

Essential Networks project

Invitation to tender for Marketing and Communications Consultant

1 Summary

Heritage Trust Network seeks to appoint a consultant to help us review our marketing and communications. The consultant will work with the Chief Executive, Programme Manager, Membership Officer, other staff and trustees and representatives of our membership to review the effectiveness of current communications, our marketing objectives, the systems we use, and the design, frequency and tone of our communications. The result of the consultancy is expected to be a communications strategy and guidance for the Network to use over the coming years.

2 Background

Heritage Trust Network is the membership body for independent community organisations, charities and social enterprises that are saving, restoring and managing historic buildings, parks, gardens, canals and railways. Our membership includes both organisations specifically set up to save heritage sites and community organisations that deliver other types of services and have chosen to operate from historic buildings and spaces. We also welcome individuals, businesses and local authorities that support local heritage action. Together we organise conferences, site visits, meetings and online resources where we can network and learn from each other and meet experts and funders.

Essential Networks is a major development and resilience project for Heritage Trust Network, our members and UK heritage. It will resource the Network over the next five years as a major sector infrastructure organisation to provide significantly enhanced support to small and medium sized community-led heritage organisations. During 2023 we will be implementing the development phase of Essential Networks, before applying for the delivery phase in May 2024, to begin later that year. During this development phase we will be working with a Network Development Group – a ‘focus group’ of members to inform the project’s work and give feedback on proposed activities and changes.

During the past three years the Network has undergone a digital transformation largely supported by our Unlocking the Power of Communities, National Lottery Heritage Fund project. This has included development of a Customer Relationship Management (CRM) system using Salesforce. The CRM currently holds all our data on external contacts, including membership records, and enables us to send list emails to targeted groups of members and non-members. This complements our existing use of Mail Chimp to send fortnightly e-Newsletters to members and other subscribers. The Network makes good use of social media. Our existing WordPress based website (which is now approximately six years old) is not sufficiently flexible to allow for new activities and projects to be incorporated and it is planned to replace it towards the end of the development phase project. Supporting us to develop a brief for a designer/developer for the new website will be part of this consultancy.

3 Objective

The objective of the assignment is to review our approach to marketing and our current communications to assess their effectiveness in achieving our objectives and to develop proposals for immediate improvements, communications guidance and a marketing strategy which includes

costings for any longer term changes that need to be included in the Essential Networks delivery phase proposal.

We are seeking to ensure that:

- the Network has clear marketing objectives,
- marketing objectives contribute to our overall strategic objectives of helping our members succeed, growing the Network, raising awareness of the Network and its members and building partnerships,
- these objectives are translated into a clear marketing plan and communications guidance
- staff, trustees and member-volunteers have contributed to these plans and guidance and are committed to them,
- plans and guidance are deliverable by a lean staff team.

4 Scope of services

The work required is, in consultation with staff, trustees, volunteers and members to:

- Review Heritage Trust Network's marketing and communications, including objectives, practices, management, technologies used, design, branding, tone and targeting. Although the Network's marketing and communications are mainly digital, the review should include our use of printed media, merchandise and branding at events.
- Develop a marketing plan for the Network
- Review (and amend if necessary) the current branding guidelines.
- Develop communications guidance for staff, volunteers and sub-contractors
- Identify any longer term plans that have cost implications to be included in the delivery phase application for Essential Networks

Specific issues to be addressed include:

- As the Network grows, maintaining the friendly, collaborative culture of a peer-networking organisation while needing to communicate with hundreds of members.
- Improving awareness of the Network among key stakeholders including Government departments and agencies, funders, local authorities and other third sector organisations at a national and local level.
- Management and co-ordination of communications within a staff team that works with a high level of autonomy across different territories and projects.
- The commissioning of a new website for the Network.

Note the above is not an inclusive list and we expect further specific issues to be identified as part of the initial scoping phase of the consultancy.

The appointed consultant will have to work with the Digital Development Consultant. There is some overlap, and an early meeting will be needed to clarify how the scope of the two briefs will be differentiated. We are open to the two assignments being delivered by the same person/firm (see 8 below).

5 What are we looking for?

We are looking for a consultant who has:

- Expertise in marketing and communications, particularly in the not-for-profit sector.
- A track-record of supporting organisations to improve their marketing and communications
- Experience of working with membership organisations.
- An understanding of the heritage sector generally, and of the types of organisations that make up the Network’s membership in particular.
- Understanding of, and commitment to, inclusion and accessibility in communications
- A commitment to a co-design practice, working collaboratively with our team (who are located throughout the UK) and our members, and enabling our staff, trustees and other volunteers to learn from the process.

This commission could be delivered by an organisation or a freelance individual. If the former, we will need to have a lead consultant identified who will be our primary point of contact and responsible for the delivery of the work.

6 Timetable

The core of the work should be completed between February and July 2023, but the consultant should be available until the end of September to support staff with any queries around implementation and amend plans and guidance if required.

Indicative timetable (to be discussed on appointment):

February 2023	Initial meetings with Chief Executive and Programme manager
March – May	Undertake review
March	Consult with Network Development Group and staff team. We have identified 13 th – 16 th March as a time when we may have staff ‘working together days’ and an in-person workshop could be scheduled.
By 12 th April	Brief progress report and initial proposals (in order to report to Board Meeting on 20 th April). Good – can we have this interim stage for the others too?
June	Draft marketing plan and communication guidance for discussion
July	Final marketing plan and communication guidance produced.
July – September	Support staff with any queries around implementation (amend plans and guidance if required).

7 Budget

The maximum budget for this work is £12,000 plus VAT including all fees, expenses and materials. A payment schedule will be agreed with the appointed consultant.

8 How to apply

Bidders are required to

1. Complete [this online form](#) to provide business information (if you are submitting a response to more than one invitation to tender you need only do this once). We advise you to do this as

early as possible so that we are aware that you are bidding and can share with you any clarifications that we issue.

2. Submit a written response to the brief of no more than 6 pages providing information on:
 - People: Details of the individuals that will undertake this work highlighting how they meet the requirements set out above at section 5. Specify who will be the lead consultant.
 - Experience: Three relevant examples of where you have undertaken similar work in the past
 - Approach: Outline your response to the brief above and how you will approach the different phases of the work.
 - Budget breakdown: A breakdown of time allocated for each element of your programme and a total cost including expenses.
 - References: Contact details from two projects you have been involved with that we can contact for a reference

Note that we will not accept any other materials beyond 6 pages. Please do not attach any other appendices or supporting documents. Additional documents will not be considered. Your submission should be a pdf. The minimum font size for your submission should be 11pt. We will not be liable for any costs you incur in submitting your tender.

If you are submitting proposals for more than one of the consultancy/associate commissions that we are currently advertising you may submit, in addition to the separate tenders for each opportunity, a single-page document of no more than 300 words explaining the benefits of combining those commissions and the synergies to be achieved.

Tenders should be emailed to David Tittle david.tittle@heritagetrustnetwork.org.uk by midday on 6th February. We reserve the right not to consider any submissions where the tender document or business information form is received after the deadline.

Any clarifications should be emailed to David Tittle david.tittle@heritagetrustnetwork.org.uk and they will be answered in writing. Clarifications may be shared with all known bidders. We cannot guarantee to answer clarification queries after midday on 3rd February.

We reserve the right not to appoint.

9 Procurement timescale

15 th December 2022	Early notification of opportunity (expressions of interest requested)
13 th January 2023	Invitation to tender advertised
Midday 6 th February	Deadline for submissions
w/c 20 th February	Interviews
24 th February	Appointment

10 Evaluation

Responses will be evaluated on the basis of the initial submission. Higher scoring bidders' references will be taken up and they may be invited to interview. Scores may then be adjusted. Responses will be scored as follows:

Score	Classification	Characteristics
4	Excellent	Exemplary response. Comprehensive and relevant information is provided and the response provides the evaluation panel with a very high level of confidence that the bidder will be able to meet the requirements of the project if appointed, with no reservations or concerns arising from the response.
3	Good	Comprehensive and relevant information is provided and the response provides the evaluation panel with a high level of confidence that the bidder will be able to meet the requirements of the project if appointed with no more than one limited reservation or concern arising from the response.
2	Satisfactory	A broad response with an adequate level of information provided that is relevant and the response provides the evaluation panel with at least a good level of confidence that the bidder will be able to meet the requirements of the project if appointed with no more than minor reservations or concerns arising from the response.
1	Poor	The response is limited and lacking in relation to a large proportion of material elements and leaves the evaluation panel with significant reservations or concerns around the ability of the bidder to meet the requirements of the project if appointed.
0	Unacceptable	No response or extremely limited response that does not suggest that the bidder has the ability to meet the requirements of the project if appointed.

In assessing your experience and approach we will take account of your track-record and proposed approach regarding equality, diversity and inclusion, sustainability and social impact.

Sections included in tenders as set out above, have been allocated a weighting which will be applied to the scores as follows:

Section	Weighting (%)
People	20%
Experience	30%
Approach	30%
Cost	20%

There is a maximum budget for this project of £12,000 including all expenses (excluding VAT).

The Network does not necessarily want, and is not required, to appoint the cheapest bid but needs to include price within the evaluation to ensure a robust process and evidence of pursuing value for

money through procurement. The Network will not cover costs associated with preparation of tender materials.

The cost elements of the bids will be scored with the lowest bid scoring 4 and the scores of other bids will be calculated on the basis of:

lowest bid/other bid x 4

Therefore if Firm A's bid was the lowest tender at £10,000 and Firm B bid £11,500

Firm A would score 4 and Firm B would score 3.48.