



Westcountry Rivers Trust

Invitation to Tender: Brand & New Website Development for Fundraising Readiness

This document is confidential and should be treated as such.

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1. Project Officer

For all enquiries and submissions concerning this Invitation to Tender, please contact:

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All enquiries for further information will be answered to all parties.

2. Introduction & Overview

A. Client

Westcountry Rivers Trust

B. Introduction

Westcountry Rivers Trust has a strategic ambition to become a well-known household name across the West Country, inspiring people and organisations to:

- Become more aware of and care about the issues facing our rivers
- Be inspired to take action for our rivers, including donating.

The development of our brand and a new website need to be key drivers in making this a reality. Both must focus on engaging and inspiring, captivating our audience and compelling them to act, for example, by pledging, volunteering or donating.

An increase in giving to WRT is a key driver for this development, allowing for our communication/education work to become financially sustainable and providing additional funding to support river protection and conservation.

C. Charity Background

Westcountry Rivers Trust (WRT) is an environmental charity (Charity No. 1135007, Company No. 06545646) established in 1994 to protect and conserve our West Country rivers and advance the education of the public in the management of water and associated habitats. WRT is a member of the wider Rivers Trust network, representing over 60 member trusts across the UK.

D. Project Background

Brand & Audience Intelligence

Whilst WRT has some elements of a strong brand (logo, colourway) we do not have a wider visual brand (images etc) or considered tone of voice/copy. In late July a 2-day workshop is taking place to progress internal conversations around

purpose, mission and leading with emotion/stories. Output from this workshop will be provided to aid brand development.

As part of this contract we wish to understand more about our existing volunteer audience and potential audience of a similar demographic who do not currently support WRT.

Tenders should outline your approach to this, allowing us to better understand how our target audience feel about rivers/WRT and why they may wish to support us. Key output to include the provision of some key personas.

We wish to utilise the information garnered from the 2-day workshop and audience intelligence piece to inform our brand development, moving towards a more emotive position that engages and inspires.

We are looking for external support with this brand development, including a strapline, voice/copy, and wider visual identity.

Website

The current website has evolved over time and more recently has had little maintenance or management. Historically, WRT have been project funder led, with less need to engage with the wider public, either in terms of support or philanthropic funding. **A new website needs to capture and engage a new audience, communicate our message and drive people to act.**

We currently own the URL www.wrt.org.uk which we would like to keep. We are open to moving to a new platform, internal ease of use (both technical and content) is important.

This is a strategic rebuild of wrt.org.uk, designed to support a shift toward public fundraising, individual giving, corporate partnership and legacy giving, alongside WRT's continued programme, education and citizen science work. It will use our newly expanded visual identity and voice/copy.

The finished site must be live and fully operational by April 2027, including a testing, UX and internal training period.

3. Scope of the Service

A. Vision & Objectives

Audience Intelligence Research

To design and deliver a research piece, providing an audience perspective to aid the brand development work.

To better understand the reasons and motivations for why our current and potential donors/volunteers within the primary audience choose to support/don't support WRT.

To use a quantitative and qualitative approach to discuss personal values and beliefs, emotions around rivers, triggers for them deciding to support, barriers to further support and things they love and don't love about WRT.

WRT are able to help with distributing information/questionnaires to existing volunteer supporters and identifying current supporters for more qualitative research.

Brand Development

To review and further develop WRT's visual identity, including imagery to provide a consistent feel for the organisational brand.

To formalise a strapline and tone of voice/standard copy for WRT that leans into the emotive space to connect with people and inspire them to take action.

Website redesign

To rebuild the WRT website / develop a new WRT website

Whilst the final scope and needs of the website should be reviewed in a discovery phase the new site should:

- Increase public awareness of the plight of the west country rivers and how their support can help to make a difference / change.
- Inform and Inspire visitors, leading to action: personal pledge, donating, newsletter sign up, volunteering, event attendance etc.
- Position WRT as a credible, professional, science-led organisation in terms of its operational delivery for rivers – an expert in the field.
- Put the supporter engagement and journey at the heart of the website navigation, rather than leading with what WRT do and our internal projects.
- Reflect a clearer, more consistent brand. Considering the design around <https://fishpassapp.co.uk/> (WRT owned) and need for any brand alignment.
- Deliver against essential current project funder and operational team needs, discovered in initial stages. - As a minimum provide a list of

current/past projects and associated scientific reports, with the aim of informing AI.

- Deliver against commercial/consultancy service needs, discovered in initial stages – delivered via Westcountry Rivers Ltd.

B. Target Audience & User Journeys

Primary audience: members of the public, with a likely donor profile skewing toward older (65+), South West based, financially comfortable audiences. This has been based on general giving trends to charities from across the UK. A current piece of work on audience insight will help to inform this further.

Other audiences include those with a personal interest in the river (anglers, wild swimmers, kayakers), local communities, businesses, funders and partners, professional collaborators, media, and prospective employees and contractors.

Key user journeys - the site must support:

- Donating, as a one-off gift or a regular gift, via Beacon CRM forms
- Subscribing to news and updates
- Registering for events
- Applying to volunteer, including Citizen Science programmes
- Finding job vacancies and tender/contractor opportunities
- Finding and referencing WRT's historic reports, publications and legacy projects to demonstrate credibility to future funders and investors.

C. Website Requirements

The rebuilt site must :

- Be adaptable and flexible – remain relevant over time
- Highlight our fundraising/engagement campaigns
- Engage and Inspire
- Offer clear pathways to take action
- Demonstrate prominent call to action, attracting donations and other forms of giving.
- Consider inclusivity and accessibility - all text and fonts to be legible, palette is colour-blind friendly, uses inclusive imagery.
- Consider environmental impact of functionality, plugins and hosting. As a benchmark, proposals should state an expected rating on a recognised tool such as the Website Carbon Calculator, and how this will be tested and reported at launch.

D. Functionality

Initial functionality needs are listed below. To be reviewed and updated during scoping phase of website development.

- A clear donation pathway, utilising Beacon CRM donation forms as the giving mechanism with the option to donate as a one-off or regularly), seamlessly embedded within the site. No donor card or payment details are to be captured, processed or stored on the website at any point, in line

with PCI DSS requirements; all payment handling must sit directly with Beacon CRM.

- Responsive design throughout.
- Ability to embed videos
- Buttons for download (options to add links to documents and external links)
- UX that suggests related content to keep users on the site and offer them a journey
- Embed newsletter signup via Beacon CRM form.
- Contact form linked to Beacon CRM.
- Impact infographics.
- Specialist donation appeals.
- Ability to sign up as a volunteer via a link (currently via Assemble)
- Ability to promote our consultancy services
- Ability to embed interactive maps and storymaps via **ArcGIS**, for river/catchment information and project storytelling.
- Event listings and ability to sign up (possibly using external platform if needed)
- Functionality covering both job vacancies and consultancy/contractor tender opportunities, (job vacancies connected to WRT's Breathe HR platform for job vacancy listings. Breathe HR does not provide its own careers page, so proposals should set out how vacancies would be surfaced on the WRT site - for example, linking to or embedding Breathe's hosted listings), and how any application data is handled in line with GDPR
- Strong mobile responsiveness and accessibility to at least WCAG 2.1 AA
- Consistent, visible linking to WRT's Privacy Notice, Cookies Policy, charity registration and fundraising regulation information
- Integration with Google Analytics for tracking and reporting, and an SEO-friendly structure with easy-to-edit metadata, so performance can be monitored and improved over time.
- Content and metadata structured to be easily read and indexed by AI-powered search tools, in addition to standard SEO. Proposals should also set out their approach to, or compatibility with possible future AI chatbot integration on the site.

Standard Functionality

- Mobile-responsive design.
- Cookies bar to meet legislation.
- Easy to use CMS.
- Cross-browser support.
- SEO plugins.
- Good search function.
- GDPR/PECR and Cookie compliance.
- Social media integration.
- Connected to Google Analytics.

- Fast loading time.

E. Platform, Hosting & Content Management

WRT currently uses WordPress, hosted with Unlimited, with DNS management and security handled via Cloudflare. WRT is open to alternative platforms and hosting providers and has a preference for a content management system that is intuitive for a small internal team to manage without ongoing developer support. Proposals should recommend a platform and hosting approach and justify the recommendation against WRT's need for straightforward in-house content management, reasonable running costs, and the functional requirements above. Proposals should also confirm how DNS and security management via Cloudflare would continue, or be migrated, under the recommended approach.

F. Content & Migration

The successful supplier will need to migrate and rationalise existing content from wrt.org.uk, restructuring navigation around audience needs rather than the current project-led structure. This includes:

- Folding in content from a small number of legacy WRT project sites (tbc), ([Cornwall Rivers Project/Somerset SPONGE | Soaking up surface water](#)) into the main site, rather than leaving them as standalone domains
- Carrying over WRT's historic reports and publications in full, with a clear, accessible archive rather than a reduced or summarised set.
- The current site uses Google Analytics 4 (Measurement ID G-438YB0TNH3), managed via the MonsterInsights plugin. WRT is seeking to confirm ownership and access to this account; if it cannot be recovered before the project starts, the successful supplier should set up a new GA4 property as part of the build
- WRT's email service must remain unaffected by any change of hosting provider. Proposals should confirm how domain (DNS) records, including those currently managed via Cloudflare, and email delivery will be protected and tested during any migration, so there is no disruption to WRT's inbound or outbound email, and how DNS and domain management can be handed over to WRT's internal team without ongoing reliance on the supplier.
- Content strategy and copywriting support should be clearly costed as part of the proposal, alongside photography or multimedia needs.

G. Aftercare, Maintenance & Handover

A key requirement of this project is that WRT can manage the site independently after a handover period, without depending on the supplier for routine content updates. Proposals should include:

- A defined handover and training period
- Recommendations for ongoing technical maintenance and support (for example, security updates and backups), and whether this should sit in-house, with the platform provider, or via a support retainer

- Costed options for ongoing support beyond the handover period, clearly separated from the core build cost
- A specific, itemised cost for staff training as part of handover, distinct from ongoing technical maintenance and support, so WRT can assess whether training investment is sufficient to reduce reliance on paid developer call-outs post-launch.

H. Timescale

The tender process and delivery are anticipated to follow the timeline below.

Date	Action
20th July 2026	Invitation to Tender released to invited suppliers
31st th July 2026	Deadline for suppliers to submit queries
7th Aug 2026	All queries addressed and circulated to all applicants
14 th Aug 2026	ITT deadline: proposals due
7 th September 2026	Notification of intent to award
1 st October 2026	Contract start / project kick-off
1 st April 2027	Contract completion: site live and fully operational

4. ITT Responses

A. Respondent Guidelines

You are required to submit a written proposal, electronically, to the Project Officer by the deadline above. All proposals should include:

- Details of company experience with UK charities or similar not-for-profit organisations, ideally including fundraising-focused website work
- Relevant case studies, testimonials with charity clients preferred
- Examples of design approach or previous design work
- A proposed methodology and timeline for this project
- A recommended platform and hosting approach, with justification
- Your approach to key integrations: Beacon CRM donation forms, ArcGIS maps Breathe HR vacancy listings, and Google Analytics
- Your approach to complying with UK GDPR, PECR and WCAG 2.1 AA requirements, including your approach to data security and cyber resilience (for example, relevant certifications such as Cyber Essentials, and how supporter and donor data will be protected)
- Confirmation of your approach to PCI DSS compliance for online donations, including confirmation that no donor card or payment details will be captured, processed or stored on the website at any point, with all payment processing handled directly via Beacon CRM
- Your proposed data retention and deletion approach for audience intelligence research data, and for any WRT or supporter data you hold following handover, including confirmation of deletion or return of this data at the end of any support arrangement

- Your approach listing our previous/current project and scientific reports to inform AI to migrating and folding in legacy sites and the historic reports archive
- A clearly itemised, phased cost breakdown, structured so WRT can see what is driving cost, working within a guide budget of circa **£25,000** for the full package (audience intelligence, brand development, platform, content migration, design implementation, any photography and options for UX/AB testing). Proposals above this figure will still be considered if they set out a clear case for the additional value.

- Given the guide budget, WRT recognises that not all elements may be deliverable in full. If trade-offs are needed, please prioritise in this order:
 - a fully functional website with donation, CRM and core integrations working correctly;
 - a strapline and tone of voice suppliers can apply consistently;
 - a lighter-touch audience intelligence exercise (e.g. survey plus a small number of interviews, rather than a full-scale study); with visual identity development, photography and UX/AB testing treated as optional extras to be costed separately and added if budget allows
- Options and costs for aftercare, maintenance and ongoing support following handover
- Details of staff who would deliver the work, including relevant experience
- Current insurance certificates: Employer's Liability, Professional Indemnity and Public Liability
- Confirmation of a named project manager on the supplier side for the duration of the build, responsible for maintaining the agreed timeline, along with an outline of how competing workloads or resourcing changes on the supplier's side will be managed so as not to affect delivery against the timescale in this ITT.
- A completed draft NEC4 Professional Services Short Contract, which will be supplied alongside this ITT, as per WRT's standard practice for commissions of this kind
- Proposals should be submitted as a single PDF document, no longer than 15 pages (excluding appendices such as case studies, CVs and insurance certificates), using a minimum 11pt font

Any assumptions used in preparing your response should be clearly stated.

B. Tender Assessment: Evaluation and Process

Proposals will be assessed on price (40%) and quality (60%). Quality will be assessed on: ability to meet requirements (20%), design and creative approach (20%), delivery and timescale (10%), and staffing and relevant experience (10%).

As part of this, WRT will also consider: relevant experience with charities or similar organisations, understanding of WRT's work and fundraising ambitions, and a track record of enabling clients to manage their own websites after handover, and each supplier's approach to data security, cyber resilience and compliance with UK GDPR, PECR and WCAG requirements.

All operations must strictly comply with relevant legal requirements and best-practice standards, including UK GDPR, PECR and WCAG accessibility guidance.

Subject to timescales, WRT may invite a small number of shortlisted suppliers to a short presentation or call as part of the evaluation, ahead of final notification of

intent to award. This will be confirmed to shortlisted suppliers if it proves possible within the timeline above

C. Confidentiality

All information supplied by WRT in this tender to date, and any further information supplied during the tender process, is confidential and must not be shared with any other organisation unless WRT agrees permission in writing. This confidentiality extends to all recipients of this information.

This competitive invitation to tender process is conducted anonymously: prospective supplier details will not be shared with other suppliers by WRT, and any sensitive information shared with WRT as part of your response will remain between WRT and your organisation. All enquiries for further information will be summarised anonymously and answered to all parties.

D. Finance

This project is financed directly by Westcountry Rivers Trust. Invoicing terms will be detailed in the NEC4 contract.

WRT will require full assignment of copyright and other intellectual property in all deliverables as a condition of contract, and will own all outputs, content and documentation produced under this commission. The appointed supplier will be required to sign a Data Processing Agreement prior to commencing work.

E. ITT Acceptance

Please nominate one point of contact, with relevant telephone number and email address, to simplify exchange of information regarding this ITT.

Please direct any questions regarding this ITT's content or process to the Project Officer named above. Questions should be submitted in good time for answers to be collated and distributed; a deadline for queries will be no later than one week prior to the submission deadline.

Where there is a valid reason, WRT reserves the right not to accept your submission, or any other quotations received. WRT is not liable for any cost you may incur in preparing your quotation.

5. Additional Notes

If you are also interested in providing ongoing hosting, maintenance or support beyond the core scope of this brief, please indicate this separately in your response.