

# Commissioning/Tendering for Creative Packages

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## Definition

Typically “creative packages” would include any audio-visual work, computer-based interactive displays (including tablets and smart-phones), graphics, web-sites, some forms of live interpretation – any work where CREATIVE IDEAS, conceptual or design-based, form part of the process.

## Preface

Much of what follows is biased towards audio-visual projects, be they a simple single-screen video, or a wide-ranging mixed-media experience, incorporating lighting, sound, video, special effects, and so on.

It is, however, important to understand that, as mentioned above, the principles apply across the creative spectrum.

NOT INCLUDED here is any form of guidance on what makes and defines *effective* visitor communication. However, **it is the effectiveness of the communication that actually expresses the overarching goal of any piece of interpretative creative work.**<sup>1</sup>

Understanding this is vital.

Directly allied to this, it is very important to realise that visitors are exposed, on a daily basis, to high quality films and TV programmes about history and the natural world, art and science. These topics are those which typically define the subject matter for visitor communication in museums, historic buildings, galleries, heritage attractions and visitor centres. And visitors’ expectations are thus becoming more and more sophisticated – whether they realise it or not! – shaped by what they see on TV and Film. For smart phones, tablets and other personal mobile devices and computer-based interactives, there are a whole set of different expectations being driven by the ever expanding world of Apps and gaming – different but equally, if not more, sophisticated.

If the displays do not meet, or exceed, those expectation levels, visitors are less likely to engage with the subject matter, the memorability of facts and information will fall short of what they might otherwise have been, and the impression taken away from a visit will be less favourable than could have been achieved.

The techniques and ideas suggested by experienced creators and producers are done so, not on a whim but because they are effective means of conveying messages; your messages, to your visitors.

You will often hear creative producers talk of increasing the “production values”. This is a little hard to explain fully but the outcome is effectively aimed towards maximising the “*bangs for bucks*”! Be it different on-screen techniques, sophisticated technology or conceptual creations that improve this effectiveness, it is one reason why some companies’ work will be more expensive than others. Because they know that by putting more into it, you will get a more effective result.

The problem is, that it is very hard to measure this empirically, as there is no way of assessing how much difference there would be between one option and the other – you can only choose one – which is why **it is worth generating trust and a good working relationship with a company** and talking with them about how they see their ideas working. And these “conversations” cannot be fully debated from paperwork and visuals alone, only by face-to-face discussion.

So...

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<sup>1</sup> There are, of course, some instances where “communication” is not as vital, e.g. a video backdrop designed to create mood and atmosphere.



## Don't tender unless you have to!

It wastes time and money. More than you can ever imagine!!!

### Project Development

It makes sense to include specialist suppliers at the outset of a project. This does, by definition, mean finding a company as part of the development process.

Often tender documents are sent out in which the client team, frequently with the help of a consultant or writer for the graphics, have worked up, for example, audio-visual ideas to the  $n^{\text{th}}$  degree, almost scripting it. This is actually our job; it's our area of expertise! We will probably have ideas more suited to the AV media, ideas that maximise its effectiveness. Much better from the creative perspective would be to bring the production company in at the outset, to talk with all concerned and work up ideas together.

It actually makes sound financial sense too. Time and effort is not wasted on pitch documents and all that that entails; instead all the effort, right from the beginning, is going into the development of what is seen on screen and in the displays. This will then provide much greater value-for-money.

### Existing Relationships

If you have a good working relationship with a company and are happy with their output, then carry on using them. They will already have an understanding of you and your establishment, which can be invaluable. (See also below – “It's not a Game”.) This on-going form of relationship is thought to be all-important in advertising and marketing communications – why is interpretation any different?

Similarly, where interpretative planning has been part of the development process and this has been carried out by, or included a company who undertakes that work directly (rather than a “lead design agency” who would sub-contract), it actually makes sense to commission them for the work. They will have become familiar with the project, they will have a working relationship with you and as such (assuming you are happy with them) they are best placed to provide the service.

### Selecting Companies

If the work is a stand-alone project, or if the above is not the case, then you have to find a way of selecting a company to work with (assuming there are no companies that have worked at your establishment recently, or you are not happy with those that have). You might want a local firm, you might have seen some work elsewhere by a particular company, you might be recommended to a company by a colleague, you might look through any of the directories available from trade press and associations, e.g. the Museums Association, you might even do an internet search! However, word of mouth recommendation is often the best of these – speak to a colleague in another department or museum/property. These personal experiences are (almost always) the most valuable gauges of creativity and competence. If you do not have any connections with companies, you should ask those you select to refer you to existing or past clients for that personal recommendation.

Whatever you do - talk to the companies; look at their track-record and what they have done elsewhere: and this doesn't mean simply asking them to send a show-reel. Show-reels are valuable as proof of work and general competence but watched in isolation without personal explanation you have no way of knowing under what constraints the work was carried out – budgetary, time-scale or any other relevant criteria. You do not know what its objectives were, how it sat with any other media, or how it was used (and in any case, these days, much of this background information about a company can be gleaned from their web-site).

So invite the companies to the site, explain what you are trying to achieve and listen to what they have to say. If approached on this basis, they will normally be very happy to spend time visiting and being given the opportunity to tell you about other work and how they will go about this project.

You should not expect them to proffer creative solutions – this takes much thought, consideration and time – but they should be able to talk through the principles of how they will look at the project and how they will go about it.

Most companies will do a great job, if you let them!! So once you have had these kind of discussions, if you are happy then go ahead with them.



## Tendering

If you really have to go out to tender, use the same criteria to select no more than 3 companies to tender for the work.

### Contents & Expectations

When you send out a tender it is very hard to encompass every single eventuality, or thought, and in any case as ideas come back to you it may manifestly alter some of the original thinking – this is what IDEAS are all about. But be as comprehensive as possible in describing the package: include guidance on the level of response you are looking for, but **DO NOT** ask for fully worked up proposals – this is effectively doing the first stage of the project and is what companies get PAID to do. Do outline your objectives, your audience, your overall plan and especially any other interpretation that is not included in this particular package – e.g. you might be tendering for video and graphics separately, but in all likelihood there should be some commonality to the way they work together to enhance and maximize the effectiveness of the total visitor communication package.<sup>2</sup>

### Do not just send out a brown envelope

...or e-mail a tender without first contacting the company concerned, preferably by phone. You are expecting them to take the time to treat your project with professionalism and you should reflect that professionalism in your own approach to the tendering.

### It is not a game!

Companies have to spend a lot of time and money on tenders (and don't forget time is money), so it is only right that they should expect you to be willing to expend some effort too. Be willing to answer their questions, it is for everyone's benefit. Guide, don't hide!

### Questions

If companies come back with some questions to which the answers clarify parts of the tender, then by all means circulate these questions and answers to the other companies. If a company responds with questions relating to a creative idea they have had, **DO NOT** share the answers with the other companies. If it manifestly affects other matters, ask them to tender on the basis of the original brief but to mention the alterations they recommend as part of that response. If you like their ideas, they are the company for you!

### Do not issue a tender if you know who you want to do the job – loyalty is not a crime!

...e.g. because you already have a good working relationship. It wastes time and money both for you and all the companies involved – and delays the start of the project. If you cannot get around the tendering procedure, then be up-front with the companies you ask to respond and **pay them** a sensible amount to do just enough in their response to satisfy the bureaucratic requirements, outlining what that is. (This, of course, turns the tendering process into a farcical waste of time, but that is the point we are making!!)

#### *By way of example...*

We had a tender arrive through the post for an audio-visual contract. The documentation mentioned that the new work was to run alongside some existing "award winning" audio-visuals created the previous year. We phoned the client and asked them if they were as happy with the existing programmes as the tender suggested. They said they were. We asked if they would be using the same company as before and they rather hesitantly said that it was highly likely. We suggested that they should definitely do so and opted not to tender, for obvious reasons. They had sent the tender to 5 companies. Why? If you are happy, just use the people with whom you are happy. By the way, guess who won the job?!?!

On the other side of this same coin, we know that ideas provided by a tendering company have then been suggested by a client to an incumbent. Intellectual copyright is a minefield but there is a moral obligation, if not a clear legal one, for you to abide by, so you should not use other companies' skills to provide a rod with which to beat an existing supplier either creatively or on cost. If you are not happy with them, it's time to find someone else!

To which end, it may be that the tender is at least partly designed to keep the incumbent on their toes and check they are not taking advantage. This is unfair on 2 counts.

<sup>2</sup> Incidentally, some companies can take on more than one part of a creative brief. This can (should) guarantee that there is a level coherence to the way the various media look and feel, creating a more "connected" experience for the visitors: Often described by the phrase, "joined-up thinking". But this "joined-up thinking" can be carried out by you, although it will very much depend upon the content and scale of the project, your own experience, as well as who and how the project is being designed and managed.



First, it shows mistrust of the existing company. Secondly, it means that other parties put in a lot of time and effort on a proposal they could only possibly win if there is a major failure on the part of the incumbent. Which is unlikely, to say the least.

Either way, it is not a level playing field

### Issue the budget

This is absolutely vital<sup>3</sup>. Creative proposals are not like heating contracts! There is no formula for costing ideas in the way you can work out the size of pipe-works or required thermal output for a particular space. Nor are you buying boxes. You are buying creativity. Ideas can be achieved at many different levels and it is entirely reasonable to let professionals know how much is in the pot. Not telling them shows a complete lack of trust & transparency and, just as importantly, won't allow you to judge, or compare, like with like. It also wastes time and money, your time and money, as you may have to adjust your plans if you cannot afford what you have prescribed with the budgets that come back to you.<sup>4</sup>

If you do decide to tender on this basis (and are able to find companies willing to take part), if all the companies respond with figures over (or under) your budget – DO NOT reissue the tender. Choose the company you wish to use and then talk through the budget with them immediately. If they still wish to go ahead, commission them!! (Realising that a reduced budget is likely to result in dropping some elements altogether and at the very least will mean adjusting their proposals to suit.)

Plus, there is an old adage, “*Can you afford the lowest quote?!*” – if one company is substantially cheaper than others, there will be a reason and it may be that this will result in a less effective product for you. In addition to this, some companies will quote low to win the job and then start to add extras in as the project progresses. In contrast, others will ensure they have included enough allowances to avoid nasty surprises for you down the production process. Which company would you prefer to use? (Not to mention the “production values” alluded to above and referred to in the Preface.)

### Tendering is not a test<sup>5</sup>

It is an opportunity for you to choose a company that will provide your visitors with the most creative and effective way to get your messages across to them. So...

#### Allow a decent period of time for companies to respond

Companies have work to do too, so tendering fits in around that work. At least one full month should be a working minimum. (See also below Notes on “Thinking Time”.)

#### *By way of example...*

We were recently asked to tender for the creation of some video sequences. We received the invitation by e-mail on a Monday. The deadline for responses was that Thursday! We were in the middle of finalising a project and simply could not respond to all the requirements in time. Did they just need someone to make up the numbers? Or were they so disorganised that they could not issue the tender to provide a decent response time?

### See a company if they ask

If they are willing to invest the time you should be too. If they are the only ones who ask, they are probably the right company for the job!!

If more than one company asks for a site visit, make sure you see them individually. It's impossible for them to have open discussion in front of competitors and it's your first chance (if you have not used them

<sup>3</sup> The only time this is not the case is if you are actually looking for a completely unconstrained tender and will find appropriate funding to suit the chosen approach. i.e. **you are not simply looking for the lowest quote!** However, you should tell the tenderers this at the start of the process. They should know that they are being asked to judge from experience and the brief, the scale and scope that they feel is appropriate and you should ask them for their justifications of this as part of the tender returns. And then you must interview them. One instance we know of resulted in 3 options: one for £125k; one for £350k; one for £800k. (See also comments on “payment” at the end of this document.)

<sup>4</sup> This is another good reason for getting a company involved at the outset of a project. You can ensure that what is designed can be created with available funds, and/or that you seek the correct amount of funding in the first place.

<sup>5</sup> When the Royal Marines take on a person for commando training they recognise that they are investing time and money in that individual. Although to become a RM commando is tough, if you don't meet the grade in a particular section, or get injured, they allow you the time to repeat the process and get it done. **At no time are they trying to make you fail or catch you out;** quite the opposite is true, **they are supporting you** so you can achieve the required standard. **Tendering should be carried out with the same mindset. To get the best ideas, you should support and invest time in your tenderers,** not leave them floundering without tools they have asked for. It is you and the project that will benefit in the end.



before) for you to meet representatives and get a feel for the way they work, their style and their personalities. That chemistry between you and them is important too. You will not end up with a comfortable experience if you don't get on well and you will not be able to judge if you can get on well with a company unless you can have those discussions. And do this as early in the tender period as possible.

Remember, **the development of a creative package should be a collaborative process between client and supplier**. That collaboration must be a comfortable one to achieve the best results.

## Size of an Organisation

In the heritage sector there are very few (if any) large companies that undertake interpretative media production.

Most only have a small number of full-time employees.

### Size is not a gauge to competence or resources.

All companies contract freelance staff who specialise in a particular discipline. In fact, to a great extent the freelance market place is where the talent lies – if you are good enough, you can make it as a freelancer! As such the resources of a company are limitless, and thus it is their ability to manage the project that is the important question (alongside the creativity on offer). Thus, size or financial turnover should not be a limiting factor.

#### *By way of example...*

We were precluded from tendering for a project because our turnover for the previous year was deemed to be too small. We had a long-standing working relationship with the client, but their hands were tied by the cost consultants' terms of reference for the project in the PQQ.

Paradoxically, the lead agency on the project was one of the largest and most successful.

Half way through the project, they ceased trading!!!

Thus proving size is no guarantee of stability or resources.

Q. So, who carried on the work?

A. The freelancers who had been contracted... albeit, managed by the original project director.

## Assessing the tenders

Sometimes it is prescribed that you use a matrix scoring system. This is not a wholly bad way of looking at constituent parts of a company's response and can act as an easy reference *aide memoire* to some of their thinking. BUT the “**tick-box**” culture is not ideally suited to assessing creative ideas, as it will not allow for any of the nuances that actually make a difference within the responses. Thus it is not the only method that should be employed. There should be room for some instinct in the process, a feel for what a company is like to work with – remember...

...**a creative package is not a function, it is a subjective development**, and you will be part of that and need to know you can work with the people involved.

### Interviews

For any reasonably sized tender (say in excess of £10k) you must, must, must meet up with the companies after they have sent their responses to allow them to explain in more detail how they will go about the project both creatively and administratively. Even if you met them before the submission. This is by far and way the most effective way for you to judge who you want to work with. (Ideally you should do so for all tenders, large or small.)

But **DO NOT make this into another “level” of tendering**. You should not be asking for additional work, such as a PowerPoint presentation, or similar – if they choose to do so that is fine, but it is simply their opportunity to talk through the proposals.

### Documentation

Accounts and insurance, environmental policies, etc., are all very well but from a creative standpoint they are secondary and offer no guarantee of stability – see notes above on “Size of an Organisation”<sup>6</sup>.

<sup>6</sup> Furthermore, as far as we know, in the example cited above, no recourse to insurances or litigation took place, nor did it need to.



## A Real Experience

Below is a real example of what goes on and how you can waste time and money to make uninformed decisions.

Tender for new Heritage Attraction at an historic property.

Description	Comment	Good	Bad
3 companies asked to pitch.	This is OK. No more than 3 though.		
Quite well described content of package. They are looking to the companies tendering to expand upon this and provide an indication of creative approach.	This is OK too, but it will mean that the tenderers need to spend time researching the subject a little, to provide some understanding that can inform the creative thinking.		
Client will not issue Budget.	Extremely bad practice. In most cases we would say we would not wish to tender on this basis. A deal breaker.		
4 weeks provided for responses.	This is OK but...		
We asked for a site visit and were told that this might not be possible until after the tenders had been received.	Not good again – if we want to invest the time on your behalf, you should do so too.		
A week later we were then told that a site visit was possible...	Obviously the other companies had asked too.		
...But that we would be visiting at the same time as the other companies – our competitors (and also 3 further companies tendering for other aspects/contracts within the project*).	Really bad – it's laziness not to spend time with each company and also means that you will not gain as much from their visit and nor will they. Almost a waste of everybody's time, but not quite. Nearly a deal breaker, again.		
The date was fixed for another week hence.	In addition to this, the whole point of the site visit is to orientate ourselves with the layout, the scale and ambience of the location, and to discuss how the client feels about the project. In doing it half-way through the tendering period, it actually reduces severely the amount of time to respond, as it can critically alter one's approach.		
Deadline for responses then brought forward because the Trustees had a meeting they wished to use to discuss the tenders.	This meeting date must have been known about at the start, so the deadline should have always reflected it. Disorganised and unprofessional. (Or is the client just seeing how companies respond to "pressure"? If so an unnecessary "game"!)		
One Tenderer drops out - They decided that without a budget to work to and with the seeming lack of organisation, they would prefer to not be involved.	Not good news for the client - do they now have to seek another company to fill the gap? (Isn't 3 the minimum HLF requirement?) In which case does the deadline then extend for all parties? (Plus, what does it tell them about the manner in which they have gone about the tendering?)		
Asked to attend an interview: Selected members of the team to go to talk through the ideas, approach and budget.	This is good. It allows us to explain our thinking.		
Told that at Interview we should show examples of previous work.	This is half and half OK. If you have chosen a company carefully you should already be happy that they will be able to do the job. But it does mean we can show appropriate examples.		
<b>Tenders sent</b>			
No Interview now to take place. Company chosen solely on lowest quote. Less than 24 hours after Tender Deadline – how could the client have possibly understood and taken in at least 2 (and possibly 5*) x 35+ page documents without any questions? They made the decision on the bottom line! They actually cited that HLF would insist on the lowest quote – a blatant brush-off!! And not true.	Utterly ridiculous. You cannot assess value-for-money from paperwork alone. You need to talk to the people who will be doing the job, understand and expand upon their written text and visuals. Also to further investigate why for given items one company had significantly different costs from the other. Was one being cautious to compensate for all eventualities? Was another operating on the 'Ryanair' business model? Plus, they have taken the time to prepare a lot of work, the least you owe them is a chance to explain it in person.		



### **Time spent to provide the above tender** (who do you think pays for this?)

Creative Producer – 10+ days

Including 1 site visit; 3 production team meetings; thinking time and writing time; **interview**

Project Manager – 5 days

Including 1 site visit; 3 production team meetings; budgeting; **interview**

Script Writer – 4 days

Including 1 site visit; 1 production team meeting; thinking time and writing time; **interview**

Line Producer – 3 days

1 Production team meeting; thinking time and direction of illustrations

Illustrator – 2 days

Creating 3D visuals of ideas

Audio Consultant – 1 day

1 production team meeting and writing of recommendations

Plus out of pocket expenses such as mileage/train fares, etc.

At commercial rates, all in all probably in excess of £12,000.00 worth of time!!!!

Remember - All this for a job for which we had no idea what the budget was, but required this kind of response to fulfill the brief, as set out in the tender documents.

### **In Consequence**

First, if the job is won, that £12,000.00 will be knocked off the production values available for the project – it has to be paid for somehow!

Secondly, the irony is that most commissioners are looking for a stable company with a good turnover, while the whole tendering process actively conspires against this. If a company wins say one tender in three, and if we use the above as a typical example, some 50 person-days (AT LEAST £15k - £20k, worth of time) are wasted. If one has a bad run and spends a large part of the year on fruitless tenders, then turnover is minimal and the company may collapse – many have and it's not because they weren't any good at the job! In fact the whole process relies to a large extent on the aforementioned freelancers, who are expected to spend considerable time on free pitches, with the slight possibility they may recoup part of this if, and only if, the job is won. OR the company concerned pays the freelancers for their time, placing even further financial strain on its own resources.

So...

### **Payment for Tendering**

**Pay for it.** Professional time costs money.

There is a very good argument that all tenders requiring creative input should be paid for!

Tendering takes a lot of time and effort. If you need companies to tender (and more than 3 is unnecessary) allow 3%-5%+ of the total contract budget per company. Although this will not cover all the costs incurred, it is a gesture in the right direction and shows commitment on your part to get the best possible responses.

### **Unspecified Budget**

**This is particularly true for those instances where the budget has not been issued** because you want to give companies a completely free hand with their ideas. In this situation, you should arrange beforehand how much you will pay them for the ideas and ask them to work up slightly more detailed proposals, so that you have a very good idea of what they are suggesting and what costs what. **And you must interview them.** It will be impossible to judge from paperwork alone.



## Notes

### Thinking Time – This is really important!!!

We mention in the above breakdown of time spent on a tender an item we have called, “Thinking Time”. This might sound a little ethereal – and it is!

Ideas do not just magically appear, even those that are not fully developed. One needs to spend time thinking, discussing with colleagues, mulling over thoughts and information before any fingers hit the keyboards. This is true after the tenders too. **Creative ideas take time.**

### Project Development – notes on Objectives

There is nothing in the above that suggests how you should actually develop your project. This is fundamental to the commissioning and tendering process too.

In brief, one of the most basic constituents should be your project’s objectives – these will have (or should have) a major influence on the creative ideas and thus what form the most effective communication package should take.

Very simplistically, those objectives can be split into 2 types:

**The style of interpretation** you wish to give your visitors... is it artistic or academic; presentational or experiential? Or?

**The outcomes required**... increase in number of visitors; generate more interest in one particular topic. Or?

### Combining with hardware package

The types of hardware companies vary from those who buy everything in, and those that manufacture some of the equipment themselves. Neither is right or wrong. But the hardware should be specified to meet the creative requirements, so it is simply wrong to start with the hardware.

It could be argued that the 2 packages should in fact be only one and that the production company should be left to specify its hardware supplier and attendant equipment specification to meet exactly the needs of the creative plan. While this makes for a larger package in terms of the budget, it has the benefit that everything is controlled in the right way from the start. There is nothing stopping the production company tendering the hardware package if that course of action has to be followed, nor for it to be separated out once its specifications have been detailed.

The main point is – DO NOT START WITH THE TECHNOLOGY and be prepared for the creative proposals to change any initial hardware specification. At the very least, involve the creative team in the hardware selection/specification process.<sup>7</sup>

That said, clearly if the project is relatively small and simple, let’s say it is just a single video to be screened as an introductory film on a monitor for a small group of visitors, then it is not too difficult to establish the spec.

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<sup>7</sup> In the event of you wishing to re-use hardware from previous projects, you should make this a criterion from the start of discussions and specify exactly what that hardware is. More importantly, be aware that it may have a limiting factor on the creativity that can be achieved.