****HLF website user research and communications recommendations****

**Organisation Heritage Lottery Fund**

**Department** Communications

**Title of procurement HLF website user research and communications recommendations**

**Brief description of supply** User research to explore how the HLF website and its digital channels can reach wider audiences - to inform its future website content and development.

**Estimated value of tender** £30,000 incl. VAT

**Estimated duration** Two months

**Name of HLF Contact** Tom Scott, Website and Digital Manager

**Timetable** Response deadline: 28 August 2017

Confirmation of contract: 4 September 2017

Completion of research: 27 October 2017

**Contract number: Finance No. 206**

# Introduction to HLF

Using money raised through the National Lottery, HLF gives grants to sustain and transform a wide range of heritage across the UK. From museums, parks and historic places to archaeology, natural environment and cultural traditions, we invest in every part of our diverse heritage, making a lasting difference for heritage and people.

This year, we will allocate around £300million to projects in England, Northern Ireland, Scotland and Wales. Since 1994, HLF has awarded £7.7billion to more than 42,000 projects across the UK.

We are a ‘non-departmental public body’. This means that, although we are not a government department, the [Secretary of State for Digital, Culture, Media and Sport](http://www.culture.gov.uk/) issues financial and policy directions to us, and we report to Parliament through this Department. Our decisions about individual applications and our policies are independent of government.

## Background

The current HLF website was launched three years ago using the Drupal content management system. It is structured into six main areas (About us, Projects, Looking for funding, Apply, Running your project, Our community) which correspond to previously created user personas – weighted towards our applicants. It has over 100,000 users per quarter.

In order to make this site accessible to a wide audience we have worked closely with our developers towards WCAG 2.0 to the level of priority 2 (double-A compliance).

## Post-launch website survey

Two years ago, we commissioned a digital agency to review the site to see whether we were meeting the needs of our users. The full review will be made available to the successful agency. However, the review revealed the following findings:

* HLF provides content in a way that’s useful and relevant to applicants
* Almost 90% of survey respondents said they found site content useful or very useful
* Steps could be taken to engage the advocate audience (opinion-formers and general public) more deeply
* Be bolder with messaging about the impact of heritage investment

## Other research

We will share recent research into perceptions of HLF, which are informing our future direction - as well as the Google Analytics of the site.

# Requirements/ Specification

We now want to re-develop the website to coincide with the launch of a new funding strategy in 2019, and are commissioning this research to inform the content and information architecture of the new site.

HLF's 2017-18 business plan has made promoting the National Lottery brand and demonstrating the value of heritage as a good cause a corporate priority. This is likely to be endorsed in a forthcoming Corporate Strategy.

The website needs to prioritise:

* A strengthened focus on National Lottery players in our communications and advocacy
* Improving recognition and awareness of the National Lottery while promoting heritage as a TNL good cause, amongst the public
* Building on HLF’s profile as a sector leader, communicating the impact of our funding

Therefore, to complement those applying for funds or running projects, there needs to be a focus on how we can **meaningfully reach and engage the wider public and opinion-formers** with an aim of increasing awareness of National Lottery funding for heritage and showcasing the difference heritage makes in people's lives. There is an aspiration to give this audience parity with our applicant/grantee audience.

The research should explore what content these audiences would expect of HLF (if at all) – beyond our remit as a grant-giver aiming to attract and help applicants for funding. It should also recommend how relevant areas of our website should be presented to allow for efficient user journeys.

# Submissions

We are inviting the submission of proposals, which should include the following:

1. Proposed methodology, including user recruitment
2. Evidence of how you helped other organisations expand their digital audiences, with examples
3. Budget breakdown, timescales and potential pain points/issues

# Outputs

The following outputs should be considered:

* Quantitative and qualitative user testing
* New portfolio of user personas and expert UX review
* Presentation(s) of findings
* Content recommendations

All reports must adhere to HLF’s accessibility and formatting guidance (appended).

The initial findings will be confidential to HLF. HLF may prepare or commission summary reports and other materials for subsequent wider distribution, based on the results.

All reports to include appendices as agreed between HLF and the contractor. The contents and structure of the report to be agreed in advance of writing. All reports to be supplied in electronic format and hard copy if requested.

All bidders are required to adhere to all appropriate regulations and guidelines on the collection, storage, transmission and destruction of personal data ([MRS/SRA, Data Protection Act 1998: Guidelines for Social Research, April 2013](https://www.mrs.org.uk/pdf/2013-04-23%20MRS%20SRA%20-%20DP%20Guidelines%20updated.pdf)).

# Contract management

We expect the project to begin by 8 September 2017 and final reports to be submitted to HLF by 28 October 2017.

The contract will be let by the National Heritage Memorial Fund.

The payment schedule will be full fee paid on completion of the contract.

The contract will be based on the HLF standard terms and conditions, which include the requirement of Professional Indemnity Insurance (not less than £50,000 cover) and Public Liability Insurance of £500,000.

The research will be managed on a day to day basis for HLF by Tom Scott, Website and Digital Manager.

# Award Criteria

| **Quality Criteria** | **Weighting** |
| --- | --- |
| Project approach, methodology and outputs | 40% |
| Previous experience of similar projects | 20% |
| Allocation of budget | 20% |
| Timings / schedule for delivery | 20% |

**Price Criteria: (firm and fixed costs** **until 31st March 2018).**

| **Cost** | **Post 1 @cost per day**  **(No of days)**  *e.g. Project Manager/ Director*  *@ £25.00* | **Post 2 @cost per day**  **(No of days)**  *e.g. Senior Consultant/manager/researcher*  *@£10.00* | **Post 3 @cost per day**  **(No of days)**  *Junior*  *Consultant/equivalent*  *e.g. £5.00* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Fund | *e.g. 0.5* | *1* | *1.5* | *3* | *30.00* |
| *[Add as necessary]* | - | - | - | - | - |
| *[Add as necessary]* | - | - | - | - | - |
| *[Add as necessary]* | - | - | - | - | - |

| Cost Type | Value (£) |
| --- | --- |
| Sub - Total | **-** |
| VAT | **-** |
| Total\* | **-** |

\* (This must include all expenses as well as work costs; this figure will be used for the purposes of allocating your score for the price criterion and must cover the cost of meeting all our requirements set out in the ITT)

*Notes: HLF reserves the right to reject abnormally low tenders. HLF reserves the right to amend the timetable of work where required.*

# Procurement Process

HLF reserves the right to reject abnormally low **QUALITY** tenders and to negotiate with all bidders. HLF reserves the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.

The procurement timetable will be:

Tender return deadline: completed proposal to be returned to HLF by 12 NOON 28th August 2017.

HLF will notify bidders of our procurement decision w/c 4 September*.*

Your tender proposals must be sent electronically via e-mail before the tender return deadline of 12 NOON 28th August 2017 to the following contact:

Tom Scott

Website and Digital Manager

Heritage Lottery Fund

Holbein Place

London

SW1W 8NL

Email: [tom.scott@hlf.org.uk](mailto:tom.scott@hlf.org.uk)

Tel: 020 7591 6219

Please visit the [HLF website](http://www.hlf.org.uk/Pages/Home.aspx) for further information about the organisation.

# Appendix: Accessibility and formatting guidance

HLF is committed to providing a website that is accessible to the widest possible audience. Our website is annually tested by accessibility auditors and we must meet the WCAG 2.0 AA compliance level. Our accessibility testing covers all of our content, including downloadable documents, as well as the design and functionality of the site.

Reports and other documents created for HLF (**including the tender submissions**) need to be clear, straightforward to use, and ready to circulate internally, externally and online, as well as suitable for use by screen reading software. Tips for creating accessible documents can be found below. However, we strongly recommend referring to the RNIB, Gov.uk and WebAIM for more detailed information.

## Readability

In the final report, and all other documents that may be published online including the tender application consultants should ensure that:

* The size of the font is at least 11pt;
* There is a strong contrast between the background colour and the colour of the text. Black text on a white background provides the best contrast. This also applies to any shading used in tables and/or diagrams;
* Italics are only used when quoting book titles for citations and items on the reference list should be arranged alphabetically by author
* Colour formatting and use of photos should be of a resolution size that is easily printable and does not compromise the printability of the document.

For further guidance on ensuring readability of printed materials, please refer to the RNIB Clear Print guidelines. These can be found on the [RNIB website](http://www.rnib.org.uk/Pages/Home.aspx).

# Accessibility

Reports should adhere to the following guidelines:

## Formatting

Headings and content in your document should be clearly identified and consistently formatted, to allow easy navigation for users. Heading Styles should be used to convey both the structure of the document and the relationship between sections and sub-sections of the content.

## Spacing

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

## Alternative text

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

## Images

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

## Tables

These should be for used for presenting data and not for layout or design. They should also be simple, and include a descriptive title.

## Additional documents

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

## Acknowledgement

All reports should acknowledge HLF. Our logo can be found on the [HLF website](http://www.hlf.org.uk/grantholders/acknowledgement/Pages/Logosandacknowledgement.aspx).

## Further resources

Please refer to the links below for further information:

* ['Microsoft Word: creating accessible documents' - webaim.org](http://webaim.org/techniques/word/)
* ['How to create an accessible PDF' - GOV.UK](https://www.gov.uk/guidance/how-to-publish-on-gov-uk/accessible-pdfs)

We also recommend using an accessibility consultant to help you produce your reports. Agencies that HLF have worked with include [Shaw Trust](http://webacc.shaw-trust.org.uk/) and [The Accessible Digital Documents Company](http://www.accessible-digital-documents.com/).

HLF retains the right to amend documents in order to create accessible versions for publishing.