

## Invitation to Tender

### The Association of Taxation Technicians / The Chartered Institute of Taxation

#### Member Magazine and Newsletter

#### 1. Introduction

This document contains information about the procurement process. It contains specifications each bidder must complete. Each bidder's response should be sufficiently detailed to allow ATT/CIOT to make an informed award decision. All submissions must be sent to Sue Fraser (sfraser@att.org.uk) with appropriate evidence and detail. All submissions must be submitted no later **Tuesday 4 May 2021**.

The Member Magazine is a flagship product, and we want to maintain the quality of content of the package of offerings which we view as a primary communications tool with our members.

#### 2. About ATT/CIOT

The ATT and CIOT are charities who collectively have around 23,000 members and 12,000 students. In addition, there are 3,500 Advanced Diploma in International Taxation students (ADIT) and 200 ADIT affiliates.

Our primary charitable objectives are to promote education and the study of tax administration and practice.

Our key aims are to provide appropriate qualifications for individuals who undertake tax advisory and tax compliance work and to achieve a more efficient and less complex tax system for all.

Our members are qualified by examination and practical experience. They commit to the highest standards of professional conduct and ensure that their tax knowledge is kept up to date. Members may be found in private practice, commerce and industry, government and academia.

More information can be found at [www.tax.org.uk](http://www.tax.org.uk) and [www.att.org.uk](http://www.att.org.uk).

#### 3. Overview of Opportunity

Currently we have:

- A **weekly all-member email** with up-to-date technical news (Appendix 1). Currently the publisher of the newsletter provides basic tax content and early insight/commentary. This is tailored for ATT and CIOT: three separate emails are sent: one to ATT members, one to joint members and one to CIOT members. There is limited advertising in these emails.
- A **monthly hard copy magazine 'Tax Adviser'** (see Appendix 2 for a PDF version produced for this tender pack) with about 12 articles on technical tax topics. These include articles on professional standards and **skills** in areas such as EDI - equality, diversity and inclusion, and appropriate non-technical skills. These are sourced by the publisher, including the Editor-in-

chief. The articles need to cover a wide range of different taxes and tax practitioners' interests. At present, two writers are paid for their articles (Keith Gordon and Neil Warren).

- The technical content of the magazine is also available on a **dedicated website Tax Adviser Online** [www.taxadvisermagazine.com](http://www.taxadvisermagazine.com) (Appendix 3). Much of the content is only accessible by members for a set period of time online. The site is currently maintained by the ATT/CIOT but we would consider reasoned options from bidders that entailed making it available to the successful bidder to manage on our behalf.
- Survey results from a recent readership survey are included (see Appendix 4).

The following magazine content has to be set in magazine format but is entirely produced by the ATT/CIOT, including photos:

- Tax technical and professional standards news from the ATT/CIOT team;
- Two articles from officers of the two bodies;
- Exam results four times a year; and
- News from the ATT/CIOT, including branch events, reports on ATT/CIOT events, etc.

There is a part-time Editor-in-chief employed by CIOT whose role is to help source articles and consider topics to be covered; to review all articles and edit where appropriate - with particular emphasis on technical content; and to act as liaison between the publisher and ATT/CIOT.

The Editor-in-chief is currently a consultant to the publisher to help achieve these aims and is appointed jointly on the CIOT's initiative. There is a magazine editor employed by the current publisher for which TUPE regulations may apply and would need to be considered.

The publisher has tax capability but does not have any tax technically qualified staff engaged in producing Tax Adviser. For several years ATT/CIOT has had editorial control of the magazine through the Editor-in-chief. We welcome your ideas on this arrangement.

There is advertising in the hard copy and online magazine.

The printed magazine does not go to ADIT associates and is based on delivery to members' homes or offices as preferred.

We are looking for:

- Ideas based on your experience as to how the package of technical benefits might be restructured/reconfigured and delivered more effectively and more economically for:
  - ATT members
  - Joint ATT and CIOT members
  - CIOT members
  - ADIT members
  - Subscribers

- A provider (or providers) who we would contract with for the new structure or elements of that structure. We anticipate this will include a monthly, as well as a quarterly, hard copy option;
- A 3-year arrangement to commence later in 2021;
- An environmentally friendly product; and
- Compliance with all accessibility standards.

Bidders will be welcome to interview key ATT/CIOT people to help clarify any issues and prepare their bids. We will make ourselves reasonably available subject to pressures of ongoing work and maintaining broad even-handedness between bidders. Contact details are at the end of this document.

If a bid envisages reducing the reliance on a printed magazine, the alternative provision envisaged should be clearly specified. Costs and benefits of any options to reduce the frequency and/or circulation of printed copies should be specified.

Bidders should state clearly how they would handle any conflicts of interest. For example, if they have their own tax publications and cover any such issues they can identify, such as significant contracts (including contracts of employment) with any currently serving ATT/CIOT officer/trustees/staff.

Bidders may submit more than one proposal and each proposal will be considered separately. We may award different elements of the package to different bidders.

Bidders are asked to indicate whether, if awarded this contract, you would be prepared to consider favourably other ad hoc or additional online publishing projects which might arise.

#### **4. The successful bidder will:**

- a. Be required to design the magazine and/or newsletter (including covers) and/or alternative(s), and research and source topics and appropriate writers for articles, interviews etc, with ATT/CIOT's guidance. Currently the magazine is typically 56 pages plus front and back cover, and from time to time, additional pages for exam results;
- b. Be required to provide their own appropriate imagery (but this along with the content must be in a suitable format for uploading on the magazine website and needs to be licensed for website use;
- c. Be required to distribute the products to all our members (potentially subject to opting out). ATT/CIOT will provide a mailing list;
- d. Produce about 25,000 copies of any hard copy magazine, and any email newsletter will be distributed to c25,000 members;
- e. Sell advertising for the email, the magazine and for the website in line with GDPR legislation and guidance; and
- f. Provide content to other online publishers at ATT's / CIOT's direction.

## 5. Submission Detail

For a bidder's submission to be considered, ATT/CIOT will require the following information:

- a. Total costs and revenues of magazine, email newsletter, and any other components for 2021, 2022 and 2023 with VAT shown separately if delivered by the same bidder.
- b. Separate costs and revenues for magazine, email newsletter, and any other components for 2021, 2022 and 2023 with VAT shown separately if components are delivered by different bidders.
- c. A named point of contact, with contact details.
- d. Details on editorial control of content and contribution to this by either of the parties.
- e. Details of previous experience of designing, writing, publishing and distributing similar products.
- f. Evidence of the bidder's financial strength, customer service commitment and social value including on equality, diversity and inclusion; health and safety; and evidence, and data protection

If you have any queries about this tender, please submit them in writing to Sue Fraser (sfraser@att.org.uk). ATT/CIOT will answer all questions it deems appropriate to the tender.

**Any submissions received later than 17:00 pm on Tuesday 4 May 2021 will not be considered.**

Tender Timetable	
Tender start date	Monday 22 March 2021
Tender closure date	Tuesday 4 May 2021
Presentation Panel	w/c 7 June 2021
Notification of Contract Award Decision	26 July 2021 (after both Councils)
New contract starts	No later than November 2021

### Bidders should note:

- a. All submissions, attached documentation, and related correspondence relating to the tender must be written in English.
- b. Submissions may be withdrawn at any time before the deadline for the receipt of tenders. Revised submissions may be submitted up until the tender deadline.

- c. Submissions must be clear, concise and complete. ATT/CIOT reserves the right to mark bidders down or exclude them from the procurement process if their submissions are ambiguous, lack clarity or are missing specified information. All submissions must include the information detailed above.
- d. All tenders will be evaluated on information submitted by the deadline. Any information submitted by bidders after the specified date will not be included in the evaluation process, save for in response for any specific questions raised by ATT/CIOT.

**6. ATT/CIOT's rights during the tender process - bidders should note:**

- a. ATT/CIOT will not be liable for any bid costs, expenditure, work or effort incurred by a bidder in participating in this procurement, including if the procurement process is terminated or amended by ATT/CIOT.
- b. ATT/CIOT reserves the right to waive or change the requirements of the tender from time to time; ATT/CIOT reserves the right to seek clarification or further documentation in regard to submissions; ATT/CIOT reserves the right to disqualify any bidder that does not submit a compliant tender in accordance with the instructions of this tender.
- c. ATT/CIOT reserves the right to withdraw this tender at any time, or re-invite submissions on the same, or alternative, basis.
- d. ATT/CIOT reserves the right during this process to not produce the magazine or email newsletters for any reason, including non-availability of funding.
- e. ATT/CIOT reserves the right to choose not to award any contract as a result of the current procurement process.
- f. ATT/CIOT reserves the right to make whatever changes it sees fit to the timetable, structure, or content of the procurement process.

**7. Contract Award**

Contract award is subject to the formal approval process of ATT/CIOT. Until all approvals are obtained, no contract(s) will be entered into.

ATT/CIOT will contact all bidders to notify them of the outcome of their submissions. This communication will be conducted by email to the named contact on submissions.

**8. Evaluation Criteria**

This package of benefits is seen as our flagship product and is the main way we engage with our members. We are trying to balance flair and inventiveness in making it something fit for the twenty first century, cost effective, and able to deliver something that will be robustly valued by Members and not seen as a watering down of our offering.

All submissions will be evaluated against the same criteria, as detailed below.

Criteria	Weighting
Cost	30%
Quality of proposed package(s) of benefits (to include environmental considerations)	30%
Demonstrable relevant experience of delivering valued membership benefits of this nature	15%
Ability to meet timescale	10%
Editorial leadership and control	10%
Post issue analytics	5%

## 9. ATT/CIOT Contacts

Please contact the following people if you need any further information:

Strategic direction:

- Helen Whiteman, CIOT CEO, [hwhiteman@ciot.org.uk](mailto:hwhiteman@ciot.org.uk)
- Jane Ashton, ATT CEO, [jashton@att.org.uk](mailto:jashton@att.org.uk)
- John Cullinane, Public Policy Director, [jcullinane@ciot.org.uk](mailto:jcullinane@ciot.org.uk)

Current TA/TAO editorial and other current policies and practices:

- Bill Dodwell, Editor-in –Chief, Tax Adviser/TA Online, [bdodwell@ciot.org.uk](mailto:bdodwell@ciot.org.uk)
- Richard Wild, Head of Tax Technical, [rwild@ciot.org.uk](mailto:rwild@ciot.org.uk)
- Emma Rawson, ATT Technical Officers, [erawson@att.org.uk](mailto:erawson@att.org.uk) regarding the weekly email
- Emma Barklamb, Head of Member Services, [ebarklamb@ciot.org.uk](mailto:ebarklamb@ciot.org.uk) regarding membership/membership benefits queries.

Sue Fraser ([sfraser@att.org.uk](mailto:sfraser@att.org.uk)), for general enquiries.

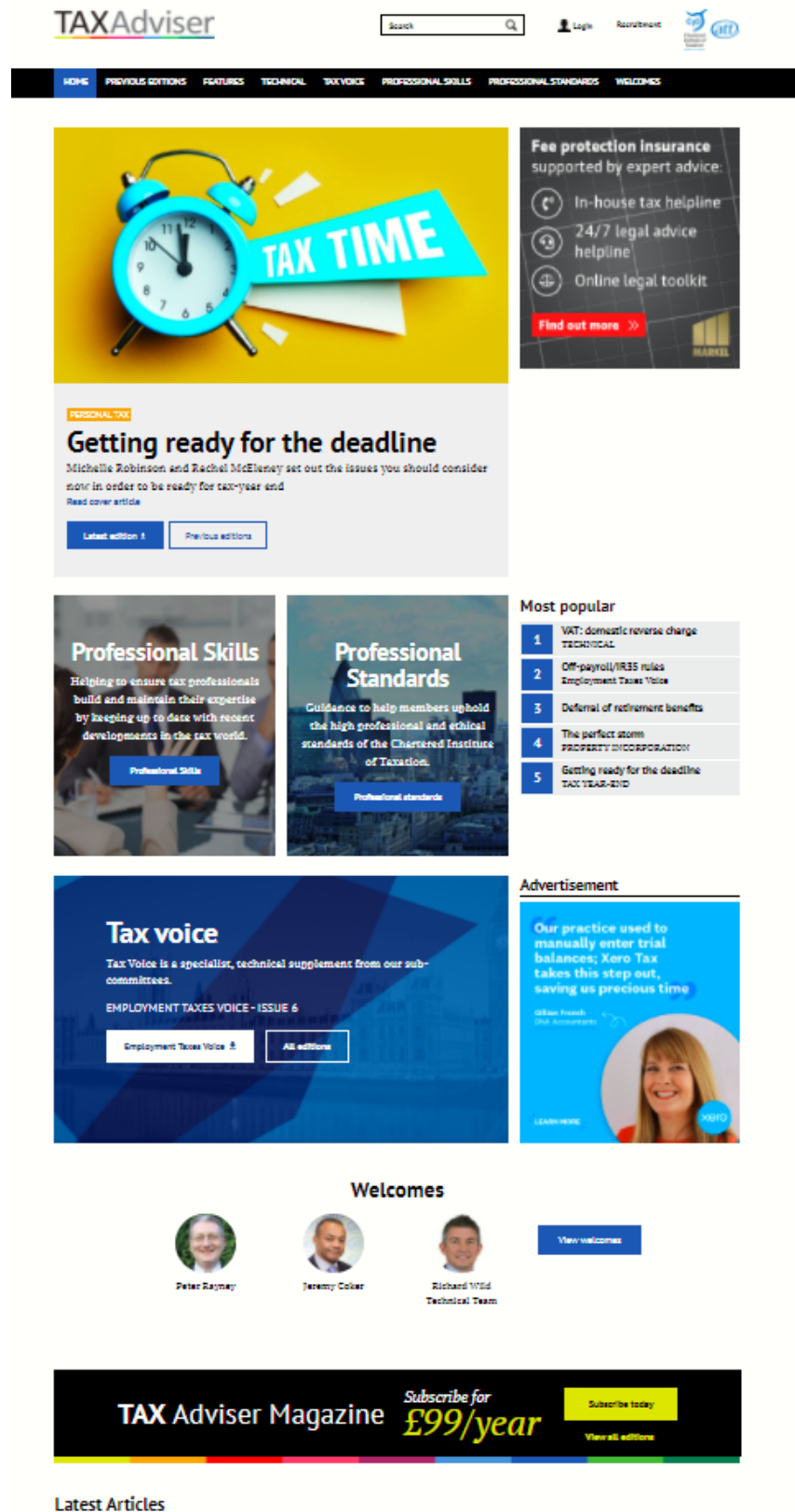
## 10. Appendices

Appendix 1:	Weekly all-member emails to CTAs and ATTs, 4 examples.	Separate document
Appendix 2:	Tax Adviser Magazine – last 3 issues.	Separate document
Appendix 3:	Tax Adviser Online - link to website and screen shot of home page.	See p.7

Appendix 4:	Readership Survey Results	Separate document
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## Appendix 3: Tax Adviser Online


<https://www.taxadvisermagazine.com/>



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