



**Invitation to Tender for
Brand refresh and development**

Deadline for Tender Submissions:

5pm Friday 12 July

Project Brief

1. Introduction

The Centre for Ageing Better (Ageing Better) is a charity, funded by an endowment from The National Lottery Community Fund, working to create a society where everyone enjoys a good later life.

We bring about lasting changes in society, particularly for those approaching later life and at risk of missing out. As part of the What Works Network of organisations, everything we do is rooted in evidence. Our strong base in research underpins action to transform later lives.

We work to influence nationally and deliver locally – we do this through a range of partnerships with local places and national organisations. Our primary audiences are therefore policymakers and practitioners working across our four priority areas (Fulfilling work; Safe and accessible homes; Healthy ageing; Connected communities).

Our principles are:

- Start with the person
- Focused on impact
- Grounded in evidence
- Bold and innovative
- Open and collaborative

2. Scope of Project

Ageing Better launched in 2015. We completed a brand refresh (which included a new logo, colour palette, type face and wider brand guidelines) in January 2017. As part of this project, we also worked with a creative agency to establish a look and feel for our reports.

Now, with a new strategy, [Transforming later lives](#), we've identified a bolder voice to our approach in communications and have more clarity in who we are, how we work and who we work with. We believe this is the right opportunity to further develop our brand.

This brand refresh should not serve to undo our previous brand work or to take us in a completely different direction but is about us building upon our already established brand. We want to elevate it and to sharpen our voice and visual identity, bringing our brand more closely to our strategy – this refresh should help continue to establish us as experts and as an authoritative voice, and help shape how we would like to be seen and talked about.

This project should be driven by user testing, including internal workshops with Ageing Better staff as well as external stakeholders and target audiences. Where appropriate, Ageing Better can provide previous stakeholder surveys, but the expectation is that discovery workshops and focus groups with users are completed.

We are also currently inviting bidders for our ITT on website development and are looking for a new way of working on web development. The brand refresh should feed into the work on the website, which will focus on re-design of certain aspects and further work on the look and feel of our site. Timelines on the brand project and its duration is therefore conditional on the website development project, but we don't anticipate the total project exceeding two months from the commencement of the contract.

We are welcoming bidders to bid on both Invitation to Tenders. If two separate bidders win each ITT, we would expect them to work closely with each other.

All materials produced need to be easy and fit for digital use as well as print and be coherent with the design elements of the current Ageing Better website.

Since we are funded by The National Lottery Community Fund, all our external communications outputs such as reports, leaflets and business cards require co-branding.

The bidder must also ensure that good practice in terms of accessibility must be met and considered in all elements of design.

Maximum budget for this project is £25,000 including VAT and expenses.

3. Outcomes and Objectives

Below are potential areas of development and outcomes, though the successful bidder will be expected to work closely with Ageing Better and our stakeholders – for example through workshops – to fully determine the exact output.

New brand guidelines building on our existing guidelines, which includes the following:

Iconography, graphic elements and graphs

While we feel that our style of photography doesn't necessarily need further work, there is a need for development of our illustration and graphs.

We use icons to represent our areas of work, graphs in our reports and have worked with agencies to produce animations, but we see this is an area of improvement and would like to produce more data visualisation work, especially on our website using API integration e.g. [HighCharts](#)

Reports

As part of the refresh in 2017, we classified our reports in three types: Evidence, Influence and action, and Insight. Each report type serves a different function and is identifiable by a different cover and colour scheme.

However, the limitations of the look and feel of these reports means that as part of this project, we want to re-examine the branding of our reports and related products; this should include styles, colours and graphic elements.

Editorial style and tone of voice

We would like our tone of voice to be bolder, with the production of simple guidelines, or principles (a more digestible version of a House style), for how we should talk about our different areas of work to different audiences and for different channels, such as blogs or reports.

We have an existing House style that gives guidance on preferred spelling and grammar, and there is an understanding of who we are, but this needs to be refined and greater consistency.

Email marketing

We send out two fortnightly e-newsletters; a general Ageing Better news and a Research and Policy e-alert, in addition to ad hoc one-off newsletters – content in these includes information about our reports and events for example.

For use in MailChimp, we require templates that are not only easy to use when drafting the e-newsletters but are visually appealing, offer flexibility in terms of content in them and are consistent with the other deliverables of this brand refresh.

Over the next year we are looking to produce fresher and more engaging e-newsletters, to increase our reach with new and established audiences.

Social media graphics and infographics

A suite of templates that can be used on social media to pull out key information from reports (both stats and pull quotes), as well as Twitter cards that can be used to promote events, ITTs, jobs etc.

Video brand guidelines

We would also like to produce video brand guidelines, which includes guidance on logo usage, intros and outros, lower thirds and thumbnails.

4. Key Requirements

Due to in-house capabilities and the expectation that the new guidelines are intuitive, we do not feel there is a need for ongoing support or specialist training from the successful bidder.

We have in-house capacity and availability of Adobe Creative Cloud, so the templates should be supplied as Adobe CC files (or as Microsoft Word, where appropriate) so that they can be used by Ageing Better staff.

Bidders are requested to give a detailed articulation of methods and costs, including consulting or co-creating with staff and audience groups, production and amending design ideas with Ageing Better staff, creation and modification of an enhanced style guide.

Please quote, in accordance with the scope, for:

- Consulting and co-creation
- Design
- Creation of templates and other products

In response to this specification we ask contractors to provide:

- A brief explanation of proposed approach and method for delivery of the project (including working with stakeholders)
- Details of your experience of working with similar organisations and on similar tasks including at least two Testimonials and examples of similar deliverables
- A breakdown of costs

Insurances

The Supplier shall take out and maintain in full force and effect with a reputable insurance company the following minimum insurances for the duration of the Contract:

- Public Liability insurance – £10 million
- Employer's Liability insurance – £5 million
- Professional Indemnity insurance – £2 million

5. Evaluation Methodology

Bids will be evaluated on a quality/cost ratio of 70%/30%. The individual weightings for the 70% quality element are stated against each question in the Bid Proposal document.

The Bidder that submits the lowest Bid Total will receive the maximum score of 30%. All other Bidders' Bid Totals will be scored based on the following formula:

$$\frac{\text{Lowest Bid Total}}{\text{Bidder's Bid Total}} \times 30$$

6. Timescales

The indicative timetable for the procurement is as follows:

Stage	Date
Issue ITT document	Wednesday 5 June
Deadline for clarifications	Friday 14 June
Issue response to clarifications	Tuesday 18 June
ITT return deadline	Friday 12 July
Bidder interview	Wednesday 17 & Monday 22 July
Notification of result	Tuesday 23 July
Contract award	Wednesday 31 July

Ageing Better reserves the right to amend these dates.

Supplier Questionnaire

1	Bidder name	Insert details
2	Registered address	Insert details
3	Name of person completing the Invitation to Tender	Insert details
4	Telephone number	Insert details
5	E-mail address	Insert details
6	Company status (e.g. Ltd, Plc, sole trader, Charity, Community Benefit Society, etc.)	Insert details
7	VAT registration number	Insert details
8	Company registration number and/or charity number	Insert details
9	Date of incorporation	Insert details
10	Please attach a latest copy of the Bidder's latest audited accounts	
	Accounts enclosed – Yes/No	

11	<p>Please provide evidence of the following levels of insurance cover:</p> <ul style="list-style-type: none"> • Employer’s liability • Public liability • Professional indemnity
	Insurance evidence enclosed – Yes/No
12	<p>Please provide details of any relevant industry accreditations held by the Bidder.</p>
	Insert accreditation details
13	<p>Please provide the organisation name, contact details and a brief description of 2 contracts of a similar nature which demonstrate the Bidder’s experience in relation to Ageing Better’s requirements. Any contract award will be subject to a satisfactory reference being provided by one or both of the named companies.</p>
	Insert details

Bid Proposal

Quality (weighting 70%)

Reflecting the requirements set out in the Project Brief, please submit your responses to the following:

1. Experience (weighting 10%)

Please highlight your experience of successfully delivering projects of a similar nature, detailing the quality, experience and technical skills of the delivery team who will deliver against this contract (maximum 1,000 words).

2. Stakeholder Engagement (weighting 20%)

Please provide details of how you will engage with key stakeholders associated with the project to ensure a successful contract delivery (maximum 1,000 words).

3. Delivery of Outcomes and Objectives (weighting 20%)

Please demonstrate how you will deliver against the outcomes and objectives as set out in the Project Brief (maximum 1,000 words).

4. Communications and Performance (weighting 10%)

Please demonstrate how you will ensure timely and effective communications with key stakeholders, and how you will manage and monitor performance, throughout the term of the contract (maximum 500 words).

5. Risk Management Analysis (weighting 10%)

Please identify the risks to achieving the stated outcomes and objectives and your proposals for mitigating them (maximum 500 words).

Price (weighting 30%)

Please provide your proposed cost for delivery of the contract. This shall be broken down to show the cost of each individual milestone, the proposed number of days allocated to the contract, the day rates of each allocated staff member, and any applicable expenses. All costs are to be stated exclusive of VAT, and confirmation if VAT is applicable.

Total Price for this Tender

£

in words

Declaration

I/We, having read and understood the Invitation to Tender hereby offer to supply the Supplies in accordance with the Project Brief at the stated cost, and that this offer remains valid for a period of ninety (90) days.

Duly authorised to submit Tenders for and on behalf of the Company:

Name:

Signature:

Date:

Company:

Telephone:

E-mail: