Request for Proposal

Project overview

Lloyd's Register Foundation is looking to partner with an agency or consultancy on a three-year transformation of our digital estate and our online offer. We are tendering for a framework contract that will enable the partner and the Foundation to work together on the Discovery phase (May–July 2022) and the subsequent Implementation phase (Autumn 2022–25).

We see this as a long term partnership opportunity and look forward to proposals from partners who have expertise spanning digital strategy and transformation, technology and infrastructure, brand and user experience, content strategy and audience engagement.

Given the timeline for our Discovery phase (the budget for which is up to £250,000) we are looking for a partner who can operate at scale and pace. Our budget for the Implementation phase will be between £1.5 and £2million over a three-year period.

We invite any interested partners to respond to the brief below with a proposal by **17:00 Thursday 7 April 2022**.

We will be running a Q&A session on **Monday 4 April 15:00-16:30**.

What we need

Over the next three years we will transform our digital estate and our online offer for our audiences. It's crucial that this Discovery phase puts us in the best position to fulfil our goals by developing the vision and strategy to define how we get there.

What we want to achieve

Through the Discovery phase we want to:

- **Create a vision and strategy** for the transformation of our digital estate to support the Foundation's goal to become the global forum for safety, and more clearly articulate the different offers of the Foundation online
- **Define a resilient, scalable infrastructure** that better supports our vision and goals, working towards consolidating the estate to be more efficient and reduce operating costs
- **Develop a new digital brand experience and better user experience** to showcase the various Foundation offers, and provide seamless, impactful experiences wherever our audiences interact with us online
- **Gain a deeper understanding of our audiences** – both existing and potential – and use these insights to reach a wider, more diverse global audience online
- **Evolve our digital content offer** to drive our impact through improved visibility, greater reach and deeper engagement with our audiences

- **Gain a clear understanding of what digital skills and capacity** we need internally to help drive our growth online
- **Have a clear set of priorities and understand what resources are needed** for our future Implementation phase.

What we're looking for in a partner

We are aware our timeline is demanding (with kick off in early May and completion by end of July 2022) and therefore we are looking to partner with an agency who can accommodate an intensive Discovery phase within a three-month period. We also are mindful that the budget is significant (up to £250,000 – see Budget section for more details) and therefore we are looking for a partner that can operate at scale and at pace.

We're looking for in a digital transformation partner with skills and expertise across the following areas:
- **Strategy** – developing a compelling digital vision underpinned by a solid strategy that's aligned with organisational goals
- **Digital transformation and change management** – partnering with a complex organisation on the journey of organisational change
- **Technology and infrastructure** – leading software development, designing technical architecture and integrating multiple systems
- **Brand experience** – creating digital brand experience, with a deep understanding of how brands live online
- **User experience** – developing quality user experience, skilled at user interface and interaction design
- **User centred approach** – generating and drawing on user insights across a wide range of audience need by researching and understanding user behaviours, modes and interactions
- **Data driven and evidence based** – monitoring digital performance, designing ways to measure value and impact
- **Digital skills and resourcing** – assessing digital skills and competencies and making recommendations around organisational and team structures and resourcing
- **Sector experience** – working with organisations of similar breadth of offer and structural complexity as the Foundation.

We are hoping to continue this partnership for the Implementation phase (beginning September 2022) over a three-year period. We also recognise that the Discovery phase might reveal the need for additional partners for Implementation which we hope to identify together and surface in recommendations for the Implementation phase.

Context

Overview of the Lloyd's Register Foundation

Founded in 2012, Lloyd's Register Foundation is a UK charity with global reach and the sole shareholder of the Lloyd's Register Group. With a mission to protect the safety of life and property, and to advance transport and engineering education, the Foundation has an important role to play in meeting the challenges of today and the future. In addition to making the world safer

through funding research, innovation and education, we mobilise global coalitions of like-minded organisations that share our objectives, to work together for faster, greater change.

To deliver our strategy and mission, the Foundation is looking to transform its digital estate as we aspire to become the global forum for safety. As we embark on this journey, we are looking to appoint a digital partner that has the expertise, resources and creativity to undertake an initial Discovery phase with the potential to be engaged in the longer-term Implementation phase.

Why now?

So why now? The charity sector is undergoing a shift following the impact of COVID-19, with 67% of UK charities planning to invest more in digital development, infrastructure and systems. In addition to experiencing this shift, we have also recently finalised our long range plan, which outlines our plans to invest in our strategic goals up until 2027.

Future Safe Oceans
By 2026 the Foundation will be a unique voice in championing a safe, sustainable and just ocean economy. We will build a distinctive global voice through a world recognised evidence, insight and foresight programme, which in turn will be underpinned by open and shared data.

Engineering Skills for a Safe Future
With population growth driving rapid industrialisation and urbanisation, notably in Africa and SE Asia, the world needs the skills to design and safely construct, operate, maintain and critical infrastructure on an enormous scale. By 2026 we will have a distinctive global voice providing evidence and insight for safety and engineering skills needs, which in turn will drive investment by others.

Turning the World Risk Poll Into Action
Building on the first two waves of the World Risk Poll, we will undertake activities that support and drive mission-aligned impact. Global communities and individuals will be safer as a result of interventions that reduce risk and knowledge about risk perception and experience will be improved and debate will stimulate action among decision makers

Investing in our Heritage Practice

The Foundation's Heritage & Education Centre (HEC) is undergoing significant investment over the next three to five year years as it looks to tell the story of the evolution of maritime safety and its role in developing a sustainable and efficient ocean economy. In utilising its unique archive and library, the Centre is looking to engage with leading research institutions, museums and archives globally to tell this story, through grant funding, partnerships and the opening of its new public visitor centre at 71 Fenchurch Street London.

We need to invest in the transformation of our digital estate to support our journey in becoming a modern, impactful and global Foundation and to put us in a good position to achieve our long range plan.

Our audiences

One of the goals for the transformation of our digital estate is to better support, engage and influence a wide range of audiences online as well as stakeholders, partners and networks.

- **Grantholders and those looking to apply for funding** from the Foundation – currently the Foundation has 100 live grants with a commitment of £118 million to organisations from 22 countries globally
- **Thought-leaders and decision makers** that engage with our Evidence and Insights Centre to engineer a safe world, informing policy-makers and the general public about global risk and safety issues
- **Researchers and historians** that utilise the unique heritage, data and resources from the Heritage & Education Centre; putting this to work in exploring historical contexts and insights to solving contemporary safety challenges, and the impact of innovation and legislation on the development of maritime safety.
- **Networks and institutions** looking to partner or engage with the Foundation to develop key areas outlined within our strategy
- **Lloyd's Register Group colleagues and stakeholders** – in working with the Lloyd's Register Group, we maximise our benefit to society, particularly around the development and safeguarding of the ocean economy

We want to achieve growth across all these audiences as the Foundation looks to scale up its funding, evidence-gathering, recruitment and networks.

Project scope and requirements

Discovery will take place from May to July 2022. The aim of this phase is to develop a vision and strategy for the Implementation phase (Autumn 2022–25).

Project requirements

The requirements for the Discovery phase are to:

- **Develop a strategy and vision** for the transformation of the Foundation's digital estate.
    - Questions to answer: What impact could we be driving through a refreshed digital estate? Where is there opportunity for growth in our audience and stakeholder engagement? How could we achieve wider global reach? Where and how could we drive greater value through further investment and transformation of our digital estate? How can we better convey the organisation's offer to a diverse range of audiences and needs? How can we ensure our digital offer positions us as a venerable, proactive Foundation that engages with its audiences effectively?

- **Recommend the future technology infrastructure** we need to support our vision and goals so that it is resilient and scalable.
    - Questions to answer: What are the specific platform and system requirements for the future? Can these be mapped onto the existing infrastructure (as is), and what are our options in incrementally working towards the proposed new infrastructure? What are the system investment requirements to support this evolution? How might we consolidate our digital estate to make it more efficient to operate?

- **Propose a brand and user experience** for the digital estate (building on the brand rollout 2022) that better supports the various offers of the Foundation and the needs of its audiences and stakeholders.
  - Questions to answer: How can we draw from the brand rollout to evolve a new digital brand experience for the Lloyd's Register Foundation and its audiences online? How can we ensure a seamless journey between different parts of the Foundation's offer, and across different platforms? How can we ensure a brand connection with the wider Group.

- **Map and research our audience and stakeholders** to understand current needs and behaviours and to identify future audience growth and potential for deeper engagement online.
  - Questions to answer: How do we better understand the very different needs of our different audiences, stakeholders, partners and networks? Who are we currently reaching online, and who are we not? Where is there opportunity for audience growth and reach? How can we be more inclusive of the diverse needs of our global audience?

- **Develop a content strategy** that gives our audiences a clearer understanding of the offer, and more opportunities to engage by better supporting their needs at different stages of the user journey across our digital estate and on our social channels.
  - Questions to answer: How is our content (across our estate and on social media) currently serving our audiences' needs and interests? What is the content we need to be making in future to best engage with and grow those audiences online?

- **Recommend the digital skills and resourcing** that will help us drive the transformation of our digital estate.
  - Questions to answer: What are the skills and resources we need internally to drive the next phases of our transformation? What specific areas of expertise will we need from partners for the Implementation phase?

- **Benchmark against our competitors and run performance analysis** across our digital estate to set metrics for the future and to define the impact and value it delivers in support of our mission
  - Questions to answer: How does our digital offer compare with similar organisations (like the Bill and Melinda Gates Foundation and Wellcome). How can we reach the global scale of these organisations? What are our missed opportunities for creating an impactful and thought-provoking experience? How is the current digital estate performing and how and where might we improve? How will we demonstrate the impact and value of the digital estate in supporting our mission?

Scope for the transformation of the digital estate

The digital estate comprises the Foundation and Heritage & Education Centre websites, the World Risk Poll campaign site, our Flexigrant system and annual review site.

Foundation main website: **www.lrfoundation.org.uk** (EPiServer CMS) – this acts as the main platform for the Foundation, hosting information on our strategy, corporate history,

funding guidelines, publications, event information, news articles etc. This site is managed by the Strategic Communications and Global Engagement team.

- Key audiences – grant applicants, press enquiries, organisations/universities looking to partner with the Foundation
- Key metrics in 2021:
    - 43,326 users
    - 119,940 page views
    - 68.53% bounce rate
    - Average of 1.44 sessions per user. Average session length 01:29
    - Key territories – UK, USA, India, Philippines

Heritage & Education Centre: **hec.lrfoundation.org.uk** (Qi Collection and Content Management System) – the standalone site for the Heritage & Education Centre. This hosts the Centre's digitised collections and catalogues which number over 1.1 million documents and 56,000 library records. The site also holds research guides, outreach content (online exhibitions, stories, blogs etc), news articles and event information. This site is managed by the Heritage & Education Centre team.

- Key audiences – maritime historians, students/scholars
- Key metrics in 2021:
    - 66,174 users
    - 459,539 page views
    - 45.66% bounce rate
    - Average of 1.58 sessions per user. Average session length 05:03
    - Key territories - UK, USA, Australia, Canada

World Risk Poll: **wrp.lrfoundation.org.uk** (Wordpress) – The World Risk Poll is one of the Foundation's largest campaigns and concerns the first ever global study of worry and risk globally. The WRP microsite holds summaries, infographics and raw data exports. This site is managed by the Strategic Communications and Global Engagement team following direction from the Evidence and Insight Centre. The content on the site will evolve radically in 2022, 2024 and 2026 in line with the reporting of the future cycles of the Poll, and the interrelationship between findings from different waves will need to be factored in.

- Key audiences – policy makers, safety organisations, academics
- Key metrics in 2021:
    - 7,478 users
    - 24,375 page views
    - 69.08% bounce rate
    - Average of 1.88 sessions per user. Average session length 01:27
    - Key territories – UK, USA, India, Philippines

NEST platform (Network for Engineering a Safer Tomorrow): **nest.lrfoundation.org.uk** (Hivebrite) – Launched in March 2021, the NEST platform is a community-driven platform that brings together people from across the Foundation's funding portfolio to connect and support one another. This international network is in its infancy at the moment with 213 users from over 30 different organisations having been registered to the platform. Internally, there is an ambition to grow this to 500–1000 users by the end of 2022. Managed by the Strategic Communications and Global Engagement team with support from the Programmes team.

- Key audiences – grant holder network
- Key metrics:
    - 213 users from over 30 different organisations

People & Places - Annual Review: **peopleandplaces.lrfoundation.org.uk** (Wordpress) – A content, story-driven website that provides basic overviews of the diversity of the Foundation's grantholder network, and its impact in engineering a safer world on an annual basis. Managed by the Strategic Communications and Global Engagement team.

- Key audiences – journalists, potential grant applicants
- Key metrics in 2021:
    - 2,683 users
    - 7,167 page views
    - Average of 0.75 sessions per user. Average session length 00:50
    - Key territories – UK, USA, China, Netherlands

Flexigrant System: **lrfoundation.flexigrant.com** – Our funding application workflow system Flexigrant holds approved, drafted and rejected applications, contact databases, financial information and reports. This is only accessible to our grant holder network and Foundation staff. The Flexigrant system is managed by the Grants Admin team. As Flexigrant is a private workflow system, key metrics have not been provided.

- Key audience – grant holder network

Social media

While the core focus of Discovery is on the Foundation's digital estate, it's important that we think holistically across the wider offer and include a strategic look at how we use social media channels to gain further reach and engagement with the Foundation online and how we further build out our online communities.

Foundation accounts:

- Lloyd's Register Foundation - Twitter, Facebook, LinkedIn
- Heritage & Education Centre – Twitter, Facebook, Instagram

Deliverables

For the Discovery phase we expect the following deliverables:

- **Our key deliverable is a strategy** for implementation, with a clear vision, assessment of challenges and proposed way forward, including a sense of what value our future investment in digital transformation will achieve.

The strategy will be accompanied, we imagine, by other deliverables such as:

- **Technology assessment** and steer on future infrastructure
- **Proposal for digital brand experience** and top level UX approach

- **Audience mapping** and content audit
- **Content strategy** for the future
- **Recommendations for measuring and monitoring performance** of the digital estate, as well as for how our digital investment is driving value and impact for the Foundation
- **Implementation phase priorities and recommendations**, e.g., for 'quick wins' in next 6 months, and broader work packages for Implementation phase (and sequencing)
- **Recommendations for internal skills and resource gaps**, and resource and skills needs for partners involved in Implementation phase

We assume that during Discovery we will receive summary decks of the above for us to share with internal stakeholders and to help brief in future work packages.

We will want to discuss the range, form and format of the deliverables above with the appointed partner. We would like to understand in your proposal what of the above will be achievable within our timeframe for Discovery.

We do not expect any implementation during this Discovery phase.

Budget

The budget for the Discovery phase is £150,000-£250,000. We will not be shortlisting partners who don't demonstrate an understanding of the scale and ambition of the project.

We understand that our timeline is potentially challenging, and would therefore like to see in your proposal how you would approach the scope, and how this impacts on budget and programme.

We will offer a small honorarium fee of £2,000 for each of the two finalist partners that are successful in reaching the chemistry workshop stage.

For reference, the Implementation phase will involve a budget of between £1.5 and £2million over a three-year period.

Our selection criteria

We'll be reviewing proposals based on the following criteria:

- Understanding of brief – 20%
- Proposed approach (including the ability to work with our timeline) - 20%
- Demonstrable expertise across:
  - brand and UX - 10%
  - audience engagement and content strategy - 10%
  - systems and technology infrastructure - 10%
- Demonstrable and relevant experience with similar organisations and charitable institutions - 15%
- Value for money – 15%

Timings

Project timeline

The transformation project for our digital estate will take place in two phases: an initial Discovery phase, followed by an Implementation phase.

The Discovery phase takes place May–July (kick-off dependent on partner capacity, but this phase must complete by the end of July 2022).

We will be drawing from recommendations from Discovery to identify and prioritise work packages for the Implementation phase, which will commence in September 2022 and continue over a three-year period to Autumn 2025.

Selection schedule

- RFP advertised: 15 March
- Q&A session: 4 April 15:00-16:30
- Submit proposals: 7 April (by 17:00)
- Shortlisting: 8–13 April
- Finalists informed: 14 April
- Pitches (for finalists): 26 and 28 April
- Chemistry workshop (final 2): 2 May
- Appointment and contract issued: Early-mid May
- Submission of Discovery deliverables: w/c 25 July

What happens next

If you have any questions about the RFP or the wider project, please contact Sean Clemenson.

We will be holding a Q&A session with the Foundation Digital Transformation team for partners who are interested in submitting a proposal. This will be a remote session on Microsoft Teams on **Monday 4 April at 15:00-16:30**.

If you're unable to attend, we will be happy to share a recording of the Q&A session. We will also be able to share a written Q&A summary.

How to respond

Partners should submit proposals to Sean Clemenson (Head of Digital Development) no later than **17:00 Monday 7 April**. All proposals must include:

- A document covering the following areas:
    - Project approach and timeline
    - Scope of work recommendations

- o Relevant experience and expertise (as per partner specification and selection criteria)
- o Project management and communications, including what you need from Foundation teams - access, expertise etc.
- o Budget and phasing
- o Statutory financial accounts for the last two years

- A short Microsoft PowerPoint file that concisely summarises your proposal, including project approach, timeline and recommended budget