

Brief for the Bluecoat's Bloomberg Philanthropies Digital Accelerator Project

Digital Change Consultant

£8100 excluding VAT

Scope of the brief

The Bluecoat is seeking proposals from qualified digital strategy consultants with expertise in evaluating charitable technology ecosystems - particularly CRMs, finance, commerce and email marketing platforms. The consultant will conduct a review of organisational processes and how they are served by current, in-place digital infrastructure and workflows. This will result in actionable recommendations for a digital strategy that aligns with the Bluecoat's long-term sustainability goals and ambitious growth strategy.

The Bluecoat seeks a partner who takes a people-centered, holistic approach who will be able to comprehensively understand the art centre's many moving parts across various departments to support organisation-wide systems adoption and long-term digital sustainability. The ideal consultant will considerately engage with the Bluecoat's staff to assess organisational workflows and develop strategic solutions to enhance operational and administrative efficiency.

Overall Digital Accelerator Programme background

Bluecoat's Bloomberg Philanthropies Digital Accelerator Project will embed a new CRM across teams and integrate with key systems, enabling more efficient workflows- through automations and a consistent approach to data, in turn leading to a greater understanding of our audiences and less resource-intensive reporting processes.

Scope of wider Digital Accelerator Programme project

- Scope with GoodCRM and internal teams to review workflows and identify improvements
- Launch GoodCRM internally: train staff, create guidelines
- Purchase and install new hardware to support updated systems and workflows
- Migrate and consolidate existing audience data from older systems
- Integrate GoodCRM with key systems (Event Temple, Xero, Shopify, Mailchimp, Illuminate, ticketing)

- Implement GoodCRM Donations/Membership; migrate from CAF
- Develop decision making tools e.g visualisations

We see this as an opportunity to look at the Bluecoat's wider approach to digital, and welcome recommendations from external consultants for best next-steps going forwards. Alongside the Digital Change Consultant, we are also appointing a GDPR Consultant who will provide advice and support around data protection considerations alongside devising bespoke documentation processes.

Scope of Digital Change project

As part of our wider Digital Accelerator Programme, the Digital Change Consultant will:

Map out the Bluecoat's key processes

Work with the Bluecoat's teams who will use the new CRM (provisionally: Marketing, Development, Business Development, Trading: up to 15 staff) to map out key processes and identify pressure points - e.g. annual reporting periods and regular monitoring and evaluating processes; produce a report examining the Bluecoat's processes.

Design optimised workflows

Examine the wider workflows across departments including finance, marketing, monitoring and evaluation, ensuring our CRM integration is seamless beyond the technical aspects; the Consultant will make recommendations for optimised workflows to best suit the Bluecoat's staff.

Advise on the creation of an AI Policy

Using collaborative methodology, consult the Bluecoat's workforce to learn how people are/not using AI in their work and develop a set of recommendations towards developing an AI policy, which can be widely published internally/externally.

Devise a roadmap with recommended steps going forwards

Present a roadmap for implementation and steps towards a digital strategy to the project team for the Bluecoat to become more digitally agile.

Proposal Requirements

- Executive summary
- Consultant background and relevant experience in charitable organisations' digital strategies and process optimisation
- Approach and methodology for discovery, analysis, and roadmap development
- Proposed project timeline with key milestones within timeframe given below
- Proposed budget breakdown
- References from 1-2 past clients who can speak to consultant's experience with similar projects

Selection Criteria

Proposals will be evaluated based on:

- Demonstrated expertise in charitable organisations' digital strategy and assessments, with experience in CRMs and finance systems. Current systems in use at the Bluecoat include: GoodCRM (currently integrating as part of the wider project), Event Temple, Xero, Shopify, Mailchimp, Illuminate, ticketing platform (currently TryBooking), Google Suite
- Understanding of nonprofit operational and technical challenges
- Ability to conduct independent, objective assessments using a tech-agnostic approach that prioritises needs over specific platforms or vendors
- Commitment to a people-centered, holistic approach
- Demonstrated dedication to diversity, equity, inclusion, and belonging in their approach and working relationships
- Competitive pricing and value for service

Timeline

- Proposal Submission Deadline: 12pm Friday 24 April
- Consultant Selection + Contracting: 15 May
- Project Begins: 25 May
- Project Ends: 30 Sep

How to Submit

Proposals should be submitted to Callan Waldron-Hall at development@[thebluecoat.org.uk](mailto:development@thebluecoat.org.uk). We look forward to receiving your proposal.