

Request for proposal

Provision of a Visitor Engagement and Brand Perception Study

Open date: Friday 19 April 2024

Closing date: Friday 10 May 2024

Authors

This consultant brief was prepared by officers of the National Trust of Western Australia

Document control

| VERSION | ISSUED |
|------------------|---------------|
| Draft – internal | 9/1/2024 |
| Draft – internal | 28/3/2024 |
| Draft – internal | 18/4/2024 |
| Final | 19/04/2024 |

Apart from any fair dealing for the purposes of private study or research, as permitted under the Copyright Act, no part of the information in this report may be stored in a retrieval system, reproduced, or transmitted in any form or by any means without the permission of the National Trust of Western Australia.

Contents

| | |
|---|---|
| Introduction | 3 |
| Background | 3 |
| Contract summary | 5 |
| Project scope..... | 5 |
| Situation analysis | 6 |
| Project objectives..... | 6 |
| Consultation selection criteria | 7 |
| Insurance requirements..... | 8 |
| Project budget..... | 8 |
| Project / milestone timings..... | 8 |
| Copyright and confidentiality..... | 8 |
| Form of contract | 8 |
| Information Required for Lodging Submissions..... | 8 |
| Submissions..... | 9 |
| Project Manager..... | 9 |

Introduction

Conserving and promoting the stories of place is at the heart of our purpose. Stories connect West Australians with their heritage. Understanding our cultural landscapes and conserving places, customs and values from the past contributes to the continuity of our culture. By awakening people to the value of heritage the National Trust aims to enhance people's understanding of why heritage is important, how it enables us to explore our identity and our place in the world, and how an understanding of the value of heritage contributes to a sense of well-being in society. This is done by continuing to conserve the places in our care; by educating people about the value of heritage; by raising awareness of the vital role heritage plays in our society; by engaging the community; by making places accessible; by finding new and compatible uses for its properties; and by encouraging participation in heritage-based experiences.

Background

The National Trust of Western Australia (NTWA) aspires to awaken the community to the value of heritage. NTWA is a statutory authority that works under an Act of Parliament, and is also recognised as a not for profit, community-based organisation, and a registered charity. It works both for Government and for the community.

In partnership with the community and Government, NTWA promotes awareness and understanding, encourages participation, actively champions protection, and leverages the economic and social value of Western Australia's heritage.

The National Trust was founded in 1959 and constituted as a Statutory Authority under the National Trust of Australia (WA) Act 1964. The Act provides for a Council to administer the National Trust.

NTWA manages the tangible and intangible values of a portfolio of significant heritage places and collections. To conserve, interpret and make these accessible requires a commitment to best practice heritage management including conservation, interpretation, activation, and community engagement. Engagement is driven through a range of narratives and interpretive techniques underpinned by knowledge, research, and analysis. Storytelling and interpretation are key to ensure a visitor experience that is experiential, memorable, and provocative.

NTWA plans to increase community engagement with heritage by further developing the visitor experience through telling compelling and engaging stories that connect with personal experiences. We believe there is a desire to build an understanding of the value of heritage in society, which will make heritage experiences more relevant and appealing. In turn, this will lead to more in the community having greater recognition of the value of our work. An increase in visibility and recognition will lead to an increase in support from members, donors, government and the corporate and broader community, which will diversify and increase revenue, and so enable greater investment in assets. This support will make our places to visit more appealing to more stakeholders and so increase community engagement with heritage.

The National Trust cares for around 64 places, comprising over 200 buildings, from the Geraldton Heritage Precinct in the north to the Israelite Bay Telegraph Station in the southeast including the heritage values of the Goldfields Water Supply Scheme from Mundaring to Kalgoorlie and a diverse collection of places in between.

24 places are open to the public offering a heritage experience: including Strawberry Hill at Barmup in Albany, Woodbridge at Mandoon in Guildford, Peninsula Farm at Wu-rut Woorat in Maylands, East Perth Cemeteries, Ellensbrook at Mokidup in Margaret River, Samson House in Fremantle, Old Blythewood in Pinjarra, Greenough, Wonnerup in Busselton, Avondale Farm in Beverley, and Karalee Rocks in the wheat belt.

14 places are leased for which there is a commercial return such as 57 Murray Street and Old Boys School in Perth, Wanslea in Cottesloe, the former North Fremantle Primary School, and the former Victoria Hospital complex in Geraldton, known now as the Geraldton Heritage Precinct. 15 places are under residential lease and 9 are under a cost neutral lease. 17 places are vacant - in a ruined or semi ruined state such as the wonderful collection of places on the historic Greenough Flats. Gallop House, in Dalkeith is home to a Composer in Residence as a part of our community engagement program. Visitors can stay in former Prime Minister John Curtin's house in Cottesloe as well as cottages at Avondale Farm in Beverley. There are also some 60,000 hectares of bushland protected under covenant across 187 places.

NTWA has contributed to Aboriginal heritage by providing a means for communities to become sustainable through foundations established in partnership with resource companies and Aboriginal Corporations, through language reclamation delivered in the Goldfields, through a cultural knowledge repatriation program transferring cultural knowledge collected by resource companies over the last 40 years to their rightful custodians, through dual naming of NTWA places to visit and through truth telling and reconciliation activities at places to visit.

NTWA manages a membership of nearly 2,000 members, and a donor and bequest program. We manage a tax-deductible appeal program for people wishing to contribute to the conservation of places. The National Trust provides advice to all levels of government and the broad community on heritage issues.

NTWA also runs a large education program that can see up to 10,000 students in a year participate in curriculum aligned programs at places such as East Perth Cemeteries, Woodbridge in Guildford, Samson House in Fremantle, and Peninsula Farm in Maylands.

NTWA has a collection of some 20,000 artefacts – some of which are provenanced to a place and there is continuous work underway that goes hand in hand with conservation, interpretation, collections management and cultural landscape management.

The Australian Heritage Festival is the largest public program under the community engagement program, and sees over 40,000 people participate in a range of heritage activities across the State. Lectures, talks, official services, community events, concerts, tours are also scheduled across the public program of events.

The strategic plan aims that the National Trust will be recognised as a principal voice in heritage, to evolve compelling and immersive heritage experiences, and to grow support.

Specifically, NTWA aims to:

- Increase community engagement overall, within the target audience and wider WA community.
- Promote the breadth and benefits of our services offered by National Trust, through the specified programs.
- Position the brand and the places to visit within the heritage tourism sector.
- Improve the visitor experience at places offering a heritage experience.

- Grow membership through acquisition and retention plus increase engagement with our members.
- Grow the volunteer network and increase engagement with volunteers.
- Position the organisation as strong advocates for the heritage cause and leaders in the heritage sector and encourage members and stakeholders to stand alongside us.

Contract summary

We aim to achieve three outcomes derived from a brand perception study:

- To understand the impact of NTWA marketing campaigns on brand perception.
- Resolve the gap between the brand qualities NTWA portrays and how the member/visitor actually feels.
- Identify areas for improvement based on member/visitor perceptions.

The brand perception study will collect, interpret, and make recommendations from current perceptions of NTWA's members, NTWA volunteers, the WA general public, engaged community and stakeholders as a not-for-profit charitable organisation offering heritage experiences through places open to visit.

The project will provide current market intelligence on the perceptions of NTWA, deliver a framework and structure for NTWA to continue to collect and track trends, sentiment, and feedback, and monitor the effectiveness of marketing, promotion, education activity from the data collected.

Project scope

This project will deliver research which informs NTWA's strategic and operational activities aimed at increasing community engagement through membership, volunteering, and visitation to NTWA places and identifying stakeholder perceptions toward community engagement.

The findings will inform marketing and promotion strategies implemented to grow the membership program, the volunteer network and increase the number of visitors at our places to visit. It will provide guidance in developing the National Trust brand and will position the organisation's cause and breadth of activity into a wider, larger market.

The scope of the contract for conducting a brand perception study for NTWA is:

- Define key audiences for National Trust in regard to the membership program, volunteer network and the community engagement program.
- Develop a framework to facilitate a brand perception study.
- Develop and conduct the necessary surveying with identified metrics.
- Collate and interpret the data collected.
- Provide and present a comprehensive report to NTWA.
- Provide the necessary survey tools for NTWA to continue tracking sentiment, perceptions, and opinions.

The services conducted to achieve the project objectives include consideration of a methodological approach where conducting a brand awareness and perception survey is via desktop, quantitative

and qualitative research methods. NTWA will be provided the opportunity to provide input to the development of the survey questionnaires.

Situation analysis

Perceptions that we currently understand based on our observations and through anecdotal feedback, categorised via NTWA program delivery are:

Community engagement

- Minimal unprompted brand awareness amongst the wider WA community.
- Perception of being an attraction or product for ageing target audience.
- No or little awareness of breadth of experiences on offer in regard to education program, events, experiences at places.
- Attracting support and forging relationships and engagement is low in regard to donations and fundraising for the cause.
- Perception of low levels of technology integration and innovation.

Visitor experience

- Condition of places to visit is poor.
- Lack of accessibility at places to visit.
- Expectations not being met in regard to experiences offered at places to visit.
- High barriers to entry into the tourism sector – standards, infrastructure, promotional platforms.
- Little perception of accessibility constraints due to fragility of heritage places and structures.

Membership

- Little understanding of value of membership package.

Volunteering

- Perceived lack of knowledge toward organisational strategic plans for specific places to visit.
- Perceived lack of flexibility in roles and tasks offered to volunteers.
- Perception that volunteers are not receptive to adopting new storytelling techniques and that they have limited experience in delivering a contemporary visitor experience.
- Perception of inappropriate use of time on site either through lack of people visiting or not enough time to conduct list of tasks.

Project objectives

The broad objective of the brand perception study is to explore and capture the current perceptions of NTWA stakeholders with an appropriate methodology that deliver useful outcomes. The research will enable NTWA to interpret perceptions as well as to identify appropriate interventions that can enhance the existing perceptions.

The specific objectives are to:

- Assess the community and target audience's understanding of our role and the heritage cause.
- Assess the target audience's perception of the NTWA brand and reasons that inform their position.

- Understand the target audience's perception of the services delivered through the specific programs.
- Probe the key challenges that need to be addressed in order to lift the profile and salience of the NTWA brand.
- Define the competitive setting and to help understand how to position the brand within the sector.
- Identify key touch points to help in promotion and development of community engagement strategies.

The types of perception studies to be considered are:

- Brand perception to understand how stakeholders perceive the NTWA brand through delivery of each of the programs mentioned above.
- Visitor perception to understand what they think about the heritage product and visitor experience at a place to visit and also about the organisation.
- Product perception regarding members and their visitation to our place's heritage significance.
- Member perception to understand why they have engaged with the organisation as a member and their perception of a NTWA membership and its associated value/worth.
- Culture perception to understand the perceptions of our stakeholders such as members and volunteers about the culture of NTWA and the heritage and cultural tourism sector of Western Australia.

The metrics will measure NTWA performance in brand awareness, recall, preference, satisfaction, and loyalty.

The project outcomes will inform NTWA on how the brand compares with competitors in the heritage tourism and attraction sector and how the brand perception is currently aligning with brand identity.

The research will also provide insight into the motivators for each target audience.

Consultation selection criteria

Priority for selection of the consultants for this project will be given to those who demonstrate considerable experience and a strong track record in consumer research, market segmentation, satisfaction survey methodology and in providing actionable research findings.

Submissions should demonstrate the applicant's experience in the development, design, and implementation of projects of this nature. A methodology for carrying out this project including general concepts as to how it may best be achieved is to be included. Allowances made for each major cost item and sub-consultancy, including travel and disbursements, should be clearly itemised.

Submissions must be limited to 10 pages in PDF format and will be evaluated against the following criteria:

- Demonstrated relevant experience including credentials and expertise of key personnel on project team 50%.
- Understanding of the tasks and outcomes, response to the brief and proposed approach to the project 50%.

Insurance requirements

The consultant is expected to hold Professional Indemnity Insurance to the value of \$5 million and Public Liability Insurance to the value of \$2 million.

Project budget

This project is to be undertaken for a fee of maximum \$40,000 + gst which includes all costs and disbursements. Invoicing will be according to the achievement of the agreed milestones. Hourly rates will be applicable for agreed additional work that is outside the project scope if required.

Project / milestone timings

This project will commence as soon as possible on appointment. It is expected the project will be completed by 23 August 2024.

| Milestone | Payment | End |
|---|------------------|----------------|
| Completion of project set up. Submission of project framework. | 50% of total fee | 24 May 2024 |
| Completion of surveying and data collection. Submission of draft report. | 50% of total fee | 28 June 2024 |
| Submission of comprehensive report and presentation. Submission of survey tools | | 23 August 2024 |

Copyright and confidentiality

Copyright of all original material prepared during this project will be assigned by the consultant team to the National Trust of Western Australia for use in connection with its operations. Use of already copyrighted material must be appropriately obtained and acknowledged. The final outputs will be considered confidential and may therefore not be distributed or shared without prior written consent from the National Trust of Western Australia.

Form of contract

The National Trust of Western Australia short form contract for consultancy/contract services.

Information Required for Lodging Submissions

The following details must also be included within the submission:

- Name of the lead consultant and sub-consultants, business address and relevant contact details.
- Details of services offered.
- Itemised fee including travel and other disbursements.

- Details addressing the selection criteria.
- Hourly rates for any additional works outside the agreed scope.
- Names and contact details of three referees who have had recent dealings with the company.
- Level of insurance(s) and name of the company that holds the policy.

Submissions

All submissions should be clearly marked 'NTWA Brand Perception Study Request for Proposal' and submitted no later than 5pm AWST Friday 10 May 2024 via:

Email: trust@ntwa.com.au or

Post/Delivery to:

National Trust of Western Australia
4 Havelock Street
WEST PERTH WA 6000

Proposals received by the nominated closing date and time will be accepted provided they are completed, signed, legible and include all necessary information required to be submitted as part of the proposal.

Project Manager

Ms Elissa Cuss
Senior Manager Marketing and Community Engagement
National Trust of Western Australia
Telephone: (08) 9321 6088 or 0417 777 490
Email: elissa.cuss@ntwa.com.au