Development Services: Website & Customer Relationship Management (CRM)

The Poetry Society (Incorporated), Charity No. 303334

Short description

The Poetry Society (TPS) is tendering for service providers to work with us in replacing an end-of-life manual database with a fully integrated CRM, modernising a 10-year-old website for greater accessibility/discoverability.

Total value of the procurement (excluding VAT)

Value excluding VAT: £101,500

Description

The Poetry Society (TPS) is tendering for service providers to work with us in replacing an end-of-life manual database with a fully integrated CRM, modernising a 10-year-old website for greater accessibility/discoverability.

The work will have 5 phases (see II.2.4 for expanded detail):

- Discovery
- User Experience Design
- Technical Development
- Training and Implementation
- Future support / ongoing learning

Process and programme

- The work is expected to take place over 18 months during 2025 and 2026
- The work will be carried out in partnership with TPS staff and will require significant engagement with external stakeholders and partners.
- The supplier will have regular meetings with TPS project lead and provide updates on progress, identifying issues as they arise and seeking to actively overcome them in collaboration with TPS

The supplier is required to provide the following deliverables and services:

- Work with TPS to plan and implement discovery process
- Provide wireframe for website re-design centring optimal user experience and accessibility
- Implement web build and technical development of integrated CRM, updated webshop requirements and submissions portal
- Transfer legacy database data to new CRM

- Provide sessions of training for TPS users
- Provide de-snagging service once live

The supplier must be able to provide and demonstrate strong project management skills and experience in delivering the above digital infrastructure to the agreed schedule.

Who we are: The Poetry Society was founded in 1909 to promote 'a more general recognition and appreciation of poetry', since then it has grown into one of Britain's most dynamic arts organisations, representing British poetry both nationally and internationally. Today it has more than 5,000 members worldwide and publishes the UK's leading poetry magazine, *The Poetry Review*. With innovative education and commissioning programmes and a packed calendar of performances, readings and competitions, The Poetry Society champions poetry for all ages. As well as the Foyle Young Poets of the Year Award, The Poetry Society runs the National Poetry Competition, one of the world's longest running and most prestigious prizes for an individual poem.

The Poetry Society is a National Portfolio Organisation, as designated by Arts Council England. We have charitable status and provide support and information for specialists and the general public. We engage with and support diverse poetry audiences through events, publications, promotions and prizes and ensure the highest artistic quality throughout all our endeavours. Our key objective is to create and maintain a central position for poetry in the arts and continue to build new avenues to promote poets and poetry in Britain today.

The Poetry Society is a registered charity (no. 303334). Annual reports can be viewed on our [website](). Our external stakeholders include our worldwide membership of over 5,000, subscribers (both private and institutional) to our publications and the wide array of poets and educators with whom we work. Our internal stakeholders include our board of trustees and our entire staff team, who will be using the resulting CRM regularly (we estimate a daily average of 10–12 users).

Key staff members who will be involved in this project are:

Director – Judith Palmer
Publishing Manager – Jane Ace
Marketing and Communications Manager – Ben Rogers
Education Manager – Natasha Ryan
Membership Manager – Sharon Kwan

The Poetry Society invites bids for the provision of services to replace an end-of-life Access database with a fully integrated cloud-based CRM, the modernising of a ten-year-old website for greater accessibility/discoverability, and the integration of data flow between service components (including, but not limited to, membership management, multiple poetry competition submission schemes and databases of

poetry, poets and more). This project will support our ambitions to reach increased audiences with more accessible and efficient services.

A central focus of this project is the transformation of our capabilities around data and analytics. Our current analysis of data is largely manual and compartmentalised. We can report how many members we have, but we cannot track individual journeys to understand patterns of retention or the pathways that have brought people to deeper engagement with us. This project will implement a customised data system that will allow us to identify gaps more effectively in our audiences, build closer connections with underserved communities, support poets across their whole career, and listen better to the voices of the public, artists, children and young people.

This project must significantly update and improve digital accessibility across all Poetry Society user interfaces, particularly with consideration for assistive technology users (including people who use screen readers, magnifiers or similar alternatives). As well as improving accessibility on a technical basis, it is essential that the update enhances user experience and engagement for disabled people through features such as personalization, closed captions, voice styles, WAI-ARIA and creative enhancement such as audio descriptions and BSL that don't simply 'translate' poetry but bring enjoyable performance qualities to all. A framework will be established with the successful supplier to guide quality and task-based improvements from design and build stages through to ongoing usage, but we include a draft outline of project phases below. User-testing with Poetry Society audience members of both accessibility and new developments should be part of the process.

The Poetry Society is dedicated to the reduction of carbon emissions, including those linked to the data storage and transfer associated with our databases, websites and other digital infrastructure. The successful tender will provide methodologies to achieve this and guide the Poetry Society in measuring and reporting improvements, while avoiding 'greenwashing'.

Finally, this digital development is targeted to improve retention and renewal of members by automating membership payment and joining processes, identifying lapsing members and speeding the renewal cycle. It must facilitate our numerous competition submission processes that run throughout each year and often attract high numbers of submissions which then must be managed, validated and made available for selection by panels. Our work with partner organisations, across a wide variety of initiatives, will also need to be incorporated, with special consideration given to the diverse needs of all stakeholders.

Outputs (the immediate, tangible requirements of the CRM)

- Must be operational, analytical, collaborative and strategic (working with existing WordPress web platform)
- Development must integrate fully with existing and future software, e.g. accounting and comms platforms
- Be futureproofed and customisable, and as mobile as possible

- Project must establish baseline rates and monitor reduction of carbon emissions, including those linked to the data storage and transfer associated with our databases, websites and other digital infrastructure
- Be cloud-based, secure and follow best practice with data privacy
- Allow for unlimited number of users (public) and for staff access to be changeable
- Provide exceptional levels of customer services: quick responses to enquires, regular communication, efficient administration, clear messaging about change, transparent processes and procedures
- Automate membership renewals and delivery of important reminders, latest content, event invitations and reports. Allow segmentation for more targeted communications and customized emails and other outreach to members based on particular interests, membership levels or other selected characteristics.
- Allow effective marketing campaign management
- Allow the developer to configure the system over time and create new functionality when required
- Feature reporting and dashboards to easily visualize membership revenue, outreach efforts, event attendance, member retention rates etc, supporting a range of different data enquiries for different members of the Poetry Society team.
- Feature financial management tools to ensure budget control while tracking revenue growth from events, member dues, retail sales, grants and donations.

Outcomes (the desired longer-term changes and impacts)

- Radically improve our capabilities with data and analytics
- Development must significantly update and improve digital accessibility across all TPS user interfaces (for external and internal stakeholders)
- Avoid and limit ongoing and/or expensive licensing costs
- Reduce TPS carbon emissions

We anticipate that the work will have five main phases, which will include the following tasks and milestones.

1 DISCOVERY
Start-up session with relevant stakeholders to review proposal of successful suppliers
Planning workshops with key staff
Current systems analysis
Review of available CRM platforms (e.g. Salesforce, Hubspot, CiviCRM, Neon) re-scoping and decision on which to use.
Access Advisory Focus Group first session
All-Ages User Focus Group second session
Agree necessary preparation for transfer of legacy data
Establish baselines for CO_2e reduction plan
Accessibility audience consultation (focus group)
Draft, refine and agree discovery strategy documentation with TPS

2 USER-EXPERIENCE (UX) DESIGN
Evaluate UX design for key engagement points
Revise site structure and data models
Wireframe new flows / user journeys to key engagement points, map to data flows
Agree wireframes with TPS

3 TECHNICAL DEVELOPMENT
Membership process and management
Legacy database data ready for transfer
Develop CRM integration infrastructure
Technical Development Sessions with Access Advisory Group and All-Ages User Group
Develop CRM integration infrastructure
Map fields in CRM
Rework membership interfaces / make UX improvements
Integrate finance software with website
Develop data flow infrastructure for membership
CRM / data administration training
Usability and accessibility test of membership process
Test and refine membership process
Sign off membership database

Online shop
Online shop systems review and improvements
Develop shop UX improvements
Shop / CRM data integration
Usability and accessibility test of online purchases process
Third Session with Access Advisory Group / All-ages User Group usability testing
Test/refine shop system

Monitoring of business metrics
Establish dashboard for environmental impact monitoring

Competitions/Submissions
Develop submission process
Integrate submission data with relevant systems
Usability and accessibility test of submission process
Create judging infrastructure with new setup
Test submissions process

4 TRAINING, IMPLEMENTATION AND LAUNCH
Membership process training
Release membership process to live site
Shop systems training
Release shop module to live site, set up of ongoing accessibility monitoring
Training on poetry competition management process

Release submission module to live site

5 FUTURE SUPPORT/ONGOING LEARNING PHASE
Refine engagement points
Develop integrations
Trial analytics

Closing date   Thursday 12 June 2025
Closing time   11:59pm

Bidders notified   Friday 20 June 2025 (est)

Contract start date   23 June 2025
Contract end date   18 December 2026

Bidders will be evaluated on written submissions only.
The successful bidder will propose the contract document for TPS approval.

Award criteria

Ability to deliver a sustainable project to programme: 20%
- Company robustness and capacity – provide company accounts and turnover for the past three years, indicating what percentage the project would represent for your business.
- Sustainability – provide a 1-page explanation of how the environmental impact of the proposed solution would be evaluated

Quality of team and relevant experience: 20%
- Provide CVs/Indicate skills and experience of staff allocated to the project
- Demonstrate relevant experience and ability to apply it to TPS project by supplying three case studies (no more than one page each) of work of a similar type and scale

Understanding of TPS requirements and approach to solution: 50%
- Provide a description and schedule (assuming contract to be awarded in early June 2025) of how you will approach each of the five stages, taking into account other points of high demand on TPS staff noted below. Please indicate how areas of risk would be addressed, how accessibility requirements will be met and proposals for engagement with internal and external stakeholders

January	
February	
March	End of year reporting /World poetry Day / National Poetry Competition Awards
April	

May	
June	Arts Council England reporting
July	
August	
September	
October	National Poetry Day / Foyle Young Poets Awards
November	
December	Office closure Christmas Eve to 1 January (inclusive)

Cost / value for money: 10%

- Please indicate required for payment stages and weighting for division of £101,500 over each of the five stages (include breakdown of work and relevant team members involved)
- Provide indication of charge out rates for members of team

Duration of the contract, agreement etc

Summer 2025 to Winter 2026 with ongoing support