

## NEW PROJECT/CLIENT BRIEFING FORM

Before we start working together on a project or on retained terms, we'll require some more information from you. This form is to help ensure that we gain all of the information that we need before responding with strategic recommendations, creative ideas and a plan.

### BRIEFING PROCESS

Please see an indication of timings for the briefing process, we can tailor these timings accordingly.

ACTION	TIMEFRAME
Opportunity is promoted from	<b>Friday 1<sup>st</sup> September</b>
Deadline to submit a proposal to Ubele	<b>Friday 22<sup>nd</sup> September</b>
Client to notify all applicants of who will go forward for interview	<b>Friday 29<sup>th</sup> September</b>
Interviews	<b>W/C: Monday 2<sup>nd</sup> October</b>
Agency Appointed	<b>W/C: Monday 9<sup>th</sup> October</b>

KEY CONTACT	
Key contact information	Name: Philip Udeh Email: philip.udeh@ubele.org Business address: Wolves Lane Horticultural Centre   London N22 5JD Best days/times to contact: Afternoon week days

ABOUT THE BRAND | PRODUCT | SERVICE | ORGANISATION

Brand name	The Phoenix Way Partnership
Brief description of who you are	The Phoenix Way is a national collaborative partnership led by The Ubele Initiative. It was established during the Covid-19 pandemic to help Black, Asian and other minority-led organisations to access funding and support. The partnership's grant-making decisions are driven by panels of individuals who are rooted in the communities they serve
Owned channels (eg website, social media pages)	<p>Ubele.org                      Youtube                      LinkedIn                      Twitter                      Domain for TPW                      Facebook</p> <p><b>To confirm</b>                      Instagram                      TikTok</p>
Offer/Product/services	<p>Funding for Black &amp; racially minoritised communities                      Promoting equity in the grant-making sector                      Support &amp; Leadership                      Co-design                      Advocacy                      Consultancy</p>
Brand vision	See Phoenix Way Comms Strategy Doc (to be developed with support of agency)
USP	<p>First community wealth and infrastructure focused partnership that focuses on raising parity of black and racially minoritised organisations, communities, groups and individuals.</p> <p>Successfully landing systemic &amp; structural equity with resources secured to emphasise the influence of our</p>

	<p>partnership.</p> <p>Black leadership</p> <p>National community leaders</p> <p>Credibility</p> <p>Access to communities</p>
Customer	<p>Black and racially minoritised organisations and groups in the UK traditionally excluded or underfunded by traditional grant making organisations, trusts and foundations.</p> <p>Grant sector / funders</p> <p>Govt / Policy makers</p>
<b>YOUR MARKET</b>	
Competitors	<p>No -direct competitors in the grant-making space. Though traditional funders saturate the space and have sizeable resource advantages and infrastructural reach, that potentially can drown our voice.</p>
Brand challenges	<p>New brand</p> <p>TPW /Ubele confusion / overlap</p> <p>Dispersed partnership model &amp; non-linear decision making processes.</p> <p>Resourcing</p> <p>PR/ Comms/ Marketing synthesis</p> <p>Brand guidelines / tone of voice</p> <p>Measuring comms / marketing penetration</p> <p>Reaching those traditionally hard to reach and excluded (specifically audience if not organisations)</p>

	Partners/ funders rigidity around use of their own brands and association of brand.
Brands we admire	Paucity of brands is the issue we need to address. Orgs do great work, but cannot articulate a 'brand' so to speak.

**THE ROLE FOR PR | MARKETING | COMMUNICATIONS**

Overview of initiative	Fundamentally growing a grass roots up campaign. One where the people we serve feel an active part of who we are. Amalgamating the objectives within a framework that fundamentally shifts the conception of black organisations as mainstream that raises their parity of esteem while simultaneously ensures that we drive the change within the system that often lets them down. Create a momentum that starkly draws a line and arrests inequality in this space. Pertinently to ensure that within the funding space people are asking the question they currently don't. The question of whether or not they serve all communities. For funders to recognise that you cannot solve an issue you don't know you have, or not looking for.
Commercial objectives	Revenue Growth for more support of Black and racially minoritised groups....
Campaign objectives	Raise awareness of TPW Establish TPW as the trusted philanthropic partner of choice for Black & racially minoritised organisations. Drive impetus for broader systemic and structural change within the broader grant funding sector

	<p>PR/Comms/ Awareness of regional partnerships and the TPW way.  Grow the partnerships  Share learning  Drive traffic across our comms / marketing matrix.  Establish efficient and easily repeatable processes, messaging templates around often repeated tasks.</p>
<b>Audience</b>	<p>Black and racially minoritised / groups and people  Trusts/foundations/ Funders  Policy makers influencers  Black and global majority HNWI</p>
<b>Budget</b>	<p>Provisionally up to £100K (CapEx + OpEx)</p>
<b>Engagement time frame or type</b>	<p>Go live is officially November 2023 though we are aiming to extend this potentially.</p> <p>ASAP</p>
<b>Preferred activation route? (Media/Content/Experiential)</b>	<p>Ideally a cohesive use across different collateral to ensure the broadest awareness at initiation. Noting that choice of route may have different demographics that engage with said route.</p>
<b>Supporting agencies partners/individuals</b>	<p>Global Fund for Children  Chanel Foundation  Lloyds foundation  The National Lottery Community Fund  Youth Endowment Fund  X6 regional Leads  GLA  + other direct / indirect stakeholders within our sphere of influence.</p> <p>(Unified through single access point and coherent sign off process)</p>
<b>Is this part of a competitive pitch process?</b>	<p>Yes – though this may not be formal scored tender. It is critical that we make</p>

	<p>commissioning decisions that reflect effectiveness, value for money, fairness and transparency.</p> <p>Process may be defined by broad questions and pitch.</p>
<p>What does success look like?</p>	<p>Ubiquity around TPW – its services/ partners/ funds</p> <p>Unique (new) Funders / Trusts/ Foundations actively sourcing TPW as their philanthropic route to Black global majority diasporas.</p> <p>Policy influence</p>
<p>Deliverables/KPIs</p>	<p>TBC – outcomes matrix for projects hasn't been codified – most of this work aids that objective.</p> <p>There is also a learning curve here and the model will be iterative and need to be adaptable. Some of the deliverables need to be conversation with sourced partner on what is feasible /practicable and proportionate given resources available.</p>