**Invitation to Tender: Marketing Contract**

Dear Contractor

Your organisation is invited to submit a tender for the supply of Marketing Services for Ferne Animal Sanctuary.

Please submit a service proposal in response to the specification enclosed.

* Part 1 Instructions to Tenderers
* Part 2 Background: about Ferne Animal Sanctuary
* Part 3 Terms of Reference: ITT selection criteria
* Part 4: Form of Offer

It is the responsibility of the tenderer to ensure that offers are received by 10th February 2023 Tenders received after this time will not be considered.

**Please acknowledge receipt of this Invitation to Tender** and confirm by 30th January 2023 whether you will be submitting a proposal.

Yours sincerely

Emma Purnell

Finance Manager

Ferne Animal Sanctuary

**Part 1 - Instructions for responding to the Invitation to Tender**

Please read and understand these instructions before responding, to ensure that your tender meets our requirements. Ferne Animal Sanctuary reserves the right to refuse non-compliant tenders.

Only information provided as a direct response to the specification will be evaluated. Potential contractors should respond on the basis that Ferne Animal Sanctuary has no prior knowledge of their organisation. Information and detail which forms part of general company literature or promotional brochures etc. will not form part of the evaluation process.

1. **Key dates**

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| --- | --- |
| Activity | Date |
| Issue ITT | 18/01/2023 |
| Closing date for completed tenders | + 3 weeks – 10th February 2023 |
| Shortlisting | Week of closing date |
| Presentations to evaluation panel | + 2 weeks |
| Select supplier, Finalise & Agree contract | + 1 week WC |
| Period of agreement | A minimum of three years with option to extend subject to mutual agreement |

1. **Communications**
2. **Completed tenders** must be returned to Emma Purnell emma@ferneanimalsanctuary.org
3. **Clarification questions** regarding the tender documents or process must be made in writing by email to Emma

Clarification questions will be responded to within 3 working days. All clarification questions and responses will be anonymised and compiled into a single file and shared with all bidders on a timely basis.

1. **Format for responding**

Please provide a written proposal in response to the Terms of Reference: ITT selection criteria (part 3 of this document) and complete the Form of Offer (part 4 of this document). Key contact details and company information should be easily identifiable; no promotional information should be included.

The Charity’s objectives for this tender process are to secure a high-quality provider of marketing services that can demonstrate a clear understanding of Ferne Animal Sanctuary, whilst achieving excellent value for money.

Your proposal should cover all aspects of the tender requirements and communicate how your organisation will add value to Ferne Animal Sanctuary.

1. **Evaluation process**

Compliant bids will be evaluated by a panel made up of the Finance Manager, Marketing Assistant and a representative from our Fundraising & Retail teams to form a shortlist.

Shortlisted bidders will be invited to present their proposal in full in the form of an interview with a panel.

1. **Selection**

Ferne Animal Sanctuary intends to select a single provider for the services.

The selected provider will be contacted during week commencing 13th March 2023 at which time the parties will begin finalising the contract and agree an implementation plan.

Unsuccessful bidders will also be notified during week commencing 13th March 2023. Feedback can be provided on request.

Ferne Animal Sanctuary reserves the right to change any aspect of, or cease, the tender process at any time. While Ferne Animal Sanctuary has taken all reasonable steps to ensure that the facts contained in this ITT are true and accurate in all material respects, Ferne Animal Sanctuary does not make any representation or warranty as to the accuracy or completeness or otherwise of this ITT, or the reasonableness of any assumptions on which this document may be based.

As part of this tender process Ferne makes no obligation in any way to:

* Pay any vendor for any ITT response
* Award the contract to the lowest tenderer
* Make any commitment to choose from any of those who tender

All information supplied by Ferne Animal Sanctuary to the tenderers, including that contained in this ITT, is subject to the supplier’s own due diligence. Ferne Animal Sanctuary accepts no liability to tenderers whatsoever and however arising and whether resulting from the use of this ITT, or any omissions from or deficiencies in this document.

It is the responsibility of potential suppliers to obtain for themselves at their own expense all additional information necessary for the preparation of their response to this ITT. No claims of insufficient knowledge will be entertained.

**Part 2 - About Ferne Animal Sanctuary**

**About Ferne Animal Sanctuary**

Ferne Animal Sanctuary was founded by the late Nina, Duchess of Hamilton & Brandon at the beginning of the Second World War. Her aim was to provide a temporary refuge for the animals belonging to service men and women who were shipped abroad to fight. Inevitably at the end of the war many owners failed to return to collect their pets and so the story of Ferne Animal Sanctuary began.

80 years later the Sanctuary is still acting as a refuge for animals of all shapes & sizes from across the county and beyond. It is perhaps sad that there is still a need for an organisation like ours and that this need gets greater year on year however we are exceptionally grateful that through generous donations & volunteer support we are still able to fulfil this vital role. We hope the Duchess would approve!

**Vision**

A world where people respect animals and treat them with compassion

**Mission**

To be a centre of excellence for animal care and rehabilitation through education, support and re-homing.

**Our strategic objectives**

At their core and fundamental to us is the care for unwanted and abandoned animals:

* To improve the welfare of animals through changing people’s behaviour
* To expand our operation to ensure we can meet the needs of the growing number of animals surrendered to us
* To maximise re-homing opportunities for all animals surrendered to our care
* To provide the knowledge and skills the staff and volunteers need to carry out their roles effectively
* To maintain our policies and practices to ensure the long-term financial sustainability of the charity
* To fundraise effectively to deliver our strategy

**Core values**

These core values will be at the centre of all our interactions with others including the animals in need and across the broad spectrum of humans we encounter as an organisation including each other. These values should shape a compassionate team culture where everyone is valued and when combined build trust within the organisation and the wider community, enhancing the Sanctuary’s reputation for the work we do for animals and gaining the support of the community with how we interact at all levels. This utilises positive human behaviour for the wider benefit of animal welfare which ultimately is why we are all here.

* Empathy - We endeavour to be able to put ourselves in someone else’s situation especially in challenging times and see things from their point of view, human or animal.
* Kindness - Being friendly, generous and considerate of others and their feelings.
* Inclusive - Everyone’s voice and input is valued. Only with open mindedness can we continue to grow and evolve valuing the individual.
* Honesty - To be upfront and transparent with no hidden agenda.
* Respect - To be offered in all interactions with any living being. We all have different roles for a common goal.

**Rehabilitating and rehoming**

For over eighty years Ferne has cared for abandoned and unwanted animals. Many of the animals surrendered to us have physical or psychological issues that need addressing:

* All animals put up for re-homing will be individually assessed and an appropriate rehabilitation programme devised and delivered.
* We will work closely with prospective new owners to help them understand the needs of the animal that they are adopting and support them through the process to maximise our adoption successes.
* Through our Veterinary Support Fund, we will treat animals with physical and or psychological health problems whether these are short or long term but always with the best interests of the animal in mind.
* To that end we will work closely with our veterinary advisors and where necessary seek advice from specialists in their field.

**Growing**

* We will grow our capacity to help and support animals through the purchase of the Montague Panton Farm.
* We will use the additional space to help more animals providing this is financially sustainable.
* We will develop our equine rehabilitation work so that we can accommodate the rehabilitation of more horses and wherever feasible rehome them and return them to the community.
* We will continue to provide sanctuary spaces on the basis of need but without compromising the welfare of existing populations.

**Influencing**

* We will continue to take in, rehabilitate and re-home animals wherever practicable thus ensuring we have capacity to take in those cases of urgent need.
* We will work with other charities to work to bring an end to the needless suffering of animals through education, information and providing sanctuary.
* We will expand our work to link with government and regulators to challenge the appropriateness of legislation and to identify where this is not fit for purpose.
* We will work with likeminded groups such as the Association of Cats and Dogs Homes to raise standards in animal welfare so that Ferne can be seen as an exemplar of best practice for all the animals it cares for.

**Educating**

We will reach out to schools, communities and families to help them understand the challenges and responsibilities of animal ownership and we will embrace current and future technologies to assist us in our work.

**Training and developing**

* We will support our staff through training and where possible advancement within our organisation whilst recognising the constraints on us as a medium sized charity.
* We will encourage our staff to seek out opportunities to further their knowledge and skills through secondments to other like-minded organisations.

**Funding**

As a charity we are wholly dependent on the generosity of people to keep going. We have been fortunate to receive significant amounts of money through legacies but we recognise that this may not be sustainable in the long term.

* Over the next five years we will continue to develop and expand our income generation through fundraising, from donations and continuing to work with potential legators to help them understand the value to us of a bequest.
* We will expand our trading activities to increase income generation from visitors, shoppers – both on and offline and by increasing the number of charity shops we operate from 4 to 20 by 2027. All trading will be consistent with the ethos of our organisation and carefully risk-assessed to ensure it meets our criteria.
* We will expand our fundraising to taking advantage of opportunities from digital developments but mindful that in all cases we will monitor and evaluate the return on our investment.

**Measuring and Monitoring**

We continue to monitor the success of all of our endeavours through a series of metrics that reflect the change we are trying to affect. We will report on our successes and failures through our Annual Review and will continue to seek feedback on our work from supporters, staff and volunteers.

**Ferne Animal Sanctuary teams:**

* **Animal Care** our animal care team core focus is the wellbeing of our resident animals looking after their day to day needs and enrichment as well as providing rehabilitation care. Ensuring, the care and wellbeing of the animals in the care of Ferne Animal Sanctuary is at the heart of all our activities. Ferne Animal Sanctuary also runs a rehoming centre for unwanted Cats, Dogs & Horses.
* **Estates** are responsible for the day-to-day maintenance of Ferne Animal Sanctuary, with oversight of all building projects and H&S responsibilities.
* **Fundraising** focus on fundraising through a various means including individual giving, events and appeals.
* **Charity Retail** currently Ferne Animal Sanctuary operates four charity shops in Somerset & Devon, our strategy is to open a further 16 over the next 5 year; as well as develop and expand our eBay shop.
* **Visitor Services** the Sanctuary is open to the public and comprises of Visitor Services, Activities, Gift Shop
* **Nina’s Café** our refurbished café is open to both visitors of the sanctuary and the general public, serving fresh locally sourced rustic menu. The café also offer a selection of home-made cakes, and specials through the year.
* **Support** comprises of HR, Finance, and the CEO’s office, providing support to the whole charity.

**Part 3 - Terms of Reference: invitation to tender selection criteria**

1. **Marketing capacity**

The aim of this contract is to deliver the Marketing & Advertising Strategy and to work collaboratively with the Marketing Assistant. Provide advice on campaigns and work in conjunction with the Finance Manager and members of the Fundraising and Retail teams, delivering and reporting on the performance of the contract.

**Key areas**

**Retail**

* **Charity Shop Retail:** We are expanding our retail operations to increase the number of outlets generating vital funds for the sanctuary. We aim to grow local awareness through footfall in the charity shops and bounce back offers to increase visitors to the sanctuary.
* **Nina’s:** We are looking to expand awareness of Nina’s Café, offering an alternative and independent café that is raising funds for Ferne Animal Sanctuary.
* **Visitors:** We rely on visitor income to help support our work. The annual visitor income pays for 3 animal care attendants and delivers education objectives in animal welfare. Visits raise income as well as awareness and provide us with prospective new pet owners, subject to our usual checks.

**Fundraising**

* Ferne cannot function without donors and the more the merrier. Using all the channels available we must acquire, sustain, and care for our donors to death! Our donors range in age from 2-102 so we need to use all channels available to promote our work and thank our donors for their support.

**Re-homing / Animal Welfare**

* **Rehoming** We re-home around 500 animals each year. Animals surrendered to us range from very straightforward to re-home through to those who have complex needs and will need extra special people to adopt them. To find those people we will advertise.
* **Activities & Education:** We deliver both formal and non-formal education through school visits and visitors on admission. Formal education has reduced substantially since Covid with taught time under severe pressure.

1. **Cultural fit**

Ferne Animal Sanctuary is seeking a marketing company that understands and sympathises with our purpose, values, and vision.

1. **Technical competency & experience in, Charity Sector, Retail & Tourism**

* We are seeking a company that has worked in the charity sector previously and understands that every £1 invested in marketing has to be donated in one form or another. We expect our marketing company to be aware of and actively leading developments in the sector and advising on best practice.
* We are seeking a company that will support our retail strategy and growth plans over the next five years, as well as supporting the growth plans for Nina’s Café
* We are seeking experience in the tourism sector to support growth plans for visitors to the sanctuary and promoting the Events and Activities held at the Sanctuary.

1. **Value for money**

We expect our marketers to be proactive in the relationship, sharing experience, knowledge, and ideas so they can add value across all our promotions and campaigns.

We would like to see a focus on reducing the overall cost of external marketing contractor to the Charity while at the same time maintaining /enhancing value.

1. **Team competency**

The supplier is expected to appoint a suitably skilled and experienced team to carry out the programme. Please provide an overview of the team structure, and levels of qualification and experience.

You will be required to provide regular campaign reporting and required to attend a quarterly performance & contract management meeting, with Finance Manager, Marketing Assistant and a representative of the Fundraising and/or Retail Team.

1. **Strategy**

Your response to this invitation to tender should include an outline of your marketing strategy, including the channels you propose to use for each of the areas of marketing identified in this document.

**Part 4 - Form of Offer**

**I [insert individual name**] as the Authorised Representative of **[insert name of Bidder]** (‘the Bidder’) of **[insert address of Bidder]**

**Confirms:**

I have examined the information provided:

* Part 1 Instructions to Tenderers
* Part 2 Background: about Ferne Animal Sanctuary
* Part 3 Terms of Reference: ITT selection criteria
* Part 4: Form of Offer

**Agrees**

1. That this offer and any contracts arising from it shall be subject to the Terms and Conditions of Contract and all other terms (if any) issued with the Invitation to Offer; and
2. To supply the services in respect of which its offer is accepted in such quantities, to such extent and at such times as ordered; and
3. That this offer is made in good faith and that the Bidder has not fixed or adjusted the amount of the offer by or in accordance with any agreement or arrangement with any other person.

The Bidder certifies that it has not and undertakes that it will not:

* 1. communicate to any person other than the person inviting these offers the amount or approximate amount of the offer, except where the disclosure, in confidence, of the approximate amount of the offer was necessary to obtain quotations required for the preparation of the offer, for insurance purposes or for a contract guarantee bond;
  2. enter into any arrangement or agreement with any other person that he or the other person(s) shall refrain from making an offer or as to the amount of any offer to be submitted.

1. That to the best of Bidder’s knowledge there are not any conflicts of interest or any circumstances that could give rise to a conflict of interest in the performance of the proposed Contract. Ferne Animal Sanctuary requires that all actual or potential conflicts of interest are resolved to the satisfaction of Ferne Animal Sanctuary prior to the submission of Bids. In the event that any actual or potential conflict of interest comes to a Bidder’s attention, that Bidder should immediately notify Ferne Animal Sanctuary.
2. The duties of Ferne Animal Sanctuary and marketing contractors should be clearly presented in the agreed terms of reference as detailed in the letter of engagement

Name: (print) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The Form of Offer must be signed by an authorised signatory: in the case of a partnership, by a partner for and on behalf of the firm; in the case of a limited company, by an officer duly authorised, the designation of the officer being state.