

# Quote request

**For communications support – creative and technical**

**27 April 2021**

# Communications support – creative and technical

## Overview

Fair4All Finance is seeking a provider or individual to provide creative communications support on brand, design and copywriting to ensure our communications are clear, consistent and impactful.

We are also seeking technical support to conduct a user experience review of our website, with the aim of improving stakeholder journeys and ultimately increasing engagement with our work and resources.

## About Fair4All Finance

Fair4All Finance is a not-for-profit organisation founded in early 2019 to increase the financial wellbeing of people in vulnerable circumstances by increasing access to fair, affordable and appropriate financial products and services.

We have three main priority areas:

- Expanding provision of affordable credit through a scaled community finance sector
- Partnering with banks and financial services providers to support the delivery of products and services for customers in vulnerable circumstances
- New product and market development – developing and scaling products and services to address market gaps

You can find our full strategy [here](#).

## Introduction

Clear communications are critical in helping us meet our strategic priorities and achieving systems change.

We have three core beliefs that inform our approach and communications:

- 1 Financial products and services can and should serve people in vulnerable circumstances
- 2 Fair financial products and services improve people's wellbeing
- 3 Financial inclusion is the responsibility of the whole financial sector

And our stakeholder-led strategy is broadly grouped into three categories:

- 1 Working with our **close community** of mission aligned organisations to better serve people in vulnerable circumstances – includes alternative providers, charities, think-tanks, social investors etc
- 2 Engaging the **mainstream financial sector** and building the case for them to further serve this customer group
- 3 Working with **government and regulators** to ensure systems change is enshrined and sustained

We have clear messaging and a targeted stakeholder engagement and communications plan. We are seeking support to execute this plan across 2021.

## The Specification

We would like to work with a provider or individual who has experience of working with a small team with big ambitions. We value creative input and welcome ideas on how to improve the look and feel of our communications. The nature of our work means there will also be times when tight turnarounds are needed, so a flexible and pragmatic approach would be welcome.

We are seeking someone who can understand our messages, our audiences and communications objectives and bring this understanding to the work.

The specific support we're seeking falls into 3 categories:

### A Brand

1 Create branded Office 365 Word and PowerPoint template documents that are simple to use for any team member and ensure consistency with our current brand guidelines. These templates should have fully designed themes and document styles that translate across smart art design and be integrated in Office 365 (web and desktop versions) including SharePoint to support ease of use. To include the following:

- Microsoft Word: drop down template selection for
  - Letterhead
  - Minutes
  - Reports
  - Plain documents
- PowerPoint: reports and presentation format
- Excel - basic spreadsheet to embed brand theme and styles
- Email, for use in MailChimp
- Training to the Fair4All Finance team on the use of the templates and brand guidelines

We mainly use Mac OS Catalina as our operating system with Office 365 for Mac, although some users are on PC. It is critical that all templates and embedded elements can work across platforms.

2 Evolve and simplify our current brand guidelines in line with user feedback (ironing out quirks rather than revolution), explore 'house style' guidelines on tone of voice and support us in having user guides for the team in addition to a technical brand design brief for external designers. We want to use open punctuation and have a clean visual identity to make our work meet high accessibility standards.

Ultimately, we want to quickly get to brand guidelines and template documents that are easy to use, simple to follow and that set our team up to consistently create on-brand communications.

### B Design and copywriting

1 Ongoing desktop publishing and copywriting support for regular publications, including:

- Reports
- Newsletters
- Social media graphics and infographics (including templates to pull out quotes, key info from reports etc)
- Presentations
- Web content including news stories etc

All of the above should be produced in line with our brand guidelines. Turnaround times will vary depending on the size and nature of the job (eg a regular report vs a one-off presentation) and there will be times when we need a quick response.

- 2 Creative design on larger pieces of work eg Annual Report & Accounts, key strategic reports, infographics etc – taking raw content and turning these into publishable material
- 3 Design and create short explainer videos/animations for website, presentations and social media

For 2 and 3 above, we are looking for creative ideas and concepts to progress our initial briefs into clear and engaging content. You can find examples of our current communications in our [strategy](#), [technology report](#) and [animation](#).

### C Website

- 1 UX review of our website [www.fair4allfinance.org.uk](http://www.fair4allfinance.org.uk) to include structure and content and alignment with brand guidelines. Subsequent implementation of recommendations

A one-off review with the objective of improving the customer journeys for our key stakeholders and ultimately increase their engagement with our work and resources.

## Outputs/deliverables

- A set of branded template documents, embedded into Office 365 for ease of use
- Updated brand guidelines and ‘house style’
- Ongoing design and copywriting support
- UX review of our website with associated updates

Per the brief, there will be ad-hoc support through the period of our engagement. We’re looking to partner with a provider that can support us across lots of areas, so being able to draw on different skill sets through the engagement period will be valuable.

## Timings

Stage	Dates
EOI published	27 April 2021
Proposals due	10 May 2021
Assessment	w/c 10 May 2021
Decisions made	By 14 May 2021
Other stages as required	Possible interviews during assessment period
Work to be delivered by	<ul style="list-style-type: none"> <li>• Branded template documents – 11 June 2021</li> <li>• Updated brand guidelines and ‘house style’ – 11 June 2021</li> <li>• Design and copywriting support – ongoing</li> <li>• Website UX – 30 September 2021</li> </ul>

## Your response

To respond to this EOI, please provide a proposal for how you would deliver the required specification for services as outlined above. The proposal assessment criteria and requirements are set out below.

If you have any clarification questions on this quote request, please email them to [james@fair4allfinance.org.uk](mailto:james@fair4allfinance.org.uk) by 4 May 2021.

Any question responses which are relevant to all will be shared with all applying parties. If you intend to submit a quote, please advise us at your earliest convenience so that question responses can be shared. Questions will be anonymised before responses are shared with respondents.

**If you are able to do one part of the brief but not the brief in its entirety, please do respond to either the brand, design and copywriting support (A&B) or the website support (C) as individual pieces of work. We are open to contracting separate organisations for these two elements, a single organisation for both or a lead supplier who takes ownership for subcontracting aspects of the work to deliver on the brief.**

## Budget and pricing

- The scope of this procurement is for the remainder of 2021. Both parties may decide to extend the agreement beyond this year should there be requirement
- The brand element (A) has a guiding budget up to £12,500 including VAT, travel and all other expenses
- We expect the design and copywriting elements (B) to average out at 1.5 days per week support through to the end of the year. For these, the budget is £20,000 including VAT, travel and all other expenses. We would like to arrange a contract such that this is drawn down as resource that is deployed to specific tasks
- The web element (C) is more discrete and has a budget of £12,500 including VAT, travel and all other expenses
- Given the not-for-profit nature of Fair4All Finance, and our founding and funding through government, please indicate where you have given a discount on commercial rates
- Please outline any VAT and or expenses which may be payable clearly and separately

## Proposal submission and scoring criteria

Please email a proposal of no more than 4-5 pages long to [james@fair4allfinance.org.uk](mailto:james@fair4allfinance.org.uk) by the deadline indicated above. Proposals submitted will be assessed by Fair4All Finance against the following questions

<p><b>1 Understanding of requirements</b></p> <p>Please explain what you understand Fair4All Finance is aiming to achieve in commissioning this work.</p> <p><b>To what extent does the proposal demonstrate an understanding of the issues related to this brief?</b></p>	10%
<p><b>2 Please set out your proposed methodology</b></p> <p><b>To what extent are the methodology and methods appropriate to the requirements set out in this brief?</b></p>	20%
<p><b>3 Relevant experience</b></p> <p>Please set out your experience relevant to this request. Please include specific examples related to our brief as relevant to your response. Please include at least one example for each brief element (eg a template document, a report, copywriting and web projects).</p> <p>Please provide the name of two references we can contact in confidence, and at our sole discretion to confirm the work you undertook and its relevance.</p> <p><b>What degree of experience does the bidder demonstrate in order to successfully complete the work?</b></p>	40%
<p><b>4 Appropriate resourcing and delivery timelines</b></p> <p>Please set out your resourcing plan and assumptions about the time commitments you plan to make.</p> <p>Please make it explicitly clear who will be accountable for the work and who our day-to-day contact will be.</p> <p><b>How well has the bidder structured a team in order to successfully manage the contract and deliver the required work to the budget and timetable required?</b></p>	15%
<p><b>5 Value for money</b></p> <p><b>To what extent does the proposal represent good value for money and use of public funds?</b></p>	15%

## Notes

- Quote request responses not received by the deadline will not be considered
- Quotations shall be valid for 90 days.
- All bidders are solely responsible for all their costs and expenses incurred in connection with this procurement process at all stages
- Fair4All Finance reserves the right to amend or cancel the procurement exercise at any point. Fair4All Finance will accept no liability for any losses caused by any change or cancellation of this procurement exercise nor any decision not to award a Contract
- Any information submitted to Fair4All Finance may need to be disclosed and/or published by Fair4All Finance. Fair4All Finance may disclose information in compliance with the Freedom of Information Act 2000, any other law, or, as a consequence of judicial order, or order by any court or tribunal with Fair4All Finance to order disclosure
- Data Protection Act 2018 - Any awarded Contract will be subject to the Data Protection Act (DPA) 2018. Fair4All Finance reserve the right to request additional evidence to undertake sufficient due diligence of any Tenderer to ensure they have implemented the appropriate technical and organisational measures to comply with the act
- Fair4All Finance is committed to greater transparency and may publish its tender documents, contracts and data from invoices received and may at its discretion redact all or part of such information prior to publication
- Bidders shall not (and shall procure that their subcontractors and representatives do not) do any of the following without obtaining the prior written consent of Fair4All Finance
  - Make a public statement or communicate in any form with the media in connection with this procurement
  - Use any trademarks, logos or other intellectual property rights associated with Fair4All Finance and/or its stakeholders
  - Represent that the Bidder is directly or indirectly associated in any way with Fair4All Finance and/or its stakeholders or that its or their respective products and/or services are in any way endorsed by Fair4All Finance and/or its stakeholders
  - Do anything or refrain from doing anything which would have an adverse effect on or embarrass Fair4All Finance and/or its stakeholders
- Bidders with abnormally low prices may be rejected by Fair4All Finance. Prices that are suspiciously low in the opinion of the organisation will be considered further before a decision is taken as to whether the price is abnormally low. This will include clarification with the relevant bidder
- Fair4All Finance will award the Contract to the bidder submitting the offer that best meets scoring criteria from the point of view of Fair4All Finance
- Fair4All Finance will notify all bidders of its contract award decision