

Pontefract Academies Trust
Barracks Business Centre
Wakefield Road
Pontefract WF8 4HH

INVITATION TO TENDER

Dear potential bidder,

INVITATION TO TENDER (ITT) FOR THE EXTERNAL SERVICE OF GRAPIC DESIGN, WEB SERVICES, PHOTOGRAPHY AND VIDEOGRAPHY.

- 1 The Trust is procuring the external service of graphic design, web services, photography, and videography for its eight schools and central Trust all in Pontefract comprising of two secondary and six primary schools. Further information about the Trust can be found at www.pontefractacademiestrust.org.uk and below.
- 2 Enclosed are:
 - Overview and background information.
 - Instructions and information on the tendering procedures.
 - A list of deliverables that are required annually by the Trust to fulfil the needs of all eight schools.
- 3 Please read the instructions on the tendering procedures carefully. Failure to comply with them will invalidate your tender which must be returned by the date and time given below.

I look forward to your response.

Yours sincerely

Abi Leung
Marketing and Communications Manager

OVERVIEW AND BACKGROUND INFORMATION

About

Pontefract Academies Trust was formed in 2013 and is a Multi Academy Trust comprising of eight schools, six primaries and two 11-16 secondary schools. The Trust are a medium sized family of schools all located within Pontefract. We educate over 3900 children and young people across the town.

Schools within the Trust:

Pontefract Academies Trust > <https://www.pontefractacademiestrust.org.uk/>

Carleton Park Junior & Infant School > <https://carletonpark.patrust.org.uk/>

De Lacy Pontefract Primary School > <https://delacy.patrust.org.uk/>

Halfpenny Lane Junior, Infant & Nursery School > <https://halfpenny.patrust.org.uk/>

Larks Hill Junior & Infant School > <https://larkshill.patrust.org.uk/>

Orchard Head Junior, Infant & Nursery School > <https://orchardhead.patrust.org.uk/>

The Rookeries Carleton Junior, Infant and Nursery School > <https://rookeries.patrust.org.uk/>

Carleton High School > <https://carletonhigh.patrust.org.uk/>

The King's School > <https://kings.patrust.org.uk/>

Reasoning

We currently have a Marketing and Communications Manager in house who leads on all aspects of marketing, communications, and PR with a clear marketing and comms strategy to work towards. By working with an external agency, we are looking for a company to be an extension of our team to create the best results possible. We are looking for an exceptional creative agency that understands and resonates with our own mission, vision, and values. We want to work with an agency who can quickly grasp the brief for specific pieces of work and produce a great result that delivers against our objectives. Our marketing and communications cover a wide range of stakeholders and our chosen agency would preferably have experience working with a full range of stakeholders.

We need an agency that has great experience and skills in:

- Brand development and management
- Design – for online and print media
- Digital – particularly in working with Wordpress

Flexibility

Sometimes we will need to move quickly and will need an agency that is quick to respond. We also need an agency that can be flexible with us when we have small jobs that need doing urgently. Although our workflow tends to be cyclical, there are occasional jobs that fall out of this remit.

Copyright issues and GDPR

Ownership of assets created including the content and imagery will be in sole ownership of Pontefract Academies Trust. Under the General Data Protection Regulation (GDPR), many companies have had to make significant operational changes to comply with new obligations. Pontefract Academies Trust must adhere to GDPR in all marketing and communications.

INSTRUCTIONS AND INFORMATION ON TENDERING PROCEDURES

- 1 These instructions are designed to ensure that all tenders are given equal and fair consideration. It is important therefore that you provide all the information asked for in the format and order specified. You may submit requests for any additional information or clarification. Please contact Abi Leung, Marketing and Communications Manager at aleung@patrust.org.uk if you have any questions. Any requests will be responded to as quickly as possible. Please note there will be limited access to email between 31st May – 4th June. Pre-tender negotiations are **not** allowed.

Contract period

- 2 The contract is fixed and will be for 1 year starting in Summer 2021 (actual date TBC when arranging final contract). There will be an option to extend for a further second year.

Incomplete tender

- 3 Tenders will be rejected if the information asked for is not given at the time of tendering.

Returning tenders

- 4 All bids should be sent to tender@patrust.org.uk. Tenders must be received by 21st June 2021 at noon.

Receipt of tenders

- 5 Tenders will be accepted up to the time and date stated. It is the responsibility of the tenderer to ensure that their tender is delivered no later than the appointed time/date.

Acceptance of tenders

- 6 By issuing this invitation the Trust is not bound in any way and does not have to accept the lowest or any tender and reserves the right to accept a portion of any tender unless the tenderer expressly stipulates otherwise in their tender. The Trust also reserves the right to not accept any tender issued.

Inducements

- 7 Offering an inducement of any kind in relation to obtaining this or any other contract with the Trust will disqualify your tender from being considered and may constitute a criminal offence.

Confidentiality of tenders

- 8 Please note the following requirements, you must not:
 - Tell anyone else what your tender price is or will be before the time limit for delivery of tenders.
 - Try to obtain any information about anyone else's tender or proposed tender before the time limit for delivery of tenders.

- Make any arrangements with another organisation about whether they should tender, or about their or your tender price.

Failure to comply with these conditions may disqualify your tender.

Costs and expenses

- 9 You will not be entitled to claim from the Trust any costs or expenses which you may incur in preparing your tender whether your tender is successful or not.

Retainer

- 10 Our preferred method of contract would be on a monthly retainer. In your tender response please highlight how you would consider the breakdown of payment across the year.

Portfolio

- 11 Inclusion of a small portfolio is essential to be considered for this tender application. Please where possible include work of a similar nature to Pontefract Academies Trust (please see the list of deliverables for examples). Experience of working within education is desirable but not essential.

References

- 12 Please include 2 clients that you currently work for in the context of design and web that you would be happy for us to contact as a reference of your work. We will only potentially contact references of the top 3 tenderers.

Your company information

- 13 We require the following:
- Name of company, company registration number, contact person, phone number and email.
 - Place of business and postal address.
 - Tax clearance certificate and annual turnover (not essential).
 - Your proposed team. Please provide details of who will be the lead on this project, whether work will be done via freelancers or current employees and how you will ensure our requirements are covered throughout the year.
 - Please provide details of the Account Manager or specific person who will be the direct contact for the Trust.
 - Copies of your public liability and professional indemnity insurances.

Debriefing

- 14 Following the award of contract, debriefing will be included on request.

Evaluation criteria

- 15 The tender process will be conducted in a manner that ensures tenders are evaluated fairly

to ascertain the most economically advantageous tender.

- 16 Your capability to perform the contract will be evaluated using selection and award criteria set out in Annex 1.

Freedom of information

- 17 The Trust is committed to open government and to meeting their responsibilities under the Freedom of Information Act 2000. Accordingly, all information submitted to the Trust may need to be disclosed in response to a request under the Act. If you consider that any of the information included in your tender is commercially sensitive, please identify it and explain (in broad terms) what harm may result from disclosure if a request is received, and the time period applicable to that sensitivity. You should be aware that, even where you have indicated that information is commercially sensitive, we may still be required to disclose it under the Act if a request is received. Please also note that the receipt of any material marked 'confidential' or equivalent by the Trust should not be taken to mean that we accept any duty of confidence by virtue of that marking. If a request is received, we may also be required to disclose details of unsuccessful tenders.

Tender period

- 18 Two years. Second year will be based on performance.

Basis of the contract

- 19 The specification in the list of deliverables, and your offer of terms and conditions will form the basis of the contract between the successful tenderer and the Trust.
- 20 An SLA will be drawn up once the tender process is finalised, but this submission will form the basis of any agreement and you agree to provide services on these terms and in accordance with the Trust general conditions of contract (available on request). Any variations to these conditions must be noted for consideration.
- 21 This timetable is provisional and may be subject to change but will be adhered to by the Trust as far as reasonably possible.

ACTIVITY	TIMESCALE
Advertise	26/05/2021
Formal clarification requests from bidders	2 weeks prior to closing date
Submission deadline for receipt of bids	21/06/2021 @ noon
Shortlist to be advised and bidders meetings/presentations	w/c 28/06/2021
Review by Trust Board and planned award contract	w/c 20/07/2021

Format of bids

- 22 Tenderers should present their proposals confirming the service against the tender. You may attach separately as needed.

Key Performance Indicators

- 23 Key performance indicators will be in place between the Trust and the awarded tenderer to ensure the contract is being monitored effectively.

Annex 1

Evaluation scoring matrix

The following scoring matrix will be used for bids in the evaluation stage.

0-5 scoring system:

Assessment	Score	Summary
Excellent	5	Very strong evidence of requirements met.
Good	4	Sufficient evidence provided of requirements met
Acceptable	3	Reasonable evidence of requirements met
Minor Reservation	2	Some evidence of requirements met but with important omissions
Serious Reservations	1	Very little evidence of requirements met
Unacceptable	0	No evidence/response - bid rejected

Example scoring and weighting grid

Your capability to perform the contract will be evaluated using the criteria set out below and the scoring matrix above. Subject to scoring outcomes a shortlist of bids may be drawn up and bidders invited to present their proposals, scores may be moderated against the original analysis (other than price). The highest scoring bids will be considered the most economically advantageous tender and the successful bidder notified.

Scoring grid example

	Assessment Criteria (should clearly state expected outcomes in each heading)	Weighting	Assessment Score (0-5)	Total score
Ref	Requirements met	60		
	Specification of ability to deliver the full list of deliverables to a high standard	40		
	Desirability of portfolio and potential brand ideas for the Trust	20		
Ref	Price and Costs	40		
	Price excluding VAT per deliverable schedule	40		
	TOTAL	100		

LIST OF DELIVERABLES

Please complete all the boxes that relate to cost, cost of design and cost of print in the below table.

GRAPHIC DESIGN					
Item	Specification	Cost for design	Quantity for print	Cost for print	Month of work
Brand Guidelines	Update and refresh our current brand guidelines integrating new style ideas but not differing too much from what currently exists.		1		June
Uniform Guides	A4 - 4 pages		1000		Ad hoc
Stationery - letterheads, comp slips and business cards	9 designs for each		5000 letterheads		Ad hoc
Ofsted and achievement posters	6 versions for each school / 48 designs - A1 size		48		Ad hoc
Internal directional and departmental signage (for 5 schools only)	30 designs per school / various materials including vinyl and di-bond / various sizes		240 signs		Ad hoc
Internal displays for primary schools	Consists of photo boards, school values, classroom consequences, house points, attendance and the curriculum mural. 40 designs in total in large format		320 signs		Ad hoc
Secondary school corridor displays	Include success stories, enrichment, equality and diversity, health and wellbeing, attendance, safeguarding, DoF. 30 designs in total in large format.		240 signs		Ad hoc
Secondary school prospectus	2 x 24 pages A4		1000		August
Primary school prospectus	A4 - 30 pages		250		August
Secondary school enrichment guides	2 x 4 pages		250		June
Secondary student expectations	2 x 4 pages		250		June
Student planners	2 x 112-page A4 booklets		500		July
Staff planners	2 x 268-page A4 booklets		200		July
Open evening leaflet	2 x A5 double sided		250		September
Open evening digital advert	15 second motion graphic designed for the 2 secondaries for use on social media		n/a		September
Open evening banners	2 x 3x3m banner for outdoors		2		September
Open evening booklet	2 x 8 pages A4		250		September
Literature and event folders	6 x A4		1000		April and ad hoc
PowerPoint presentations	8 x 12-page presentations. Need to be editable.		n/a		Ad hoc
Primary reading strategy	4-page A4 document		n/a		Feb
Primary and secondary overviews	4-page A4 document		n/a		Feb
Career prospectus	16 pages - A4		250		March
Sports newsletter	4 annually 2-page A4 document - online only		n/a		Seasonal
Teaching and learning model	96-page brochure - A4 (updated every 3 years)		300		October
Trust magazine	24 page - A4 booklet - created 4 times a year		250 per print run		Seasonal
Primary newsletters	Template maybe through mailchimp designed to be used weekly.		n/a		August
Branded content for social media	Image templates to use on social media x 10		n/a		Seasonal
Key stage 4 options booklet	2 x 28-page A4 booklet		500		Feb
Key stage 4 presentation	2 x 10-page A4 booklet		500		Feb
Key stage 3 graduation booklet	2 x 28-page A4 booklet		250		April
Secondary school newsletters	6 x 4 page - online only		n/a		Seasonal
Results day banner	2 x 3x3m banner for outdoors		2		August
Job packs for recruitment	5 x 10 A4 pages		n/a		Ad hoc
Secondary school Christmas card	A5 card - design only x 2 designs		250 per design		December
Leave of absence brochure	A5 - 4-page leaflet - 2 designs		250		January
Welcome to Year 7 Postcard	2 designs - postcard size		200 per design		July
Safeguarding poster	8 designs x A4		10 per design		Ad hoc
Strategic Plan	28-page A4 booklet		100		September
SPRB booklet	36-page A4 booklet		n/a		Ad hoc
Wellbeing poster	1 x A4 design		n/a		March
Trust Christmas animation	20 second animation		n/a		December
Parent preparing for exams leaflet	2 x 2-page A5 leaflet		250 per design		April
Students coping with exam stress leaflet	2 x 2-page A5 leaflet		250 per design		April
Important information booklet	2 x 8-page A4 booklet		250 per design		April
Adhoc design	This is work that isn't accounted for annually. This will include a minimum amount of artwork and limited design		n/a		Adhoc
		Total cost for graphic design:			

WEB					
Item	Specification	Cost			Month of work
Hosting of 9 websites	Ability to host all 9 of our websites and transfer accordingly				All year round
Updates to all 9 websites throughout the year - averaging 10 hours per month	Our websites are built using wordpress. We would request a wordpress competent person who can help with updates and amends throughout the month.				All year round
Further develop a job application system via the website	We would be looking to implement an online application system for prospective new employees.				August
Introduce a sports section on all 9 websites	We would be looking to create a sports section on all 8 school websites and the Trust website. This would be a 1-4-page design per website.				August
Headers on all websites - once new photography has taken place these will all need changing	Once we have new photography we will need to edit and replace all of the current headers on all 9 websites.				July
Term dates on websites	These need updating annually.				May
Build in an online application and consent form that links with the school CMS	This would need to be bespoke to each school and talk to our school CMS to ensure efficiency of data capture.				June
Website lightboxes	We require around 40 designs per year to show on the front page of our websites.				All year round
		Total cost for web:			
PHOTOGRAPHY AND VIDEOGRAPHY					
Item	Specification	Cost			Month of work
Annual photoshoot for all schools	8 x full day photo shoots including editing and handover of images with full ownership given to the Trust. Approximately 400-600 photographs.				July or September
Results day photoshoots	2 x half day shoots for each of the secondary schools. Editing and handover of images with full ownership given to the Trust.				August
Promotional videos for all schools	Videography shoots and edits of 2-3-minute videos for all schools. Create second cuts which are 30 seconds produced for placements on the websites.				July or September
Trust staff photoshoot	1 x half day photo shoot of all central staff team				Adhoc
Trust video	A combined edit which covers all schools for the Trust				July or September
Sports video	A video which covers the sport provision at all 8 schools				October
Recruitment video	A range of videos of various staff members explaining why they enjoy working at the Trust. 5 x 30 second edits.				Adhoc
Nursery promotional video	4 x annual videos of our nursery provision in each school. Full day filming per video and 3-minute edit.				April
Trust magazine videos	4 x 15 second animation videos				Seasonal
Transition video	2 x Key stage 4 videos - full day filming and 2 min edit				June
Host a Vimeo account for the Trust					All year round
		Total cost for photography and videography:			
		Total cost of all works:			

I accept the term and conditions set out and have submitted all the responses / information requested.

Signed:

Name:

Company: