

Culture Recovery Fund – Membership Marketing Consultancy

INVITATION TO TENDER

1. Introduction

Following a successful bid to the Culture Recovery Fund we are seeking a marketing consultant to enhance and expand our membership marketing activities. This will include analysing our present membership data and reviewing the potential market as well as generating new marketing ideas.

2. Who we are

The [Institute of Conservation](#) is a charity working to raise awareness of the cultural, social and economic value of caring for heritage. As the professional body for conservators, we champion high standards of conservation. Comprising about 2,500 individuals and organisations, our membership incorporates not only professional conservators and conservation scientists, but many others who share a commitment to improving understanding of and access to our cultural heritage. Most of our current members are UK-based, although 17.5% are based abroad.

Further information about Icon can be found on the following webpages on our website:

- About us: <https://icon.org.uk/about-us>
- Icon's Strategy 2017-22: <https://icon.org.uk/about-us/icon-strategy-2017-2021>
- Icon's impact: <https://icon.org.uk/about-us/icons-impact>
- Icon members: <https://icon.org.uk/about-us/support-icon/being-an-icon-member>
- Conservation Register: <https://www.conservationregister.com/>

The membership team consists of Michael Nelles, Head of Membership and Isabelle Pintado, Membership Officer. The membership team works closely with members of the professional development team, who are responsible for promoting accreditation to Icon members, stakeholders, and members of the public.

Further information about our [staff and their roles and responsibilities](#) is available on the Icon website.

3. Background

Icon has not previously invested in marketing, even though increasing our membership, and selling additional and/or enhanced products to existing members, is a key route to raising our unrestricted income and building future financial resilience. We have limited professional marketing skills and experience in-house though the membership team has produced an outline *Membership Growth Strategy*, which was endorsed by the Board of Trustees in September 2020.

We have also been hampered by a lack of understanding of our existing membership data, partly as a result of our long-time use of a membership database with limited functionality, and its lack of integration with other platforms such as ticketing websites and mailshot systems. This technical barrier will be addressed by the commissioning of a new membership CRM (ReadyMembership) which will go live in February 2021, but we also need to implement a fresh approach to monitoring and reporting on our membership data. In essence, we need to establish routine systems to convert our data into information, and information into insights that will inform strategies that generate results.

We understand that for membership to grow sustainably there must be a value exchange between what the membership gets from Icon and what Icon gets from its members.

4. Aims of the project and measures of success

This work will directly help Icon to deliver one of its five strategic objectives for 2020-2021: **Income generation – developing our membership growth strategy and seeking new sources of funding.**

This project will build on the work that we have already undertaken this year to create the new Membership Growth Strategy. Together these two strands of work will:

- provide a better understanding of our existing members and our membership profile
- generate more effective messaging about membership benefits and other Icon products (such as our Conservation Register)
- offer a clearer understanding of the potential ways that we can grow our membership and increase sales of our other products
- deliver more co-ordinated marketing activities that generate better results
- enhance our ability to analyse and gain insight from our membership data
- ensure that the membership team have the tools to implement the *Membership Growth Strategy* and *Marketing Action Plan* effectively

In terms of the overall goals of the project we have set ourselves the following success measures:

- Analysis of membership data and product sales over the medium term will show that there is an upward trend.
- Successful marketing strategies will be mainstreamed into our operational activities.

We will assess our success in achieving our aims through analysing quantifiable data and measuring our impact. If our actions are successful, we will be able to deliver our overarching goal of increasing our membership numbers, leading to growth in our unrestricted reserves and a financially secure future.

5. What we are seeking

We expect the successful consultant to investigate and analyse our existing membership data and review the potential market for new members in order to make recommendations about how the membership team should target their marketing activities in order to deliver membership and income growth.

This will include:

- Providing a comprehensive breakdown and analysis of Icon's current membership:
 - Member profiles and segments
 - Membership data and trends
 - Identification of data gaps
- Providing an external review of the performance and effectiveness of our membership categories and, in particular, reviewing scheme options and making recommendations for supporter and retiree/Emeritus member categories.
- Proposing a robust but straightforward methodology for monitoring and reporting on membership data to ensure that we understand membership trends better in the future.
- Providing a review of the addressable market for Icon's current membership categories and evaluating the present market penetration at all membership levels. As a guide we perceive our addressable market to range from the broad church of the conservation professions (e.g. stonemasonry, object conservators) to the small scale regional or specialism-specific networks (clock restorers, conservation blacksmiths) presently missing from our membership.
- Identifying and analysing potential competitor organisations (those who represent potential membership overlap and may be threats or potential partners) in the UK and internationally, and determining Icon's relative position. Examples range from [IIC](#) and [AIC](#) at an international level to [BAPCR](#) and [BAFRA](#), which are smaller specialism-specific organisations.

- Making recommendations for areas of growth opportunity based on the membership analysis, and identifying any related areas of risk.
- Highlighting marketing “quick wins” that we have not already identified and assisting us to hone and prioritise our *Membership Growth Strategy* and *Marketing Action Plan*. Suggestions should complement and enhance the actions already identified.
- Proposing a simple but effective model to support the setting of annual membership acquisition targets, forecasting of membership income and ongoing monitoring.

6. Key Deliverables

We are seeking a package of deliverables that includes the following:

- A detailed report with clear and actionable recommendations and accompanying success measurement approaches. The report should set out:
 - the findings of the research carried out and the conclusions reached in relation to the activities outlined above
 - summary of any further development needs in relation to Icon’s marketing activities and the implementation of the *Membership Growth Strategy*
 - recommendations for further Icon skills development and training for Icon staff (i.e. in-house commercial skills that will allow us to implement the membership marketing ideas)
- Slide deck highlighting the key messages and recommendations
- Presentation to Icon’s Management Team (late March 2021)

7. What we are looking for

The successful consultant will have:

- extensive experience in membership marketing, particularly for cultural heritage organisations
- an understanding of the operating environment for charities of Icon’s size and type
- familiarity with professional membership bodies and their business models
- demonstrable experience of creating and developing sustainable membership growth strategies
- ability to support staff to implement membership and product marketing action plans

The consultant must also have the skills and resources necessary to complete the work and agree to work within the timeframe stipulated.

Evidence of all insurances (Employers’ Liability, Public Liability, Professional Indemnity etc) will be requested before the project commences.

8. Information sources

- Membership Survey 2019 (will be provided at project inception)
- Membership Growth Strategy (will be provided at project inception)
- Membership Marketing Action Plan (will be provided at project inception)

9. Staff resources

The Project Manager (and main point of contact) will be Michael Nelles, Head of Membership. The Project Sponsor will be Sara Crofts, Chief Executive.

10. Budget

The budget for this project is fixed at £8,500 ex VAT including all fees and expenses. The payment schedule will be 50% at project commencement and 50% at completion.

11. Commissioning process and timetable

Activity	Date
Invitation to Tender published on the Icon website	11 December 2020
Responses to questions or requests for further information will be posted on the Icon website and updated regularly*	NB: The Icon office is closed from 18 December 2020 until 4 January 2021
Closing date for Tenders to be received	12 January 2021
Notify suppliers who have been shortlisted (maximum 3)	15 January 2021
Shortlisted Consultants will be invited to a short clarification meeting (virtual)	27 January 2021
Appointment of Consultant and decision communicated to unsuccessful tenderers	28 January 2021
Project inception / commencement	3 February 2021
Project completion. All work must be completed, deliverables signed off and invoices paid by the end of financial year	31 March 2021

**If you have any queries or comments about anything in the invitation to tender, please email Michael Nelles (mnelles@icon.org.uk). We will respond to queries through a 'Question and Answer' section on the [Icon website](#). In the interests of fairness and transparency we will not respond individually to queries.*

12. Your proposal

In compiling your tender submission please describe how you will respond to our brief and meet our project objectives.

Please also include the following information:

- Summary of the project team with brief CVs i.e. who will lead the project and who else will be involved, plus any sub-contractors
- What the project process looks like and how long it will take, including a chart showing tasks, milestones, payment points etc.
- Outline risk register
- Case studies (3 maximum) from previous clients who have commissioned similar projects

You should send your proposal in PDF format to Icon's Chief Executive (sara.crofts@icon.org.uk) to arrive no later than 1200 (noon) on 12 January 2021. The subject field of your email should state **Tender for Membership Marketing – 12 January 2021. Only tenders received in this format will be valid. All tenders received after the deadline will be disregarded, as will tenders which the tenderer wishes to amend after the closing date.**

13. Selection criteria

We will use the following criteria to evaluate the tenders that we receive:

Relevant skills and knowledge	25%
Demonstrable understanding of Icon and project requirements	15%
Quality of proposed approach to meeting the project requirements	40%
Allocation of resources	20%

14. Intellectual Property and Data Protection

Details of our copyright requirements can be found in Appendix 1. Our requirements regarding the protection of Icon data are defined in Appendix 2.

15. Contract

Icon will offer the successful bidder a Contract which will include this Invitation to Tender (including the Appendices) and the Consultant's Proposal with any variations agreed between the Parties. This Contract shall be the entire contract between Icon and the Consultant with respect to the business development consultancy project and shall over-ride any terms and conditions adopted by the Consultant for other business and shall supersede, cancel and replace all prior agreements, negotiations and discussions between the parties relating to the consultancy project.

Appendix 1: Copyright, intellectual property rights and related matters

1. The Consultant and/or others associated with the publication shall not disclose any material obtained or produced for the purposes of this Contract to any other party unless Icon has given prior approval in writing.
2. The Consultant shall provide to Icon copies of all material and data collected specifically for the fulfilment of the project brief and indicate the source of other material used.
3. Icon will, except where specifically agreed otherwise own the copyright subsisting in the project deliverables. Consequently, the Consultant hereby assigns to Icon by way of present and future assignment all right, title and interest in and to the project deliverables.
4. The Consultant may for its own publicity purposes reproduce any design of Icon in the Consultant's own publicity material including its brochures, catalogues and advertising material provided that these designs are not altered in any way and provided that the Consultant obtains Icon's prior written approval (not to be unreasonably withheld) in respect of each specific reproduction.
5. If at any time any claim is brought against Icon alleging that use or possession of any Product infringes any right of a third party (a "**Claim**"), the Consultant shall indemnify Icon against any and all losses, damages, costs, liabilities and expenses (including legal expenses) arising out of or in connection with such Claim.

Appendix 2: Confidentiality and Data Protection

Icon's [Data Protection Policy](#) is available on our website.

- 1.1 The Consultant shall not divulge to third parties matters confidential to Icon without Icon's explicit permission.
- 1.2 Except where specifically agreed otherwise, all material, data, information collected through the Website during the course of the Contract will remain the property of Icon and must not be used by or on behalf of the Consultant without Icon's permission.
- 1.3 For the purposes of the Appendix:
 - 1.3.1 "**data controller**", "**data processor**", "**personal data**", "**process**" and "**processing**" shall have the meaning set out in Directive 95/46/EC of the European Parliament and Council or any superseding legislation; and
 - 1.3.2 "**Personal Data**" means personal data under the control of Icon and processed by the Consultant under this Contract.
- 1.4 Icon and the Consultant acknowledge that in relation to the Personal Data Icon is the data controller and the Consultant is the data processor. The Consultant must be registered with the ICO Registrar as a data processor or be able to demonstrate legitimate exemption from this scheme.
- 1.5 The Consultant shall process the Personal Data only to the extent, and in such a manner, as is necessary for the purposes of delivering the Service and the Website Services in accordance with this Contract and in accordance with Icon's instructions.
- 1.6 The Consultant shall not:
 - 1.6.1 disclose any of the Personal Data to third parties except for the purposes of this Contract, to comply with a statutory duty on the Consultant or an order of a court or official regulator;
 - 1.6.2 subcontract the processing of the Personal Data without the prior written consent of Icon, provided that where consent is given the subcontractor is appointed by a written contract in respect of the Personal Data which includes terms that are substantially the same terms as clauses 1.3 – 1.9 of this Appendix;
 - 1.6.3 transfer any of the Personal Data from within the United Kingdom or the European Economic Area to outside the European Economic Area without the prior written consent of Icon, and where Icon consents to such processing, the Consultant shall enter into a data transfer agreement with Icon relating to such transfer, including the standard clauses approved for the purposes of Directive 95/46/EC for the transfer of personal data to processors or data controllers (as applicable) in third countries that do not ensure an adequate level of protection, as set out in Annex to Commission Decision 2010/87/EU (for transfers to processors) or Commission Decision 2004/915/EC (for transfers to data controllers) and comply with any reasonable instructions and requirements notified by Icon to Consultant; or
 - 1.6.4 perform its obligations under this Contract in such a way as to cause Icon to breach any of its applicable obligations under the Directive 95/46/EC of the European Parliament and Council, the UK Data Protection Act 1998 or any superseding legislation.

1.7 The Consultant shall:

- 1.7.1 take reasonable steps to ensure the reliability of its employees or agents with access to the Personal Data and to ensure they have an appropriate level of competency in handling personal data;
- 1.7.2 ensure that all of its employees or agents with access to the Personal Data are informed of the confidential nature of the Personal Data and comply with the obligations set out in this Appendix;
- 1.7.3 implement appropriate technical and organisational measures against unauthorised or unlawful processing of the Personal Data and against its accidental destruction, damage or loss, having regard to the state of technological development and the cost of implementing any measures, and the measures must ensure a level of security appropriate to the harm that might result from unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the Personal Data;
- 1.7.4 provide a written description of the technical and organisational methods employed by the Consultant for processing Personal Data (within the timescales required by Icon); and
- 1.7.5 cooperate with Icon in monitoring compliance with this clause and allow Icon on reasonable notice to inspect its facilities for the purpose of ascertaining compliance.

1.8 The Consultant shall:

- 1.8.1 immediately notify Icon if it becomes aware of any complaint, notice or subject access request in respect of the Personal Data;
- 1.8.2 promptly provide Icon with any information it reasonably requires to meet a subject access request or to respond to an enquiry or investigation by the relevant data protection regulator; and
- 1.8.3 comply with any reasonable instruction of Icon to achieve compliance with the directions of the relevant data protection regulator.

1.9 On termination or expiry of this Contract, the Consultant shall stop processing the Personal Data and return and/or destroy it at the request of Icon.