BRIEF:

**Organisation The National Lottery Heritage Fund**

**Department** Marketing and Communications

**Title of procurement Brand Development**

**Brief description of supply**

Refresh our brand with a compelling brand strategy and visual identity, so we can realise the full potential of The National Lottery Heritage Fund. Create robust brand guidelines and inspire those we support to be more creative in how they acknowledge our investments – from community projects to renowned national heritage organisations.

**Estimated value of tender** £60K (exclusive of VAT)

**Estimated duration** June to beginning of October 2020, c.18 weeks

**Name of Heritage Fund Contact** Jill Cochrane, Director of Marketing & Communications

**Timetable** **Response deadline: noon, 6 May 2020**

Deadline for questions: noon, 27 April 2020

Deadline for response to questions: noon, 30 April 2020

Shortlist: 12 May 2020

**Presentations: 20 May 2020 (virtual presentations)**

Confirmation of contract: 25 May 2020

Commencement of project: June 2020

**Completion of project: 5 October 2020**

**Contents**

1. Introduction
   1. Purpose of the brief
   2. About us
   3. Logo and name change in 2019
2. Project brief
   1. Project objectives
   2. Project scope and outputs
3. Outline process
4. Key audiences and stakeholders
5. Contract management
6. Award criteria
7. Procurement process

**Appendix**

1. Brand Guidelines The National Lottery Heritage Fund (Stage 2)
2. The National Lottery Heritage Fund Style Guide
3. Strategic Funding Framework 2019-2024 (our investment strategy)
4. Examples of collateral produced by The National Lottery Heritage Fund
5. Examples of co-branding/acknowledgement by grant recipients
6. Accessibility and formatting guidance (including legal requirements)
7. Country specific versions of our visual identity – Wales, NI, Scotland
8. Values with descriptors

# 1. Introduction

**1.1. Purpose of the brief**

This is a fantastic opportunity to refresh The National Lottery Heritage Fund brand. We are seeking a creative and strategic brand agency, to work with us to deliver the creative development of our brand, including brand strategy and identity. The project will also involve developing an inspirational approach to how our funding investments are acknowledged by grant recipients and partners (co-branding). We also need a more cohesive set of brand guidelines to bring our brand to life.

A specialist agency with both strategic and creative capabilities in-house is essential.

# 1.2. About us

The [**National Lottery Heritage Fund**](http://www.heritagefund.org.uk) is the UK’s leading and only dedicated funder of heritage and the only heritage organisation that operates across England, Northern Ireland, Scotland and Wales. We are one of the 12 National Lottery good causes – distributing money raised by National Lottery players through the purchases of National Lottery tickets.

Drawing on our 25 years’ experience as an expert funder, we support and invest in the breadth of heritage, including buildings, museums, natural heritage and the heritage of cultural traditions and memories. We champion innovation in business models, and build capacity, skills and resilience in heritage organisations to enable them to diversify their income and be stronger for the future. We aim to be a strong thought leader and change-maker for the full breadth of heritage.We want heritage to be more widely recognised as a vital contributor to the economy, social cohesion, better places and individual wellbeing. We believe that understanding, valuing and sharing our heritage brings people together, inspires pride in communities and boosts investment in local economies.

Our [**Strategic Funding Framework 2019-2024**](https://www.heritagefund.org.uk/node/107896), which marks a new direction for us, sets out how we will deliver long-term and sustainable benefits in response to the needs of the heritage sector. Investing £1.2 billion within five years will impact on resilience, landscape and nature, wellbeing and innovation – and we are targeting a portion of our funding into thirteen deprived communities across the UK. We distribute National Lottery grants from £3,000 to £5 million and over, investing in projects that sustain and advocate the value of heritage.We plan to move beyond grant funding, exploring the use of social investment and loans, but will continue to support sustainability, and importantly, invest in initiatives which address environmental protection. We also want to work in partnership with other funders and maximise on how we leverage our Lottery income to even greater effect.

**Our support for heritage in response to COVID-19**

In the current environment, to address the immediate impact of COVID-19, The National Lottery Heritage Fund created the [Heritage Emergency Fund](https://www.heritagefund.org.uk/funding/heritage-emergency-fund)to provide immediate support for heritage organisations affected by the crisis - this went live on 15 April 2020.

We will be investing £50m where it is needed most, by providing short-term funding (up to £50,000) for organisations delivering heritage projects or running previously funded projects, and safeguarding heritage sites we have previously invested in to ensure they are not lost to the public. As a result of the focus on supporting organisations through the COVID-19 crisis, we have temporarily paused the operation of our core open funding programmes.

Further to this, we are accelerating the provision of our £1.25m [Digital Skills for Heritage initiative](https://www.heritagefund.org.uk/blogs/digital-skills-heritage-meeting-coronavirus-covid19-challenge) to help the sector through the crisis and beyond. This will include support for organisations to run activities and events, reach audiences, engage volunteers, share content and fundraise online. We have also invested £4m in two enterprise development programmes for heritage leaders across the UK, and business support programmes in all four countries – this support will come later as part of a wider recovery and resilience package. In addition, we are also continuing to support 2,500 projects currently in development and delivery where our investment commitments total over £1billion.

In tendering this brief we are mindful that the current crisis is the backdrop and one that is affecting us all. We’re keen to ensure that we develop our brand through a fit for future lens, so we can build on our leadership role; harnessing our expertise, partnerships and investments to ensure heritage survives and thrives well beyond COVID-19.

**1.3 Logo and name change in 2019**

As part of the launch of our investment strategy known as the Strategic Funding Framework in 2019, we underwent a name change and redesigned our logo, to strengthen our association with The National Lottery. The National Lottery Heritage Fund was previously known as the Heritage Lottery Fund (or commonly as ‘HLF’). The logo design is now aligned with The National Lottery Community Fund – and in effect, created off the back of their full rebrand.

However, this rebranding work was prepared at pace, no brand strategy or stakeholder engagement was undertaken, and the work was not completed – we do not have a cohesive brand articulation or a complete set of robust guidelines. The revised name, which aligns us to The National Lottery (notably with their iconic crossed fingers), and the new logo have not yet been fully embedded, with many external stakeholders still using the former name (and acronym). Internally, there’s also a need for us drive greater understanding of our brand and the value of brand to the business as a whole. This is something we’re addressing through active engagement activities as we speak.

**2. Project brief**

The National Lottery Heritage Fund is commissioning this project to evolve our brand and complete the guidelines to realise our full potential. The work is to build on what we already have, the brand equity from The National Lottery and previous Heritage Lottery Fund, and the recognisable link to The National Lottery and crossed fingers icon. The work needs to evolve our branding to create a more distinctive brand, that reflects who we are, what we do and why we do it.

We need the brand strategy and identity work to articulate clearly what makes us different; define our personality to be more engaging; complete the guidelines to be simpler and more flexible and cover the full range of digital media; create inspired ways for our grant recipients and partners to acknowledge us more effectively; and create a stronger co-branding hierarchy in which our identity is prioritised.

We have strongly aligned to The National Lottery, incorporating their identity into ours, as well as being cohesive with the brand of The National Lottery Community Fund. We are looking to strike a balance between these brands and our own brand, to regain distinctiveness. The National Heritage Memorial Fund which is our parent body, is not part of this work, but it would make sense at the very least for us to articulate the relationship between the two organisations within our refreshed guidelines.

Our current brand guidelines are about 60% complete, and moreover, do not fully meet all the requirements for different markets, media - notably digital - and approaches to co-branding need clarity, greater cohesion and an injection of creativity.

Further work is needed to engage key stakeholders and develop an identity and brand that builds stronger connections and inspires both our internal and external stakeholders – and importantly, increases brand visibility across our UK-wide funding and partnership footprint.

**2.1 Project objectives**

There are six core objectives and areas of work to address in delivering this brief:

1. **Engage our stakeholders** – consult with internal stakeholders across the four nations and key offices, engaging them in the development of our brand and garnering their buy-in along the way. We’ve already engaged our people through the development of our values and have activated a small series of masterclasses and workshops to increase awareness of brand and build understanding of this work. Externally we’re envisaging that the chosen agency will want to undertake some qualitative interviews with a number of stakeholders, both allies and critical friends.
2. **Fully articulate our brand strategy** - distil what The National Lottery Heritage Fund stands for and define our space in leading the heritage sector.
3. **Refresh our brand identity** - create the right identity platform to engage our key audiences and stakeholders, plus defined architecture and hierarchy which accounts for new partnership potential and co-branding. Throughout, accounting for our bilingual identity needs in Northern Ireland, Scotland and Wales.
4. **Address our name** - look at ways to make our name work better in how to express it in in short-hand verbal and written forms. What do we call ourselves with/without the National Lottery context e.g. when we work with other partners.
5. **Acknowledgement ideas framework** - develop an inspirational framework so our investments get acknowledged by partners and all those we support – from community projects to renowned heritage organisations. We need an injection of creativity here to show a variety of ways to integrate our branding into different contexts – a community project, a heritage building, outdoors, etc. We’re also keen to develop our approach to acknowledgement, so that grant recipients see it/us as a mark of quality (like a kitemark) rather than an exercise in sticking a logo on a wall.
6. **Complete the brand guidelines** - finish and create more flexible guidelines and the essential asset toolkit that both internal and external stakeholders will find easier to use. Again, this should include guidelines for the four nations – England, Northern Ireland, Scotland and Wales. We need to define how our brand works nationally and locally.

**2.2 Project scope and outputs**

**Engage our stakeholders**

As part of this brand development, we need to build our staff into brand advocates, and bring our brand and values to life through our culture.

In preparation of this brand brief, the Fund has already worked with an external brand consultant to hold three online brand masterclasses and two workshops with c.30-40 colleagues. The content has included the what, why and how of branding, and initial exploration of our personality using the Brand Archetype model. The outputs of these engagement sessions will be available to the chosen agency.

Internally, there are some key groups that need to be engaged, including Executive, our wider leadership group of Area/Country Director, Directors/Heads of Department, our Chair and Board of Trustees and our Marketing & Communications team. Internal stakeholder engagement activities need to account for a dispersed workforce in Scotland, Northern Ireland and Wales, plus three areas which cover England; the North; Midlands and East; London and South.

We anticipate the selected agency would want to build on this intelligence and undertake their own preferred engagement activities to get under the skin of the organisation, our people and how we are perceived by key external stakeholders too.

We will help facilitate and support stakeholder engagement activities, and anticipate this might comprise of c.3-4 online workshops, sufficient to engage a good cross section of our staff team and a small suite of qualitative interviews to capture external perceptions. We’ll look to the chosen agency to determine their preferred approaches to engaging key stakeholders.

**Integrating our new values and behaviours**

In the last year we’ve worked on refreshing our organisational values. These have been defined as: **trusted**, **inclusive**, **collaborative** and **ambitious** (see our values with descriptors in the appendix). We have been actively engaging our people in defining our refreshed values, and most recently, we created a compelling set of behaviours which will be embedded as part of our ongoing culture development work in the coming months.

The brand work needs to harness these newly defined values, bringing them to life as an integral expression of our personality and brand culture. It also needs to express our values and behaviours in a compelling way e.g. through visual/digital assets, which can be utilised in our internal communications and within our office environments. We’d also like the agency to finesse the narrative descriptors relating to our values, so they sit naturally within our refreshed brand.

**Stakeholder engagement outputs**

* Stakeholder engagement activities – plan how to engage staff across the four nations and offices as outlined above and gather insights from key external stakeholders too.
* Values and behaviours – create engaging communications/visual assets, so we can embed our new values and bring them to life internally.
* Finesse the draft narrative descriptors which articulate our values.

**Fully articulate a new brand strategy**

The National Lottery Heritage Fund brand does not have a brand strategy, so this is key to this work. We also need clarity on our positioning, and our personality needs to be more engaging and drive the development of our brand and identity. Our brand strategy can draw on **our vision**:

We will be recognised for our expertise and leadership across UK heritage. Through our ambitious funding programmes and partnerships, we will inspire, lead and resource sustainable, thriving UK heritage. Positive and lasting change will be created for people and their communities, now and in the future. Heritage will be recognised as a vital contributor to economic growth and social cohesion, to better places and communities, to health and wellbeing and to the protection of our environment.

**The brand strategy work is to include:**

* **Competitor audit** - review what competitor and partner brands stand for and their key messages. Key competitors (and partners) are defined as Historic England, The National Trust, Arts Council England, The National Lottery Community Fund.
* **Core idea and positioning** - define the space we occupy and want to own more so and how we clearly position ourselves within it.
* **Proposition** - clarify what we offer, why and how we describe it.
* **Vision** – craft a more succinct version of our vision as outlined above (this is the definition from our latest corporate strategy).
* **Brand architecture** - the relationship between The National Lottery Heritage Fund, The Heritage Fund and The National Lottery needs to be refined and defined in terms of how we communicate our brand in different markets and contexts. We also need to clearly determine the relationship we have with our founding organisation, The National Heritage Memorial Fund and articulate this in our brand strategy and guidelines.
* **Values** - these have been defined though the recent culture development work. noted above. We need to finesse how they are expressed in the context of the refreshed brand.
* **Personality** - define this to direct the identity, shape our tone of voice and enhance the creative and visual appeal of our brand potential.

**Brand strategy outputs**

* Competitor audit and insight feedback presentation.
* Brand strategy narrative presentation to include core idea and positioning, core proposition, brand architecture, personality and finessed values as above.

**Identity development**

This is to express the brand strategy, evolve our brand to be more engaging, and create more flexible and user-friendly assets.

**The identity development work is to include:**

* **Visual audit**, undertake a review of existing assets and collateral, building on what’s outlined in appendix 4 and 5: examples of collateral and co-branding.
* **Brand expression** - development of three concepts to bring the core idea, proposition and personality to life across different communications, including print, and importantly, digital applications (the priority).
* **Tone of voice** **and house writing style** - this needs to be developed to reflect the brand strategy and personality traits. The tone of voice is to include:
* Definition of the tone of voice.
* Branded messages and descriptors e.g. to explain the relationship to The National Lottery (with support from The National Lottery/awarding funds from The National Lottery) and a strong co-branding line for acknowledgement purposes (see examples in collateral pack).
* Messaging on how frontline staff would explain the offer to new, potential and current grantees.
* How to articulate when communicating bilingually, especially in verbal contexts e.g. phone.
* Create a ‘word pool’ that provides examples of words and phrases that exemplify the tone of voice and can be part of our brand tool kit.
* Refine the brand positioning, one-line positioning statement and narrative from the brand strategy work.
* **Brand hierarchy and architecture** – this needs to work cohesively and be clearly defined within our brand guidelines**.** In co-brandingwe needstronger acknowledgement and hierarchy in which our identity is prioritised.
* **The National Lottery Heritage Fund identity** - the ‘crossed fingers’ logo is not to be changed; however, the typography of the Heritage Fund part can be evolved.
* **The Heritage Fund** – further to the above, we also need a distinct version of our identity for use in instances when we are creating partnerships outside of our National Lottery remit e.g. The Heritage Fund is an obvious option, but we are open to exploring alternatives. We would need to create standout, recognition and cohesion with this and as an integral part of our brand. Three concept directions are to be explored, with one of these focused on how we might express our identity locally in each of the four devolved nations e.g. an iconic led route.
* **Fonts** - use of and accessible versions that complement each other in different formats and media.
* **Colour palette and colourways** - to be enhanced as our current palette is limited and lacks character. A refreshed palette with Pantone references and primary and secondary colours.
* **Photography** – update this to reflect the chosen concept and include how we can use the photographs we get from projects more easily, plus create guide for our own photography commissioning - see collateral examples in Appendix. Incorporate graphic devices that add value to our photographic style and personality too.
* **Iconography, illustration, infographic and imagery direction** – we are keen to utilise a non-photographic treatment/s as an integral part of brand toolkit. This is to be explored so graphic applications can be created easily and ideally in-house. We need a more dynamic and creative way to apply our brand in different markets and media. For example, a suite of icons could reflect the areas of our work (i.e. land and nature, community heritage, built heritage – and so on), but we’re keen for the agency to come up with some options.
* **Language** – a bilingual approach and offer needs to be considered for Northern Ireland, Scotland and Wales. There are a range of languages across the four nations that we need to account for, all of which all play to specific local communities i.e. for Scotland: Gaelic, Doric (North East), Lallans (South) and Spoken Scots and in Northern Ireland there’s Ulster Scots, plus of course Welsh. We also know for example, that the Gaelic version of our identity needs to be English-ed in the wording, rather than Gaelic-first.

**Identity application**

The identity is to be applied to at least four applications. Within this we’d like to see both photographic and non-photographic versions. We initially want to see three concept routes from which we’ll select an identity to be applied to the following:

1. Website re-skin home page/core web architecture, incorporating 2-3 key pages.
2. Values – how do we bring our values to life in a visual way for activation in our internal communications and office environments.
3. How will the identity work across social media e.g. Twitter, Facebook, LinkedIn, Instagram?
4. Corporate and engagement-led collateral (e.g. pop-up banner, research report, digitally).

**Identity and tone of voice outputs**

* Visual audit of existing collateral and identification of gaps.
* 3 visual and verbal concept ideas and chosen concept developed into a distinctive identity for The National Lottery Heritage Fund, to include visual and verbal identity elements as outlined above. Including fonts, colour pallet, photography style and iconography/image direction.
* Define our tone of voice, which is integral to the brand strategy work as outlined above. Also create ‘word pool’ of exemplars, branded messages, descriptors and how to communicate bilingually, especially on phone.
* The Heritage Fund, this is to be developed into an identity that can appear separately for non-National Lottery funded partnerships, but integral to a cohesive brand architecture and hierarchy. An icon approach that expresses the four nations is to be explored – how can we communicate our brand in local contexts?
* Identity to account for bilingual requirements for Wales, Scotland and Northern Ireland.
* Identity to be applied to up to four applications as above.

**Naming**

The National Lottery Heritage Fund name is to be retained, there is no appetite to change it. We want to explore a shorthand version of our name in spoken and written form, with particular attention paid to the nuances of bilingual use – for example, the bilingual name is a bit of a ‘mouthful’ to say, particularly in Welsh. We will also be looking to ensure this is clearly articulated in our brand guidelines.

We also want to look at our name and how we use it in different markets, such as in cases where National Lottery funding is not applicable. For example, we want to explore how to use the name The Heritage Fund when joining forces with other partners e.g. with Devolved Governments, with heritage organisations or networks and trusts and foundations – we are currently looking to partner with the devolved Welsh Government and we have plans to join forces with relevant charitable trusts.

**Naming outputs**

* Recommendations on what to use as a shortened form of our name for both written and verbal communications, with bilingual requirements for Wales, Scotland and NI e.g. on the phone, in speeches, in reports, etc.
* Exploration and clarity about how we define our name in the context of working with The National Lottery and other partners - and how, for example, we use ‘The Heritage Fund’ or an alternative abbreviated name which can sit comfortably within our brand architecture. Accounting for co-branding with types of grant recipients also needs clarity i.e. how our investments our credited and acknowledged in different contexts and environments.

**Co-branding and acknowledgement**

Before the COVID-19 crisis, The National Lottery Heritage Fund distributed grants from £3,000 to £5million and over, supporting and investing in projects and organisations that protect, sustain and transform the UK’s rich heritage. Many of these projects are still under development. However, it is often the case that our investments are not credited or acknowledged as effectively as they should be. We want our funding to be celebrated, to be more visible and higher in profile and support the development of new partnerships and collaborations. But more importantly, we want National Lottery players to know where their money has been used and to understand how it’s supporting local heritage within their community.

In the Appendix, Collateral Examples of The National Lottery Heritage Fund, a recent example is shown funding acknowledgement for an exhibition at a national cultural institution that has historically received major funding from us of c. £30 million. With a more recent investment of over £9million it was hard to notice our vital role in supporting their latest capital development. A more inspiring example is the banner across the track at Silverstone Experience.

The brief here is to showcase what creative co-branding could look like and to inspire all of our grantees to actively acknowledgment and increase visibility of our investment/s. An inspiration framework as an addendum to the guidelines should incorporate inspiring ways for grant recipients - large and small, community-led and major institutions - to formally acknowledge our contribution, which in turn will raise vital brand awareness and recognition among key audiences of what we do and why we exist. With stronger guidelines in place, we’ll be adopting a more robust and proactive approach to ensuring that our grantees are actively acknowledging us in the right way/s – we’ll do this through direct client engagement, as well as via grant monitoring and reporting mechanisms.

**Acknowledgement framework outputs**

* Inspiring framework that works as a separate addendum to the core brand guidelines, that we can encourage grant recipients and partners to apply our brand effectively in their acknowledgement of our support (steers on how to be more creative – hoardings on a building, in-built acknowledgement in the fabric of building as part of the architectural plans, how land and nature projects could integrate our brand and acknowledgement in a sustainable way, etc). Different levels of requirement according to the materiality of our funding/nature of the project.
* Determine a hierarchy that works with partnerships and co-branding to include single partners, joint partners and multiple partners.

**Brand guidelines**

The guidelines are already approximately 60% complete. There are gaps and they are not as cohesive as they could be in how we should apply our brand and we noticeably lack a digital application. The current guidelines need to be refreshed with a new injection of personality and creativity – our current brand is very one dimensional, so would benefit from new visual applications, including graphic devices, illustrative and photographic styles.

**Brand guideline outputs**

The full brand guidelines will need to be fully scoped with the chosen agency after the visual identity has been decided below is an indicative list:

* **Visual identity elements**, including design principles, to include:
* Colour palette and colourways.
* Available fonts.
* Photographic style for commissions and treatments of images we received from grant recipients and from our own commissioning.
* Use of illustration styles, graphic devices i.e. non photographic treatment/s.
* Application on infographics and icons (also in relation to priority areas of our work e.g. land and nature, culture and memories, community heritage).
* Brand hierarchy and architecture.
* The Heritage Fund identity or alternative - how this works as a separate and linked identity – and bilingually in Wales, Scotland and NI.
* **Verbal identity elements**, to include:
* Tone of voice.
* Positioning line and narrative.
* Branded messages.
* Acknowledgement and relationship line.
* ‘Word pool’ for inspiration.
* Bilingual requirements.
* **Layouts and exemplars** – to show how best the brand should be applied in different media, including social. i.e. digital assets including social media graphics and devices (such as profile icons); stationery; refreshed corporate slide deck (front page and one or two internal pages); print assets (such as research reports and annual report); merchandise (pop up banners, postcards, badges, business cards).
* **Toolkit of assets** – visual identity, other key assets in different formats e.g. JPEGS, AI, EPS, PNG files.
* **Website** - we need a new branded look and feel to re-skin our existing website, using our CMS and internal team’s expertise.
* **Accessibility and bilingual requirements** – inclusion is at the heart of what we do. We are committed to making our website and its content accessible, with regular Shaw Trust accreditation testing. All other applications and printed materials must also meet accessibility criteria including screen reader accessibility, RNIB guidelines, use of plain English and other. This needs to be considered throughout the brand development and creative work. The bilingual requirements of the Northern Ireland, Scotland and Wales (legal bilingual requirements) also need to be integrated.

# 3. Outline process

To achieve the brand strategy and creative development of our identity, brand application and guidelines, we envisage the following stages of work ­– though we would like the agency to make their own recommendations.

**Phase 1: Research and consultation**

* Revisit of the brief to ensure we have a shared understanding of it.
* Plan how best to engage our staff in the creative process, across the four nations and offices as outlined in the brief.
* Conduct approximately 12-14 internal interviews, which represent a cross section of the organisation, including representatives from our Leadership team, MarComms, Engagement, Investment, Stakeholder/Policy leads. Interviews to account for our dispersed workforce located in 6 areas, Northern Ireland, Scotland, Wales, and England North, Midlands and East, London and South.
* Conduct c. 6-8 qualitative interviews with external stakeholders, including allies and critical friends.
* Desk research on e.g. competitors/other funders/heritage sector organisations and their positioning and key messages i.e. Arts Council England, The National Lottery Community Fund, Historic England, The National Trust, others.
* Benchmark other brands to learn from.
* Evaluate name and co-branding issues.
* Visual audit of current identity and how it is applied in different markets and media.

**Phase 2: Develop brand strategy**

* Using co-creation and collaborative processes, workshop/s and working closely with the core brand project team, the wider Marketing & Communications team and organisation, create options for the brand positioning.
* Develop into a full brand articulation.
* Recommend naming suggestions.
* Present recommendations to the core brand project team, take on board feedback.
* Present final recommendations to the Leadership group together with core brand project team (leadership group includes CEO, Chair, Executive).

**Phase 3: Develop identity**

* Agree creative brief.
* Develop 3 concept routes for The National Lottery Heritage Fund identity.
* Explore and develop three routes for linked identity for The Heritage Fund, one of these to be an icon approach.
* Present to the core brand project team and select 1-2 concepts for further development.
* Present developed routes to core brand project team and core Leadership team and take on board feedback for sign off by Chair of Board, CEO, Executive Director, Business Innovation & Insight.

**Phase 4: Guidelines and acknowledgement**

* Develop guidelines and core templates including 2-3 website pages.
* Create up to 3 additional exemplar assets, as outlined in the brief.
* Develop inspirational framework for acknowledgement that could form a separate addendum to the guidelines, to inspire our grantees and partners to be more creative in their acknowledgement of our support.

**4. Key audiences and stakeholders**

**Our key audiences are:**

**External**

**Government –** Westminster (Ministers, MPs, key departments i.e. Department for Digital, Culture, Media & Sport (DCMS)), DEFRA, Devolved Parliaments in Wales, NI, Scotland, policy makers in heritage and culture.As an organisation we fund projects and organisations across all the four nations of the UK and work with both central and local government. We want the latter to match our investments more so and work in partnership with us.

**Heritage sector** - we work with stakeholders across the heritage sector and define it broadly. We are very open and democratic and engage a wide range of projects and organisations. We work with cross sector organisations and alliances such as Heritage Alliance, and partners such as The National Trust, Historic England, The National Lottery Community Fund, Arts Council England and many others in conservation, land and nature, arts, culture, etc.

**Customers –** defined as potential applicants, applicants, grant recipients of small/medium/large organisations and local community groups.

**Public –** primarily National Lottery players or 61% of the UK adult population with a diverse understanding and interest in good causes of which we are one. We champion the contribution of Lottery players by making sure they know where Lottery money is spent – and the positive effect it has on people, communities and organisations that enjoy and protect the UK’s rich heritage.

**Internal**

**Internal stakeholders** – nearly 300 employees across all four nations of the UK, with offices in Northern Ireland, Scotland, Wales and England, including a central base in London. Our leaderships teams, including the Executive team (CEO, plus three Executive Directors), a Board of Trustees and six Committees located in each area/nation. Our wider leadership group includes Area/Country Directors and senior leads across three core areas of the business: Business Innovation & Insight (Marketing & Communications, Strategy & Innovation, Policy, Data & Insight), Business Delivery (Investment, Engagement and Area/Country teams, Central Business Delivery) and Business Services (Operations, including Finance, IT & Estates, HR, Lega & Governance).

**5. Contract management**

**We expect the project to begin on 1 June 2020 and be completed by 5 October 2020**.

The anticipated budget is not to exceed £72K to include VAT, essential expenses are in addition and need to be clearly defined and agreed upfront~~.~~

The payment schedule will be staged against the four phases (as outlined above) and directly linked to final delivery being satisfactorily completed, signed off by The National Lottery Heritage Fund and invoiced correctly.

The project will be led by Jill Cochrane, Director of Marketing & Communications, and project managed by Susannah Evans, Publications and Design Manager. Isabel Hunt, Executive Director, Business Innovation & Insight is the project sponsor.

**The contract is subject to NLHF Service Contract attached (a blank contract has been uploaded to Contract Finder).**

**6. Award Criteria**

A proposal for undertaking the work should include:

**Detailed methodology, staff and fees**

The brief outlines a suggested process, taking this on board please state clearly your approach and methodology, and what you would require from us as an organisation to ensure a successful outcome. Please articulate in succinct terms, including project stages/milestones and timeline.

Also please include details of the staff team who will be allocated to the project, the days allocated to each team member together with your company’s (and staff members’) experience in carrying out similar projects. Core team members to deliver the project should be identified and their profile provided. The same core team should be available to attend the pitch presentation stage which will be held virtually.

Please break down the fees for this process to the budget in Table A – Schedule of Charges.

* + - 30% allocation

**Case studies**

Please include two of your agency’s case studies, which demonstrate the full brand strategy articulation, the creative development of the identity, through to creative applications in digital, marketing and communications. Please demonstrate this in sector/s relevant to The National Lottery Heritage Fund and outline what the reported impact was for the clients.

* + - 15% allocation

**Risk**

We appreciate we are going ahead with this project in very uncertain times with the coronavirus pandemic. Please can you outline the challenges and the key risks between now and the autumn of 2020 in terms of delivering this brief and how you would mitigate against them, including plans for a contingency team. Please can you also provide your last two year’s business accounts.

* + - 15% allocation

**Heritage**

What does investing in the UK’s heritage mean to you? How do you see The National Lottery Heritage Fund’s role in this and what are the essential things we should be communicating in our brand and messaging?

* + - 20% allocation

**Acknowledgement**

The National Lottery Heritage Fund’s investments often aren’t fully recognised by its grant recipients whether that’s by a small community led project or by a large heritage organisation. Without doing any creative work, what ideas do you have on how we could effectively increase visibility of our investments in the UK’s rich heritage and ensure we remain relevant now and in the future?

* + - 20% allocation

Your Quality element will be scored out of 100%.

**70% of the total marks will be awarded to Quality, 30% to price.**

Each question will be scored using the methodology in the table below.

Tender responses submitted will be assessed by the Fund against the following Quality Questions: -

1. To what extent does the agency’s response demonstrate an understanding of the brief and its specific requirements?
2. To what extent is the approach and method appropriate to the project?
3. What is the extent of the agency’s experience of similar brand-related projects?
4. How well has the tenderer structured their team in order to successfully manage the contract and deliver the required work to the budget and timetable required?
5. How well has the agency addressed the project risks and mitigations.

**Quality Questions scoring methodology**

| Score | Word descriptor | Description |
| --- | --- | --- |
| 0 | Poor | No response or partial response and poor evidence provided in support of it. Does not give the Fund confidence in the ability of the Bidder to deliver the Contract. |
| 1 | Weak | Response is supported by a weak standard of evidence in several areas giving rise to concern about the ability of the Bidder to deliver the Contract. |
| 2 | Satisfactory | Response is supported by a satisfactory standard of evidence in most areas but a few areas lacking detail/evidence giving rise to some concerns about the ability of the Bidder to deliver the Contract. |
| 3 | Good | Response is comprehensive and supported by good standard of evidence. Gives the Fund confidence in the ability of the Bidder to deliver the contract. Meets the Fund’s requirements. |
| 4 | Very good | Response is comprehensive and supported by a high standard of evidence. Gives the Fund a high level of confidence in the ability of the Bidder to deliver the contract. May exceed the Fund’s requirements in some respects. |
| 5 | Excellent | Response is very comprehensive and supported by a very high standard of evidence. Gives the Fund a very high level of confidence the ability of the Bidder to deliver the contract. May exceed the Fund’s requirements in most respects. |

**30% of total marks will be awarded for Price.**

The evaluation of price will be carried out on the Schedule of charges you provide in response to **Table A**

## Price Criterion at 30%

* 30 marks will be awarded to the lowest priced bid and the remaining bidders will be allocated scores based on their deviation from this figure. Your fixed and total costs figure in your schedule of charges table will be used to score this question.
* For example, if the lowest price is £100 and the second lowest price is £108 then the lowest priced bidder gets 30% (full marks) for price and the second placed bidder gets 27.6% and so on. (8/100 x 30 = 2.4 marks; 30 - .4 = 27.6 marks)
* The scores for quality and price will be added together to obtain the overall score for each Bidder.

## Table A - Schedule of Charges

Please show in your tender submission, the number of staff and the amount of time that will be scheduled to work on the contract with the daily charging rate.

Please complete the table below providing a detailed breakdown of costs against each capitalised description, detailing a total and full ‘Firm Fixed Cost’ for each element of the service provision for the total contract period. Bidders may extend the tables to detail additional elements/costs if required.

VAT is chargeable on the services to be provided and this will be taken into account in the overall cost of this contract.

As part of our wider approach to corporate social responsibility The National Lottery Heritage Fund (and The National Heritage Memorial Fund) prefers our business partners to have similar values to our own. We pay all of our staff the living wage (in London and the rest of the UK) and we would like our suppliers and contractors to do likewise. Please highlight in you proposal/tender/bid whether you do pay your staff the living wage.

Bidders shall complete the schedule below, estimating the number of days, travel and subsistence costs associated with their tender submission.

**TABLE A: (firm and fixed costs)**

| **Cost** | **Post 1 @cost per day**  **(No of days)**  *e.g. Project Manager/ Director*  *@ £x* | **Post 2 @cost per day**  **(No of days)**  *e.g. Senior Consultant/ manager*  */researcher*  *@£y* | **Post 3 @cost per day**  **(No of days)**  *Junior*  *Consultant/equivalent*  *e.g. £z* | **Total days** | **Total fees** |
| --- | --- | --- | --- | --- | --- |
| Inception meeting to agree plans and finalise requirements with the Fund | *Example 0.5* | *1* | *1.5* | *3* | *£4* |
| *[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: The Fund reserves the right to clarify quality and prices and to reject tenders that demonstrate an abnormally low-quality response. The Fund also reserves the right to amend the timetable of work where required.**

You should not submit additional assumptions with your pricing submission. If you submit assumptions, you will be asked to withdraw them. Failure to withdraw them will lead to your exclusion from further participation in this competition.

# 7. Procurement Process

* + The Fund reserves the right to reject abnormally low scoring tenders. The Fund reserves the right not to appoint and to achieve the outcomes of the research/evaluation through other methods.
  + The procurement timetable will be as required by the Contract:
  + We reserve the right to carry out clarifications if necessary; these may be carried out via email or by inviting bidders to attend a clarification meeting.  In order to ensure that both the Fund’s and Bidder’s resources are used appropriately, we will only invite up to three (the ultimate number will depend on the closeness of the scores) highest scoring bidders to attend a clarification meeting.  Scores will be moderated based on any clarifications provided during this meeting.  You are responsible for all your expenses when attending such meetings.
  + **Your tender proposals must be sent electronically submitted directly to Jill Cochrane before the tender return deadline of 6 May 2020 at noon.**

**PLEASE NOTE: All responses and questions to this brief must be shared directly on Contract Finder as this is integral to our procurement protocols.**

**No individual enquiries.**

**Contacts (for reference only)**

**Brand consultant contact:**

Fiona Myles, Kin

Email: [fionamyles@mylesconsulting.co.uk](mailto:fionamyles@mylesconsulting.co.uk)

**Primary business contact:**

Jill Cochrane (Project Lead)

Director of Marketing & Communications

The National Lottery Heritage Fund

Email: [Jill.cochrane@heritagefund.org.uk](mailto:Jill.cochrane@heritagefund.org.uk)

**Secondary business contact:**

Susannah Evans (Project Manager)

Publications and Design Manager

The National Lottery Heritage Fund