



CRM Scoping Consultant

Art UK Capacity Building programme

About Art UK

Art UK is an art education charity on a mission to make the art in UK public collections accessible to everyone – for enjoyment, learning and research. It enables a global audience of five million people a year to learn about the UK's national art collection by digitising artworks and telling the stories behind the art. In addition to innovative engagement tools such as Tagger and Curations, Art UK is currently working on new initiatives including a major learning programme, making this a truly exciting time to join the organisation. Art UK is the operating name of the Public Catalogue Foundation, a charity registered in England and Wales (1096185) and in Scotland (SC048601). For more information, please visit artuk.org.

Art UK's Capacity Building programme

Art UK is looking to improve its financial resilience and sustainability by increasing regular funding and diversifying our income sources, supported by increased staffing capacity and external consultancy.

Our ambition is that this programme of activity will enable Art UK to become more resilient and adaptable, particularly to changes in funding, and be better able to provide a high-quality experience that meets our users' needs.

It is an exciting time for Art UK and a critical period of development, with two major initiatives (Museum Data Service and Superpower of Looking) being launched that will supercharge our audience growth. We are also planning to redevelop and relaunch the entire Art UK platform over the next two years to better meet the needs of our growing audience. These developments will provide a growing range of opportunities for public engagement, which will be maximised through a comprehensive and fully integrated CRM system.

This project will take two years, with consultation and development work taking place in year one.

CRM Systems

Art UK uses a wide-range of CRM systems to communicate with and record information about users and external partners, including Mailchimp, Donorfy (donation database) and an internal database. Each of these systems is siloed, making integrated communications and centralised storing of communication details and preferences challenging to manage.

Art UK's eventual ambition is to commission a new CRM system or set of compatible systems to improve management of personal data, maximise opportunities to communicate with our different user groups, and to provide more personalised experience for each of them. The commissioning of a new system is outside of this brief and will be subject to further funding applications.

CRM Scoping Consultancy

Art UK is looking for a consultant or agency who can help us to identify all of our personal data needs, leading to the creation of a requirement specification for an appropriate solution which addresses all of our varied needs. This will be used for further funding applications and commissioning.

The consultant will be required to:

- Carry out an audit of existing Art UK CRM and CRM-like systems
- Meet with all departments involved in external communications and personal data processing to understand varied needs
- Understand and recommend how Art UK can better link contact records across its various systems and suggest a potential rationalisation of existing systems
- Provide Art UK with a clear sense of the potential marketing and user benefits that might be reaped through a well-designed CRM solution
- Produce a requirement specification for a new CRM system or set of systems appropriate for Art UK's varied needs in consultation with Art UK staff

The consultant must have:

- Strong familiarity with all major off-the-shelf CRM systems and selected custom-built solutions
- Experience in creating a requirement specification for CRM systems for charities and/or heritage organisations
- Excellent IT skills
- First-class written and spoken communication skills and the confidence to engage effectively with a range of people
- Self-motivation and reliability

Proposal to Tender

The consultant's proposal to tender for this work should be no longer than four pages of text (not including a CV, which can also be attached).

The tender should include details of:

- A methodology explaining how the brief requirements will be delivered
- The relevant experience and competency possessed by the consultant and other personnel who will work on the project
- Previous experience relevant to this contract – examples of at least two specific projects should be cited giving reasons why this experience is relevant. Demonstrating any experience of similar National Lottery-funded projects would be desirable.
- Two references from clients of similar work
- Information on the consultant's professional indemnity insurance

Please send your tender to recruitment@artuk.org by 9am on Tuesday 26th March 2024. Interviews will be held via video call on 4th and 5th April 2024.

Payment terms

The budget for this work is £7,500 (+ VAT), inclusive of expenses.

Payment dates will be agreed with the appointed consultant or agency.

Appointment Terms

The consultant will be appointed for six months in the first year of the project.

About The National Lottery Heritage Fund

As the largest dedicated funder of the UK's heritage, The National Lottery Heritage Fund's vision is for heritage to be valued, cared for and sustained for everyone, now and in the future as set out in the strategic plan, [Heritage 2033](#). Over the next ten years, the Heritage Fund aims to invest £3.6billion raised for good causes by National Lottery players to bring about benefits for people, places and the natural environment.

The Heritage Fund helps protect, transform and share the things from the past that people care about, from popular museums and historic places, our natural environment and fragile species, to the languages and cultural traditions that celebrate who we are.

The Heritage Fund is passionate about heritage and committed to driving innovation and collaboration to make a positive difference to people's lives today, while leaving a lasting legacy for future generations to enjoy.

Follow @HeritageFundUK on [Twitter](#), [Facebook](#) and [Instagram](#) and use #NationalLotteryHeritageFund www.heritagefund.org.uk