

Invitation to Tender

Tender for Customer Relationship Management (CRM) System

Horniman Museum and Gardens

March 2021

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## Introduction

This statement of requirements sets out the scope and requirements for a Customer Relationship Management (CRM) system that will be used by the Horniman Museum and Gardens (the Horniman).

### The Organisation

The Horniman Museum and Gardens is an inspiring, surprising, family-friendly attraction in South London's Forest Hill. It is an independent charitable trust, core funded by the Department for Digital, Culture, Media and Sport.

The Horniman has been open since Victorian times, when Frederick John Horniman first opened his house and extraordinary collection of objects to visitors. Since then, the collection has grown tenfold and includes internationally important collections of anthropology and musical instruments, as well as an acclaimed aquarium, Butterfly House, and natural history collection.

Visitors come time and again to explore the Museum, take part in activities and enjoy the 16-acre Gardens. And they discover something fascinating and mesmerising every time. Our Museum and Gardens have continued to be a source of comfort and stability to our visitors and local community throughout the COVID pandemic.

The Horniman has a large and diverse range of visitors, attracting over 900,000 visitors to the Museum and Gardens in 2019/20. The diversity of our public programmeand our seven day per week operation means that we need a system that canbe supported 24/7 and can be accessed remotely from anywhere and from an array of technical set-ups.

The Horniman Museum Customer Relationship Management system was last reviewed in 2014. We are now looking to upgrade to a modern and intuitive system which will help the Horniman with its objectives and mission.

The Horniman workforce is currently made up of circa 140 employees. Approximately 20% will have access to the system but not all users would use the system at the same time.

#### Organisation Objectives

The organisational mission is: The Horniman connects us all with global cultures and the natural environment, encouraging us to shape a positive future for the world we all share.

The Horniman has three long term objectives:

**Access**

* We will use the collections and Gardens to stimulate curiosity and wonder, promoting opportunities for people of all ages, abilities and backgrounds to participate in and enjoy exhibitions, educational programmes, activities and events - both face to face and online.

**Collections**

* We will safeguard and develop the collections so that they can be made as accessible as possible now and into the future.

**Shaping the Future**

* We will effectively manage our resources and become more resilient so that we can continue to develop and share our collections, estate and expertise for the widest possible public benefit.

The Covid-19 pandemic, the accelerating climate and ecology emergency and the urgent need to address long-standing issues of racism and discrimination have led us to review and agree a series of priorities in a new **Reset Agenda.**

Today, the Horniman is London’s only museum where environment, ecology and human cultures can be seen side by side at a global scale. This means that we will place the interlinked issues of climate, biodiversity and social justice at the centre of what we do. We are therefore embarking on a co-ordinated programme to draw together different strands of existing and new work to acknowledge our colonial history, diversify our audiences and staff, address environmental and social issues and secure our economic future. The Reset Agenda priorities are:

1. Consult people and work in partnership
2. Address the history of the Horniman business and of institutional collecting
3. Engage wider audiences through programming and communications
4. Enhance our digital capabilities
5. Diversify staff and volunteers
6. Make the Horniman greenhouse gas neutral and more biodiverse
7. Maximise income generation.

### Background

Since the inception of our current CRM system in 2014 our combined membership and ticketing revenue has grown by 165%. It is vital that we protect this income, while finding new ways of generating more income in a cost effective way. A new CRM is key to unlocking a great deal of potential income we are currently unable to access.

We are keen to investigate a solution that incorporates the elements listed below:

#### General admissions and events

Entrance to the Horniman is free, however there is a charge for entrance to the Aquarium, Butterfly House and Temporary Exhibitions. We also provide the public with a full and varied events and activities programme, which are a mix of free and charged tickets. At present, and for the foreseeable future, events are virtual and are hosted via web conferencing platforms such as Zoom and Microsoft Teams.

We require all visitors to pre-book their visits at a particular time slot. This allows us to ensure that social distance is being adhered to and the safety of all who visit our Museum.

#### Retail

Cybertill is our retail and stock management system for our Museum shops. In addition to the Shops, we have some retail items available at the admissions desk and on our e-commerce platform; these items are sold via our ticketing system, RecreateX, and recorded manually on Cybertill. We would like to explore either moving our retail and stock management to a unified CRM or integrating Cybertill with the system so that all retails sales are recorded in real-time and against visitors’ CRM records.

#### Memberships

The Horniman’s popular membership scheme was launched in November 2013. Memberships grew to c. 8,800 by January 2020 (estimate c. 30,000 individuals), but during the pandemic this number has decreased. We need a system capable of managing and growing our membership base. We would like the ability to track our members’ journey with the Horniman via data, and provide access to events and ticketing benefits. We would also like to produce targeted, relevant, and accurate communications, and cultivate our database for new members.

#### Fundraising

We have approximately 50 Benefactors who give monthly and annually, ranging from £20 per month to £5,000 per year. This year alone, we have received hundreds of individual donations, mostly from new donors. We need a system that can support these Benefactor memberships as well as individual donations, pledges, corporate donations, and Trusts and Foundations.

#### Web site and Digital e-commerce Platform

Our website receives upward of 1 million visits a year. We have regular peaks in traffic during school and bank holidays, when key events and exhibitions go on sale (such as our family friendly exhibition) and incidental days (like snow days).

During these busy times we can expect between 4-7k users per day generating between 5-8k sessions per day. We have occasional viral peaks in traffic up to 17k users/20k sessions.

The quietest times of year for web traffic usually occur in December (which is also the only time we close, over the Christmas holidays). At these times we can expect 800-1.5k users/sessions per day.

In the web shop specifically, we have more distinct peaks which line up with February and October half terms, Easter and Bank holidays. The peaks in the web shop see between 1k-2.6k page views per day. A typical day outside of holidays would see between 100-600 page views.

#### Schools and Learning

Pre-COVID, the Horniman’s Schools Team taught an average of c.950 classes a year, with a further c.400 school groups booking self-led visits. All bookings are currently made via email enquiry or over the phone, and entered into a separate FileMaker system that was developed for the sole purpose of managing school sessions.

The existing schools booking system, access to which is limited to the Schools and Finance teams, was tailor made around seven years ago. It is used to store organisation and teacher data, to allocate teaching spaces and sessions, to send auto-correspondence, and to monitor invoicing. It is an essential part of daily operations. The booking system is connected to a live website that automatically creates accounts for each teacher when they book. Teachers must log-in to access up-to-date information about their booking and, crucially, to manually confirm their booking, which in turn updates the record within our booking system.

#### Membership/Customer Relationship Management (CRM)

We have a wide audience base, with a high level of repeat visitors and a high penetration in our local communities. We need to be able to manage customer records to track visits as well as produce targeted marketing campaigns through mailing lists generated from the system, allowing visitors and members to be grouped by membership type and/or by areas of interest.

The Horniman’s customer data is currently stored in seven databases, which means a customer’s data can be potentially stored on all seven if they have bought tickets, joined as a member, donated money, signed up to the mailing list, or are involved in education:

* RecreateX – ticketing and memberships, including Benefactors
* Raiser’s Edge – fundraising, including Benefactors
* MailChimp – customer emails and contact preferences
* Schools Database (FileMaker) – schools details
* Donorbox – donations made online and Benefactors who renewed or joined during the closure
* Survey Monkey – on-line forms and post event surveys
* Spreadsheets – an array of customer information which cannot be stored on any of the above databases or staff find easier to manage outside these

We are seeking to consolidate this data into one manageable system.

### Project Objectives

The Horniman would like to migrate to a CRM system which allows us to see each interaction across every area of activity and each point of the customer’s journey with us.

The key objectives of the new CRM system are:

#### Customer Experience

* Easy navigable and flexible online booking system which is intuitive to customers’ needs, status (i.e. memberships), and history with the Museum
* A sophisticated CRM system which allows a personalised approach to fundraising and marketing
* Robust and flexible membership system – simplified processes for purchasing, renewing and upgrading memberships, plus identifying potential members

#### Staff and Organisation Efficiency

* One customer record – purchases and donations, plus interests and communications, everything about our customers to be accessible from one point
* Encourage collaboration and understanding across departments – enable teams to work together on long term customer goals that span departments and deliverables
* Fewer systems that will result in a more productive workforce

#### Opportunities

* Spot trends and identify opportunities to deepen engagement – data from customer interactions or transactions to be pooled to create sophisticated reporting, analysis, rankings, and segmentation models
* Develop and build a successful fundraising strategy – cultivation of potential donors from a comprehensive database of a person’s interests, history, donating and booking behaviour
* Increase the engagement and retention rate of members by combining ticketing history, reporting, and marketing
* Better sales insight and tracking to provide return on investment for advertising and promotions

#### Supplier Support and Communication

* Support from a system provider who understands the arts and culture sector in the UK
* Gives us access to a wider support group within the sector who we can share ideas and solutions with
* Full integration with other tools; email marketing software, payment providers, financial systems etc.

#### COVID Pandemic

More importantly we would like a CRM system which will help us navigate the evolving situation that the COVID pandemic presents allowing us to:

* Offer digital and contactless technologies
* Be responsive to ever-shifting timelines and needs – easy administration of events and the ability to quickly and clearly communicate our plans to our customers
* Increase our revenue streams with the ability to claim gift aid, offer supplementary products, ability to donate ‘what you can’ in the purchase path etc.

All queries relating to this invitation to tender should be addressed to:

Lee-Anne Inglis

Systems and Data Officer

Tel: +44 7740 585 160

Email: [lainglis@horniman.ac.uk](mailto:lainglis@horniman.ac.uk)

## Scope of Tender

### Elements

The tender package comprises of the following key elements:

* Work with the Horniman to develop a detailed scope for the project. Work to our programme and deadline.
* Provide a consultation service (“Business Process Mapping”) that will allow the supplied software to be best configured to suit the requirements of the Horniman
* Install and configure the chosen application software and work with Horniman staff as necessary to ensure successful implementation
* Data transfer, conversion, and mapping – the supplier will be responsible for extracting data from the existing system converting and/or mapping the data as per the Horniman’s requirements
* Assist Horniman staff with user acceptance testing of the system/software and correct any components that fail to meet the agreed specifications
* Provide training in the new system to Horniman staff
* Preparing the system for live use
* Training/test environment – we will require the system to have a separate environment for ongoing training and testing purposes
* Provide up-to-date documentation for management and use of the system
* Provide ongoing maintenance and support for the system

## Tender Responses

### Tender Submissions

Formal tender submissions must be received by 19th March 2021, 5pm.

Tender submission should be made through email to Lee-Anne Inglis, Systems and Data Officer, [lainglis@horniman.ac.uk](mailto:lainglis@horniman.ac.uk)

Receipt of submissions will be acknowledged by email.

### Supplier Interviews

Tender responses will be evaluated and shortlisted companies will be invited to give a presentation on their proposals for the system. The presentations will be followed by questions from the client team.

It is expected that supplier presentations/interviews will take place during the last week of March or early April 2021. Due to the current restrictions in place because of the pandemic, interviews will take place via Zoom. Specific times will be arranged directly for each shortlisted supplier.

Please note that due to ongoing restrictions we envisage that site visits will be not be possible until such time the COVID restrictions assigned to London permit this.

### Structure of Tender Submissions

Tender submissions must include all of the following information:

* Brief summary of your response
* Summary of your experience implementing ticketing, events, and CRM systems for institutions of a similar size and complexity. We are particularly interested in how you provided assistance to your clients during the pandemic.
* A suitable single point of contact for all correspondence relating to the tender
  + This should include email address and telephone numbers
* Description of the methodology that will be used:
  + Suppliers should provide an outline description of the proposed approach that will be adopted to deliver all aspects of the project
  + Suppliers should also provide details of the project team along with roles and responsibilities of team members
* An outline of the proposed solution
  + Software and licensing arrangements
  + Details of your hosting service and support agreement, including details of what measures are in place to provide a secure environment and ensure compliance (PA-DSS, PCI, and GDPR)
  + Methodology for product development
  + Methodology for updates, testing, and deployment
  + Future product strategy
  + Installation and configuration
  + Data conversion
  + Testing
  + Training
  + Commissioning
  + Data security
* Clarification that the proposed software solutions meets the Horniman’s requirements as set out in section 5 of this document
  + Suppliers should refer to all points in sections 5 (system requirements) stating whether the requirement is met through an existing version of the software
  + Suppliers should identify if any functionality required will need to be met by bespoke programming or a future version of the software package – we will required specific details of that future release, including release dates
* Details of any added value or additional functionality in the solution which is considered to be relevant to our needs
* A fixed price proposal:
  + This should be an itemised breakdown of costs rather than a single lump sum figure
  + Software licenses
  + Data conversion
  + Project management and configuration
  + Testing
  + Training
  + Annual maintenance and support
  + Costs should be quoted excluding VAT
* Details of day rates – these will be used to assess costs for additional services
* Details of any licensing arrangements and/or terms and conditions associated with the overall solution
* Description of support and assistance services available along with associated costs
  + Specific reference must be made to support hours
  + Service agreement, including methodology, response times, and escalation procedures
* Description of any warranties associated with the solution
* Indicative project delivery plan showing key milestones and deliverables for installing, configuring, and commissioning the solution
* Names of three referees for whom you have delivered similar solutions who may be contacted following the shortlisting process
* A client list
* A draft contract/terms of business
* A signed anti-fraud and bribery statement as included in the tender pack.

Prices and any financial data provided must be submitted in £ Sterling, exclusive of VAT. Where official documents include financial data in a foreign currency, a sterling equivalent must be provided.

### Selection Criteria

Tender responses will be evaluated against the following selection criteria:

* Ability to meet our systems and functional requirements – 40%
* User customisation of system – 15%
* Price – 20%
* Ongoing support costs – level/cost of service – track record – 10%
* Added value/additional services – 5%
* Product development strategy and updates – 10%

### Contract Award

Suppliers and those organisation looking to bid for public sector contracts should be aware that if they are awarded a new contract with a publicly funded body, the resulting contact will be published. In some circumstances, limited redactions will be made to some contracts before they are published in order to comply with existing law and for the protection of national security.

## Project Implementation

### Project Organisation

It is expected that the successful supplier will appoint a project manager to work with the Horniman during the requirements, configuration, testing, and installation stages of the project.

### Project Timetable

We wish to commence implementation of the new system as soon as possible, with the goal of having it in place to allow for advance sales of our February 2022 exhibition at the latest.

The supplier will work with the Horniman to establish a final project delivery plan, however this is the proposed timeline we are working towards

|  |  |
| --- | --- |
| 19th March 2021 | Tender closes |
| 29th March – 9th April 2021 | Pitch for selected suppliers |
| April 2021 | Appoint supplier |
| May – June 2021 | Scope and working spec development, research |
| June – December 2021 | Build, test, training |
| December 2021 - January 2022\* | Deliver new CRM system |

\* Implementation may be a phased approach depending on each department’s schedule. It is hoped that the core CRM system(s) will be migrated to the new CRM system in December 2021 or January 2022.

## Key Requirements

### General Requirements

It is anticipated that a single supplier will be selected to deliver the specified requirements, through the provision of a unified software package and be responsible for successful implementation and ongoing support.

The core component of the package will be a fully functional CRM software application, incorporating an integrated customer database and a full relationship management suite, for supporting CRM, Marketing, Fundraising, Retail and Admissions, Event Management, Memberships, and e-Commerce (including mobile sales and ticketing).

In addition the solution must provide:

* General admissions and sales
  + Multiple tickets types and prices, discounts, dynamic pricing, members only access, groups rates
  + Ability to build time slots for museum and exhibition entry
  + Packages for multi-entry admissions, i.e. combination entry to our Butterfly House, general Museum entry, current exhibition area, and Aquarium
  + True capacity recording i.e. a family ticket to count as 4 visitors not 1
  + Event-based sales, with possible future integration with our event management software Artifax
* Fundraising and Membership Management that can support donations, pledges, corporate donations, memberships of differing levels, and Trusts and Foundation management
* Support future memberships schemes such as ‘Adopt an Animal/Object”
* Full working integration with various components of our Business Solution, such as Sage200, Artifax, and e-marketing software (currently MailChimp). We are also exploring the possibility of integrating our café retail system to our CRM system for reporting purposes.
* Paperless direct debit payments and renewals
* Support all UK and international payment methods
* Digital Transaction/Ecommerce platform – ticket sales, add-on items (programmes), memberships, and donations.
* Gift Aid sales and reporting
* Good management reporting, including dashboards, audits, systems, and the ability to build custom reporting
* E-tickets, membership cards, ticket design, and printing
* Accessibility – both the digital ecommerce platform and the client must be able to accommodate a variety accessibility requirements. The digital platform must meet W3C A and AA standards
* User friendly – the system needs to be user-friendly for Museum staff and customers
* Flexible – we require the system to be flexible to adapt well to the Museum’s organisational and business needs, or future legislative requirements. This is especially important during the COVID crisis due to the ever changing nature of lockdowns and Government guidelines.
* Statutory compliant: All tools must comply with all relevant statutory regulations, including Data Protection, GDPR, PECR, PCI DSS, and W3C A and AA.
* Fully supported – the system and solutions are expected to be fully supported for at least the length of the contract
* Fully tested prior to live implementation and future upgrades to the system
* Mitigating the climate and ecological emergency is an important part of our work, and we would like help to establish baseline data of the green carbon footprint of the solution that is developed. We would then welcome assistance to reduce that footprint as part of our ongoing relationship.

### Web and Digital

The Horniman website ([horniman.ac.uk](https://horniman.ac.uk)) has undergone redevelopment and a new site was launched in March 2020, following development work with Cog Design. The site is built on WordPress and is hosted by server specialists who have experience of collection based sites, Sun Dive.

The website development project is in the final stages of this development: an accessibility audit, reskinning the existing web shop to bring it closer to the main site, and snagging for the collections area.

Our website recently surpassed the 1 million visits per year point and is now seeing the majority of our traffic mobile led.

As a visitor attraction, we have lots of different communications needs, as well as multiple audiences and integrations with existing third-party packages.

Third party integrations - how they integrate:

1. RecreateX (Managed by Gantner) – ticket booking and membership system, which also powers/hosts our web shop. This sits on a subdomain webshop.horniman.ac.uk, is hosted on Horniman servers.
2. CIIM (Information from MIMSY database, managed by Knowledge Integration) – delivers the collections records to the website along with the Horniman wiki (DocuWiki) and an image server, hosted on Horniman servers.
3. Horniman Wiki (managed by us) – delivers marked up text to the collections records, alongside the CIIM.
4. Mailchimp (Enews sign up) – forms embedded within the website.
5. Donorbox (fundraising widget) – widget embedded within the website.
6. Google tools - Analytics, Adwords, Tag Manager, Webmaster
7. Online forms – Survey Monkey and Typeform
8. Social media post integration, cards, sharing, embedding etc. – Twitter, Facebook, Instagram, YouTube, Pinterest, Tumblr, and Flickr.

The key requirements for the new e-commerce platform are:

* Online sales for various types of events, including Museum entry, exhibitions, virtual events, community learning etc.
* Real-time response between e-commerce platform and database, allowing for ticketing rules and offers based on the booker’s account. Also to reflect the current prices and availability.
* Tickets cleared automatically if left in customer basket after a certain time period
* Sale of and administration of memberships, including Members' only area to allow them to manage their own memberships and book members' only events
* Mailing and subscription preferences, linked to customer record on CRM showing current selections
* Customer Password resets via digital platform and client
* Integration with ecommerce function for managing donations
* Simple / straightforward interface (web shop or widgets) throughout, including log in and checkout for usability
* Web shop/widgets mobile first, but tablet and desktop friendly (responsive)
* Ticket in accessible html email/booking page confirmation - not as attachment
* Integration with WordPress CMS Horniman website
* Ability for users to update customer data
* Pixels, Google Analytics and Tag Manager to track different stages of checkout/donation etc.
* Can brand web shop/widgets - skin to rest of website
* Thank you message on shop purchase / links back to plan your visit etc.
* Web shop/widget easy to see dates / time slots available
* Ability to show number of tickets left (\*or to switch this function off if large capacity)
* Queue function at busy times
* Data security protocols, security certificates etc.
* Email to be unique identifier in creating an account
* Fast speed of service for users (front and back end) at busy times

### Retail and Admissions

The purpose of this department is to drive income generating activities through ticket sales, gift aid, memberships and retail products across the Museum shop’s and ticket desks.

Prior to the pandemic this was largely in person sales, with an improved web shop we aim to push more sales online to reduce congestion in the Museum entrance, and manage peak periods more effectively.

We currently run our admissions and event sales through ReCreateX, for retail we use a specialist platform called Cybertill, we have some retail items available at admissions, but this is currently restricted due to using two separate platforms.

The vast majority of our Memberships are sold in person at the ticket desk, so it is important that there is strong functionality on the EPOS to enable us to process these quickly and efficiently without inconveniencing other customers.

Booking and ticketing:

* Ability to bulk edit events and time slots, including; pricing, times, capacity, availability
* Ability to print barcodes
* Cross selling of tickets/retail online
* Dynamic pricing
* Offer management products

Stock Management/Retail:

* Stock check/stocktake module
* Create purchase orders for retail items
* Reporting of faulty stock
* End of day reporting ability to reprint z-reads
* Stock level audit
* Stock sales overview
* Overall stock value with ability to group by categories

Reporting

* Report that shows current stock and sales over selected date range
* Ability to report on sales/ stock with any date range

System Administration

* Discount/no sale/refund reporting
* Transaction/tender reporting
* Variance reporting
* No minus report
* Audit trail
* Offline/emergency Till
* Report scheduler
* Product categories and styles
* Data import/bulk uploader
* User activity reporting

### Events

As well as our permanent charged for offer and special exhibitions we run a variety of ticketed events, across a number of departments. This could be anything from Pond Dipping with 10 participants, an evening event with 500 or a Family Rave with 2500 people.

They can be free, charged for or even a combination of both. It is important we have a slick way of adding a voluntary donation to these events, as many are not eligible for Gift Aid.

* We need maximum flexibility in how these function, with the potential for dynamic pricing, early bird offers.
* It is important that free tickets can be have sub categories for reporting purposes.

### Memberships

The main aim of the Membership section is to generate income for the Horniman. This is achieved through efficient database management, the delivery of appealing events and benefits, and promotional communications. Most new Members join directly at the Museum by Direct Debit and are attracted by free annual admission to exhibitions, Aquarium and Butterfly House.

Membership Management

* Day-to-day management of the membership database, with the ability to manage multiple membership levels and benefits
* Ability to sell, renew, and manage memberships on the e-commerce platform, including direct debit sales and gifts
* Link multiple customer records to one membership i.e. joint or family memberships, allowing all linked accounts to benefit from the membership
* Lapsed period as standard to allow seamless continuation of memberships should the member be late in renewing
* Auto-renewal process
* Ease in changing prices and integrate into communication and finance
* Set-up member-only events and record attendance
* Payment processing and integration with Finance department
* Ticketing rules – messaging to remind about the membership benefits during booking process

Reporting:

* Ability to produce custom reporting and business insights
* Sales and booking history reports

Data Migration

* Able to import current membership details and history with no interruption to membership

### Direct Debits

We migrated to AUDDIS in October 2020. Direct debits are greatly important to the management of our membership scheme, with 89.5% of our members paying via this method. At present, joining members submit their details via a paper form. We would like to migrate to completely paperless system before 2022.

* Able to process ADDACS, AUDDIS, and ARRUD
* Ability to edit Direct Debit batch with changes before it is submitted
* Able to update individual records when direct debit payment has been received, cancelled or failed
* Ability to validate account numbers and sort codes.
* Ability to pause direct debit instructions i.e. payment holidays
* Able to process paper and paperless direct debits and link those instructions to membership
* Encrypted bank account storage

### Fundraising

We currently have approximately 50 Benefactors who give monthly and annually, ranging from £20 per month to £5,000 per year. We have ambitions to grow this number. We need a CRM system which is be able to create individual records with core name and address data, record contact preferences, capture and claim gift aid and process these Benefactor membership payments by a range of payment methods. We also want to be able to capture and link other forms of support to these Benefactor records, e.g. donations, fundraising event participation and legacy pledges or In Memoriam gifts, and be able to see where a Benefactor has held a previous ordinary membership and traded up.

This year alone, we have received hundreds of individual donations, mostly from new donors. We need the database to be easy to use as each donor and donation needs to be recorded and this means all new donors have to be manually set up with core data and payments recorded and processed as well as gift aid declarations and claims.  Each donor and donation has to be recorded according to where it has come from so we can measure the success of various campaigns and what it is for – so we need the ability to record restricted and unrestricted donations.

Benefactors and In Memoriam donations attract VAT, other forms of support do not. We need to be able to set up forms of support for both VAT and non VAT.

Most importantly, our team will use the CRM as a fundraising log; attaching funding applications (successful and unsuccessful), donations, stewardship (emails, letters, invites, and approaches), etc. We need to be able to pull reports easily to show fundraising income and stewardship plans and have the ability to segment the data in multiple ways.

Alongside a monthly Benefactor and Supporter newsletter and a quarterly Ambassador update, we are also running several fundraising initiatives (Great Walrus Tea Party, London Road Tree Planting Appeal) and will be expanding this to new ideas in the future. We need the system to work seamlessly with all mailings across the different campaigns. We would like to be able to build these campaigns on the CRM so that we can log all donors, payments, etc. to each campaign.

To meet our requirements for fundraising the solution must have:

Benefactor and Donation Management:

* Day to day management of Benefactor and donation database
* Ability for Benefactor memberships to be purchased and renewed via the e-commerce platform via credit card and direct debit payments and ability to split payments to different appeals or forms of support
* Portal for Benefactors to manage their membership on-line and to book Benefactor only events
* Ability to record funding application and outcomes
* Ability to capture Gift Aid declarations and produce Gift Aid claims
* Ability to record a wide range of forms of support – e.g. legacy pledges, in memoriam gifts, fundraising event participation and to create new fundraising products some of which will attract VAT and some not
* Ability to create campaigns or appeals, restricted and unrestricted gifts
* Donations, memberships, and ticket booking to be recorded on the same customer record, thus giving us a full overview of the donor’s or prospect’s history with the Museum
* Integration with e-communications system
* Integration with ecommerce platform to allow donations through this platform, one-off, reoccurring and ticket donations, which are automatically recorded against the customer record
* Ability to create distinct fundraising campaign donation widgets/forms
* Donation no more than 3 clicks

Security:

* Ability to restrict access to high profile donor records to authorised users

Reporting:

* Booking and supporter/donation history
* Reports on all forms of support, including new donors and benefactors reports, with the ability to filter by purchase path i.e. e-commerce or counter​ Financial reporting
* Ability to link with finance/Sage to automatically update when a grant is received

### Gift Aid

Gift Aid is an important form of revenue for the Museum, therefore it is important that the system fully supports Gift Aid processing, including all operational and statutory reporting requirements.

* Ability to record gift aid against eligible membership purchases and renewals, which must include the flexibility to stipulate whether the individual donation or membership is eligible
* Gift Aid Declaration form available, on both the client and e-commerce platform, for all qualifying transactions and one which is receptive to donors' prior selections
* An intuitive pop-up reminder if an Gift Aid eligible membership is sold or eligible donation is taken at the ticket desk
* Ability to communication confirmation of Gift Aid declarations electronically, i.e. order and membership confirmations. Also the ability to include a printable confirmation on tickets.
* Audit trail on customer accounts of their Gift Aid history, including the ability to switch from pending to a claimed status
* Ability to run the Gift Aid report, in a HMRC R68 compatible format, monthly, quarterly, and retrospectively

### Marketing

Responsible for planning, implementing, monitoring and evaluating all marketing and communications campaigns. In particular, promoting programming and commercial activities and raising awareness of the Horniman with the overall aim of extending and diversifying our audience reach and generating income.

The department also co-ordinates and shares visitor research for planning, funding and evaluation purposes.

To meet our requirements for marketing the solution must have:

* Ability to track and report on sales driven by online advertising
* Flexibility to use ticket offers, booking code, and complimentary ticketing
* Automated/triggered mailing based on purchase and attendance; tickets, events, exhibitions, memberships etc.
* Integration with e-communications system, currently MailChimp, or the ability to send out email marketing
* Mailing preferences, recording, and tracking.
  + Default must be opt out
  + Able to record contact method; email, mailing, or telephone
  + Able to record interest, with the core options being marketing and fundraising
* Full suite of booking history and sales reports, and data extraction.

### Learning

#### Schools Learning

The existing Schools Booking System was custom made around 7 years ago, with additional functions added in 2019. It currently holds around 7,000 records, and is used to store organisational and teacher details, allocate and edit a wide-range of variable session information, monitor invoicing, produce customisable reports, and to send auto-correspondence based on customisable rules.

All bookings are currently made via email enquiry or over the phone, then inputted manually by a dedicated Schools Booking Assistant. We do not currently have a booking form on the website. To reduce admin, it is essential that the CRM can send auto-correspondence based on set rules, and incorporates a teacher’s web portal with live information about their booking.

To meet our requirements for Schools Learning the solution must:

**Internal/staff:**

Record Administration:

* Allow for the separate, manual creation and editing of new and pre-existing school and teacher contact information, with the ability to link the relationship between these records and see a full booking history for each contact
* Allow users to search, filter, order, and group data based on a wide array of conditions. For example by session, year group, date of last booking, federation, borough, and teacher (originating booker)
* Mass-import schools data from other databases, internal and external
* Add reportable custom fields or attributes to a school record, such as Free School Meals and Pupil Premium percentages, which can be made mandatory

Account Management:

* Anonymise records after a set number of years for GDPR purposes
* Ability to change the key contact/teacher on a school’s record without losing booking information on that school record which is linked to the outgoing teacher
* Ability to reset each teacher’s web password via the client

Bookings and Ecommerce:

* Booking calendar & top level view
  + Ability to view, edit, duplicate, flag, delete and filter bookings for a particular day
  + Ability to quickly see free/available session slots
  + Auto colour-coding to show booking status that can be manipulated manually, or auto-generated when teachers confirm through their web account page.
  + Free-type notes field that can be attached to each day
  + Allocate resourcing to each booking (staff, room etc.)
* Booking card
  + Single page created at point of booking that can be updated later. Add/select free-type and pre-defined fields including: session time and type, contact information, status, lunch slot, room, exhibition, predicted and actual pupil numbers etc.
  + Suggest school exhibition entry slots based on live availability (taking into account public bookings)
  + Search and select existing person/organisation data, or create new records through booking card at point of booking, and set auto-email/marketing preferences.
  + Store/edit information used to generate invoices including: discounts, additional ‘products’ (exhibition entry etc.) change pricing based on number of pupils.
* Ability to add dismissible pop-up messages to booking process to notify staff of:
  + Specific criteria, mandatory fields, clashes with other workshops
  + Rules attached to the session based on the booking’s attributes, i.e. age group, allocated booking space etc.

Reporting

* Customisable dashboards showing key reminders, data, KPIs etc.
* Customisable reports that can also be exported in different formats, i.e. Excel, PDF, CSV, etc.
* Ability to identify incorrectly formatted or missing data
* Integrate external survey results (currently generated separately through Survey Monkey)

Finance

* Ability to search for and highlight uninvoiced and/or unpaid amounts and add notes
* Save copies of generated and issued invoices against the school’s record
* Integration with Sage200 to allow the automatic generation and recording of invoices

Auto-Correspondence

* Ability to edit email templates and pre/post auto-correspondence rules with ease
* Ability to attach PDF documents
* Store and report a full history of all auto-generated emails

**User Experience (teachers and schools):**

Private web accounts, with auto-generated log-in sent by email immediately after booking, with the following functionality:

* Teachers
  + Manually confirm bookings, and add essential notes (SEND pupil information etc.) that automatically updates the record status/information within the booking system
  + View live information about upcoming bookings
  + Manage contact details, preferences, passwords
* Schools/schools account contact
  + View all upcoming and past bookings made separately by teachers within the same organisation
  + Manage key contact information

#### Family and Community Learning:

Administration

* Ability to administer and report on; number of children, ages of children, ward data (targeting postcode/borough), and monitoring and demographic data
* Ability to import data with information about areas
* Ability to attach more documents; photo consent forms, safeguarding info, PDF resources to tickets/booking confirmation.

Bookings and E-commerce

* Booking of community and care giver group tickets, with the ability to add extra information about people/numbers within that group
* Ability to book free tickets and record the number accompanying adults, babies and younger siblings, both via the client and e-commerce platform
* Pop-up box at point of booking to flag essential requirements (age, access etc.) and information for the booking
* Ability to join mailing list at point of booking- with GDPR statement and interest
* Integration with e-commerce platform with the ability to buy additional resources to go with sessions
* Automatically suggest other events with similar theme from departments
* Ability to put several things into a basket/ purchase multiple tickets for different events in one go.

Security and safeguarding

* Protect information that pertains to vulnerable adults or young people.

### Finance

The finance team comprise of four members of staff and we process financial transactions for the Horniman. The core activities are raising sales invoices, processing supplier invoices and producing management reports.

* As part of HMRC’s ‘Making Tax Digital’ initiative we are required to integrate our CRM system with our financial system, Sage200
* Ability to record VAT against retail items and applicable memberships
* Financial reporting to allow for daily, monthly, and yearly reconciliations
* Financial auditing to track any adjustments made to financial transactions

### Systems Administration and Security

* Ability to restrict access to customer records and information based on account attitudes i.e. schools, young people, etc.
* Security application which can be easily administered by Horniman staff
* Encrypted bank account and credit card information
* Data management function which can be customised to suit the Museum’s needs. For example, rules and scheduling to prevent accidental merging
* Read-write access to the SQL Server Database to be granted to authorised Horniman staff
* Ability to schedule jobs and reports, including auto-emailing of scheduled reports
* Test environment to allow Horniman staff to test any changes prior to applying them to the live environment. A process must be in place to request a live to test copy

## IT Requirements

The Horniman Museum and Gardens have a variety of database systems currently in use. We are seeking to reduce this overhead but we also recognise that not one database will suit all our needs.

### Hosting Platform

As with many organisations, the COVID pandemic saw the majority of our office-based staff move to working remotely from home. We envisage this will continue to be the norm for some time. We are therefore are keen to explore the possibility of moving our CRM system to a hosted platform, one which should be:

* Accessible from anywhere and allow secure connection via the majority of operating systems and web browsers, including Apple and Microsoft products
* Must be PA-DSS certified and PCI compliant
* Able to function on laptop, PC, and mobile platforms (tablets and smart phones)
* Able to meet a variety of accessibility requirements
* Two-factor authentication security
* Easy to access and use

### Operating Requirements

On site, the system will be required to work in the following environment:

* The client side application should run on Windows 10 operating system
* System to be accessed via Google Chrome or Microsoft Edge
* Membership cards validated Datatech Joya Touch 6 scanners
* Card payments processed by MasterCard using PDQ Verifone VX820
* Should the system require hosting on our own platform, we have the capacity to run on a virtualised environment any Windows or Linux –based operating system/server. Memory, Processor and disk requirements will be accommodated accordingly.

The system will be required to do the following:

* Integrate with Microsoft Active Directory service
* Store data in a SQL database and grant the Horniman full access to this data, thus being allowed to run queries and stored procedures (both custom and standard)
* Have an Application Programming Interface (API) to allow third party or other Horniman applications to interact with the system

## Other Services

### Data Conversion

The Horniman will need to convert existing contact and membership records and transactions to the new system.

Sample data will be provided at the earliest opportunity to enable data mapping and conversion to take place.

The supplier will be responsible for extracting data from the existing system (with the help of the Horniman and the current supplier) converting and/or mapping the data as per the Horniman’s requirements.

### System Configuration and Testing

The supplier should expect to be involved in the system configuration and testing stages.

The supplier will provide a consultation service (“Business Process Mapping”) that will allow the supplied system to be best configured to suit the requirements of the Horniman.

Supplier are invited to propose a methodology/process for planning the system configuration and solving all system installation issues.

The supplier will be responsible for installing and configuring the chosen application software and working with Horniman staff as necessary to ensure successful implementation.

The supplier will assist Horniman staff with a range of acceptance testing of the ticketing event and CRM system/software and correct any components that fail to meet the agreed specifications.

### System Training

The supplier will be required to undertake system and user training prior to live operations.

Additional training will need to be given to the nominated systems administrator.

Access to a training copy of the system will be required.

### System Commissioning

The supplier will be responsible for preparing the system for live use.