in the first instance.

The Museum will establish a project team and expect to work closely with the chosen partner to deliver this project. The project team will include the Museum Director, along with other senior staff and the wider Marketing & Communications Team.

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

- Background on the Museum (and more information about the project)
- Scope of services
- Budget
- Indicative timescale
- Tender Process

2. Background

2.1 Museum

Founded by Royal Charter in 1960, the National Army Museum was established to collect, preserve and exhibit objects relating to the history of the Land Forces of the Crown. Having initially been set up in Sandhurst, the Museum moved to its current site in Chelsea in 1971. The Museum maintains a presence in Sandhurst with a dedicated collection held within the Indian Army Memorial Room. The Museum's collection store at Stevenage ensures that our non-display collection is maintained whilst overseeing the maintenance and care of the on-display collection. Combined with the on-display collection and archives at Chelsea the Stevenage site also allows access to the Museum's collection to the public.

Over a 10-year period the Museum has seen visits to Chelsea of between 230,000 and 270,000 annually with the collection at Sandhurst viewed by approximately an additional 20k people per year.

In 2014 the Museum closed and underwent a £24 million capital redevelopment project which saw the wholesale transformation of the Museum building. Transforming the space to house 5 new permanent galleries, a temporary exhibition space, archive and research facility, learning spaces, retail and café outlets and an enhanced visitor experience. This was underpinned by a

new interpretive approach, brand and ethos. In March 2017, the newly transformed and contemporary National Army Museum opened its doors to the public after a three-year closure.

2.2 Attracting new visitors

The new museum opened at the end of March 2017. A key objective for the redevelopment project was to help broaden the appeal of the Museum to wider audiences, and to this end, our visitor targets were ambitious.

During the years of closure and the also in the opening year many major central London attractions suffered from declining visitor numbers. This sector trend alongside the decline in awareness due to the closure of the Museum meant that the Museum struggled to achieve the highs normally associated with re-opening year.

Overall there has been a positive reaction to the new museum. Our new audiences that have been gained along with the returning families have been positive about the design and approach of the Museum, the enhanced soft play offer Play Base has been popular and generated a new repeat audience. There has however been mixed reactions from our more traditional visitors. They have been less satisfied with the use of space, perceived weakness in the narrative and lack of chronology of the galleries. This manifested itself through complaints and reduced visits. Whilst new audience visits increased, the numbers seen did not make up for the shortfall represented from the loss in traditional audiences and in the year following reopening visitor figures fell below pre closure levels.

By the end of the second year of reopening (2018/19) the Museum began to attract a more mixed audience. Driven by a new approach to its public programme, a successful temporary exhibition schedule, a growing school's audience and an increase in repeat visits (particularly to Play Base) the Museum saw an increase in visits compared to its reopening year. This positive result has increased confidence in the ability for the Museum to grow its audience with an aspiration for 5% year on year audience growth over the next 5 years.

2.3 National Army Museum's audiences

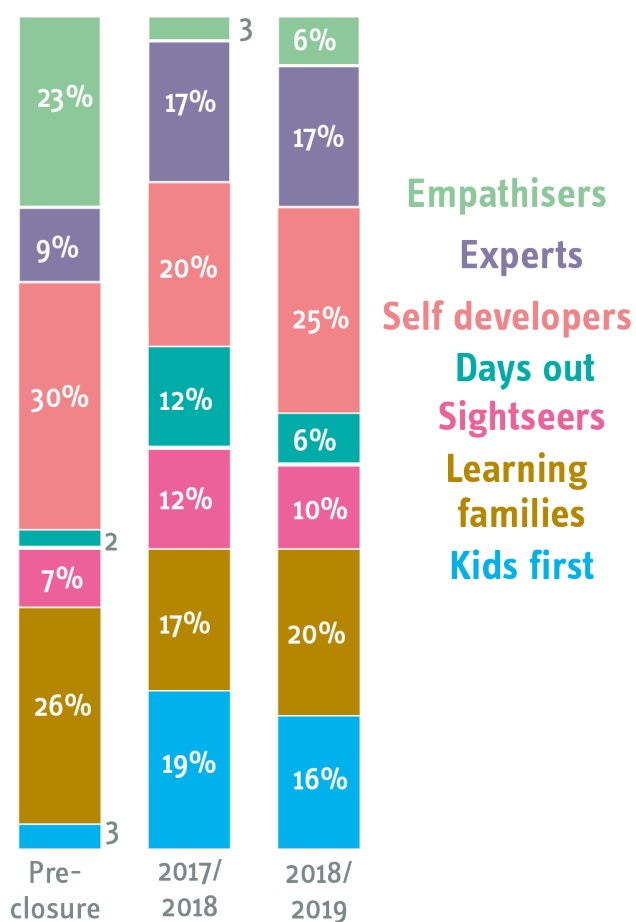
Before closure, the Museum developed an audience segmentation model based on visitors' main motivations and needs. This split the audiences into the seven segments, driven by visit mode. These segments informed the redesign of the Museum, its public programme as well as its approach to messaging.

Overview of segmentation Model 2017/18:

Segment	Description
Sightseers	First time visitors making a general visit. Mainly tourists wanting to 'do' the Museum
Days Out	Repeat visitors wanting to enjoy a social visit, possibly with friends or relatives
Self-Developers	Non-specialists wanting to informally improve general knowledge

Experts	Academics, students, people with specialist knowledge wanting to deepen knowledge.
Empathisers	Have a personal connection to subject, wanting to engage with collection emotionally and spiritually
Kids' First	Mixed age groups, wanting fun and social trip for children and whole family
Learning Families	Mixed age groups, wanting an educational trip for children

Visit modes: proportion of visits from pre-closure to 2018/19



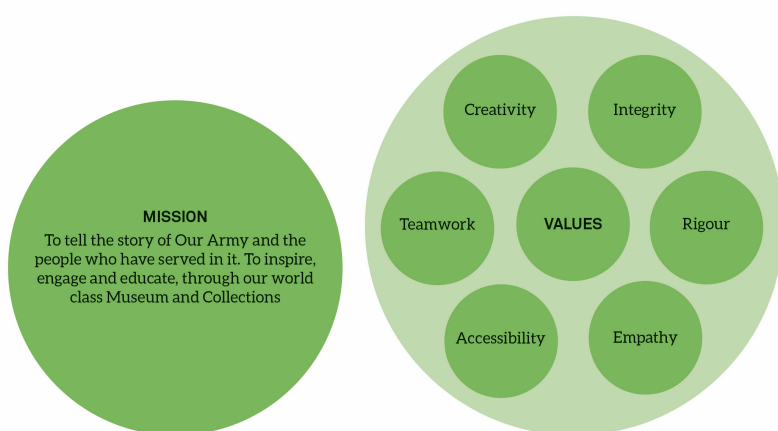
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A new segmentation is being developed, as the previous audience segments (shown above) were not actionable, due to them being based on visit modes. This will be completed and shared to those shortlisted for this project.

2.4 The Museum's values

In 2018 the Museum updated its Mission and Values:

- *Mission: To tell the story of Our Army and the people who have served in it. To inspire, engage and educate, through our world class Museum and Collections*
- *Values: Integrity, Rigour, Empathy, Creativity, Teamwork, Accessibility*



2.5 New Museum strategy

Launched at the end of 2019, the Museum has recently outlined its new business strategy, encompassing a 5-year plan. There are five key areas of focus for the museum, one of which is how we develop and engage with our audiences.

The strategy is built around 5 strategic lines of development:

Audience

The Museum will focus on understanding, segmenting, connecting and mobilising its audiences to visit. Using its varied programme, and continually improving its interpretive approach, the Museum will seek to engage new audiences whilst also building loyalty.

Inspiring and engaging our visitors through onsite experience and digital engagements, the Museum wants to connect with its audiences in a way which is relevant and connects with them on a personal level.

Research

The Museum will act as a convener for subject experts, regarded as a leading authority on the history and traditions of Our Army. Enabling research both internally and externally by providing

access to our collection the Templar Study Centre will be a key place to conduct research on the history of Our Army the Museum enabling new research whilst also co-commissioning with partners.

The Museum will facilitate open debate around the history of Our Army and its soldiers with our staff having a public presence in public debate.

Collections

The Museum will continue to maintain and develop its world class collections with a full digital access to the collection along with descriptions which have sufficient granularity to guide those conducting research or exploring family history.

The Museum will safeguard and make accessible it's collections to the widest possible audience.

Partners

Working with partners the Museum will foster a strong network of supporters. Creating strong links with the Army the Museum will have its support. The Museum will enable and support networks of Military Museums and Heritage organisations in the UK and beyond.

The Museum will also work closely with veteran charities and develop its links with specialist societies.

People, Process, Resources

The Museum will have a defined and sustainable Development Plan and be driven by core business processes which emphasise team working. The Museum will develop and retain talent with high performance and culture.

The Museum will generate increased sources and level of revenue with self-earned income generating in excess of £3 Million.

2025 End State

By April 2025 the National Army Museum will be an inspiring, vibrant and successful World Class National Museum with an annual footfall above 300,000 and a digital audience of 3 million. Dedicated to the history of Our Army and the soldiers who served in it. Regarded as authoritative, nationally and internationally, sitting at the heart of a thriving national Military History ecosystem. Regarded as the default heritage partner by the British Army and specialist societies of subject experts. An institution where the staff have an understanding and empathy for the Army and a real commitment to the cause of telling Our Army's story. An agile institution that puts ideas into action swiftly and is enabled through efficient processes and strong finances. A place where people love their work and as part of an inclusive team feel that they can develop and grow as professionals and volunteers.

3. Scope of services

As we approach 3 years following reopening the Museum is keen to use what it has learnt to improve the way in which we communicate and engage with our audiences. The Museum has created a 5-year strategy, Master Narrative (the guiding principle for the story the Museum has to tell) and a new audience segmentation model. This has allowed the Museum to re-align its priorities and targets.

As part of our ongoing development of the Museum we are now looking to produce coherent and consistent strategic messaging. Working with our existing mission and values and referencing our master narrative we require a strategic communications framework that the Museum and its staff can use across all channels. It will also further develop our audience segmentation model.

Outline of potential scope of work to include:

Phase 1: Value proposition

Develop value proposition for the NAM – how should our mission and values manifest themselves in our communications with our audiences.

Deliverables: Written articulation of value proposition and creative examples of how this might translate to external communications -e.g. advertising/website copy

Phase 2: Persona development and messaging framework

Build upon our audience segmentation work to produce granular personas that we can test and use

Deliverables: Granular and identifiable persona to support communications which are aligned to our segmentation work.

External messaging framework: Develop an external messaging framework that provides a bridge between the new 'master narrative' and our audience groups.

Deliverables: Series of core messages and content examples to underpin external communications

Phase 3: Ongoing strategic communications consultancy & support

Across the year, provision of ad-hoc support for Museum communications messaging to provide a consistent touchpoint for messaging.

We would like the tender to include an overview of each section of work, including a proposed approach and scoping of the work, associated budget, timescale and detailed deliverables.

Where appropriate, please include examples of outputs and deliverables.

4. Budget

This work will have a maximum budget of £40k (not to be exceeded), to include an element of retainer for ongoing communications support for the year.

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

- a. Professional fees
- b. Development costs
- c. Travel and expenses
- d. Accommodation
- e. Disbursements
- f. Visuals
- g. An estimate of any contingency
- h. All third-party fees
- i. Report, printing and presentation costs
- j. All other expenses and costs required in the delivery of the project.
- k. The fees should indicate if they include or exclude VAT.

5. Timetable

The following timetable is indicative only – only tender closing dates are secured, all else is subject to change but should be used as a guide to delivery.

Publish tender – tender live	w/c 19/12/19
Close tender	20/01/20
Shortlist partners	22/1/20
Interview panel	w/c 27/1/20
Appoint partner	w/c 10/2/20
Scope work	w/c 17/2/20
Commence project	w/c 24/2/20
Phase 1 deliverables	17/4/20
Phase 2 deliverables	29/5/20
Phase 3 Strategic communications support	Ongoing – until end March 2021

6. Tender process

6.1 Tender requirements

a. Response to the brief should demonstrate:

- An understanding of the Museum and its audiences / challenges
- An outline and examples of how you would approach the scope of work and your proposed approach

- An outline work plan identifying key dates of all elements and sign off points
- Identification of team members, including sub-contractors if relevant
- Name and contact details of two clients with whom the agency has worked with recently who could be approached for references before confirmation of appointment.
- Fee proposals: the fee is to be a fixed lump sum for the agency(ies) in the provision of the relevant project strands as outlined in the Scope of Services.
- Submissions will be shortlisted and those selected will be interviewed and their tender proposal explored further.

b. Insurance

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

c. Financial

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

d. All company documentation as requested below:

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

6.2 Tender return

All tender documents/electronic media are to be addressed to Secretariat or tenders@nam.ac.uk and annotated with “**2020 National Army Museum Strategic Communications Tender**” 12 noon on Monday 20 January 2020. On no account are the tender documents to be passed to the requesting department before the tender board date.

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

Address for the return of hard copy tenders:

Secretariat
National Army Museum
Royal Hospital Road
Chelsea
London
SW3 4HT

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

6.3 Tendering costs

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

6.4 Contract award criteria

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

- Director: National Army Museum
- Assistant Director: Enterprise
- Head of Marketing & Communications

Subsequent interviews panel attendees will be confirmed after shortlisting stage

Tenders will be assessed on the following criteria:

- | | |
|----------------------------------|-----|
| • Response to brief | 50% |
| • Fee | 20% |
| • Relevant experience | 10% |
| • Project team and support model | 20% |

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

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

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

6.5 Enquiries

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

Linda Stranks, Head of Marketing & Communications, National Army Museum

Email: lstranks@nam.ac.uk

Enquiries should be submitted between 6th January and 15th January 2020. Enquiries will be answered within three working days and may be shared with all tenderers expressing an interest in the project.

ANNEX A – FORM OF TENDER

Tender for: [Insert title and address of work](#)

To: The Council and Director of the National Army Museum

Sirs,

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

For the sum as listed in the attached document:

Tenderer Reference:

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

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

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

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

Signed: _____

In the capacity of

Duly authorised to sign the tender on behalf of:

Date:

APPENDIX B – CERTIFICATE OF BONA-FIDE TENDER

Tender for: [Insert title and address of work](#)

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

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

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

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

Signed: _____

In the capacity of

Duly authorised to sign the tender on behalf of:

Date:

C SUPPLIER STATEMENT

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

Signed by: _____

Name: (in BLOCK LETTERS) _____

Title: _____

Date: _____

for and on behalf of: _____

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