Scottish Book Trust CRM Development

Invitation to tender

August 2017

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Introduction

This document was prepared following consultation with staff across Scottish Book Trust and is intended as a guide to the key requirements for the new Scottish Book Trust CRM. It is not a complete and detailed list of every requirement for the project or prescriptive.

The intention is to provide enough information to allow you to put forward a recommendation based on the best possible fit for our needs.

While we have researched available CRM systems, we do not have a preferred system for this project. We are open to both open source and commercial software, but are keen to minimise the amount of bespoke development work required to ensure we have a stable, easy to maintain and upgrade platform that can be primarily managed in house.

In addition to tendering for a CRM system, we are simultaneously tendering for a new website. The CRM and website must be fully integrated to allow for effective programme participation and data management. You are invited to tender for either the website or CRM, or for both the website and CRM contracts. If tendering separately, the appointed suppliers will be required to work closely with the website contractor to deliver the system, and it may be useful to also read the website invitation to tender to fully understand the scope of the current projects. If you do not have a copy of the website invitation to tender, or require further information please email sarah.barrie@scottishbooktrust.com or call 0131 524 0189.

Background and business objectives

Scottish Book Trust (SBT) is a charity that changes lives through books, reading and writing. A love of reading inspires creativity, improves employment opportunities, mental health and wellbeing, and is one of the most effective ways to help children escape the poverty cycle.

We:

- give free books to every child in Scotland to ensure all families can share the joy of books at home and to lay the foundations of literacy.
- work with teachers to inspire children to develop a love of reading, creating innovative classroom activities, book awards and author events.
- work with adult learners to tackle social issues and help to improve literacy skills.
- support Scotland's diverse writing community with our training, awards and writing opportunities.
- bring a range of author events to the public including Book Week Scotland.

We work towards a Scotland where everyone has an equal opportunity to thrive through literacy.

To support us in achieving our aims, we are looking to introduce a CRM to support all areas of the charity.

The key objectives of this project are to provide a system that:

- manages contact details and communications across all SBT teams, with multiple permission levels;
- allows the administration and management of key programmes to take place within the CRM as much as is practical;
- can manage and administer online donations, from the donation itself to the communication with the donor and reporting income against targets;
- allows all fundraising activity and communications to be managed from one location;
- allows extensive reporting of SBT's contacts and programmes, with report generation handled in-house;
- can be integrated with the new Scottish Book Trust website to allow users to participate in SBT programmes online;
- allow participation of contacts in SBT's projects to be tracked;
- can be easily modified and developed in the future, allowing additional SBT programmes and team to use the system, without requiring extensive reconfiguration or development.

These objectives will be further developed during the project discovery phase once a tender is accepted.

Scottish Book Trust has five key programme teams, supported by a Marketing team and an Operations team. We currently have 47 members of staff, and once the CRM has been implemented, we expect all staff to be using the system as part of their day-to-day workflow.

Our reach as a charity is nationwide, and we increasingly rely on digital means to ensure that people across the country can access our services and to position SBT as a charity. We require a stable, easy-to-adapt platform that can grow with us in the most cost-efficient way possible.

Existing systems and data

The current Scottish Book trust website CMS is Drupal. This Drupal system manages the front end of the website and also has a number of bespoke modules that administer key programmes including Live Literature and Schools touring.

In addition to contacts held on this system that are required to be exported and reimported into the CRM, there is also a significant amount of contacts being held on spreadsheets across the organisation.

The Early Years training team are also using a standalone Access database to manage their processes, which will also be replaced by the new CRM.

In addition to our main website at scottishbooktrust.com, we currently have two additional websites managing our teen writing programme and the First Minister's Reading Challenge (FMRC). The FMRC website in particular contains a significant amount of programme management and data, and while it is not within the scope of this phase of the project, it should be considered when proposing a system to us. We want to bring these sites under the current system as part of a second development phase, and would hope to work with the supplier(s) appointed for phase one to also manage phase two.

SBT will be undertaking a major data audit and cleansing process over the next nine months to prepare the data we hold across all of these platforms for import into the new system and to ensure compliance with GDPR.

Expectations

We expect any solution proposed to use will:

- integrate effectively with the Scottish Book Trust website to allow users across Scotland to easily participate in SBT's digital projects;

- be easy to use for staff of all technical abilities, with a user-friendly and intuitive interface;

- have a clearly identified support and maintenance structure;

- have a clearly identified roadmap for future development;

- have the ability to be updated, upgraded, extended, modified of further integrated in the future, without reliance on a single supplier;

- be, as far as possible, an "off the shelf" solution requiring a minimum of bespoke development work;

- have a clear licensing model and defined ownership rights with regard to custom development;

- come with bespoke training and full written documentation.

Phasing and timeline

The start date for the project should be as soon as possible after the contract is awarded (September 2017).

We anticipate that this project will be delivered in phases, and will work with the appointed agency to identity the project roadmap and delivery schedule. However there are a number of areas with a higher internal priority. We anticipate fundraising being one of the first teams to use the system, along with the transfer of the projects that exist on the current system to allow us to phase out the use of the old system.

While we recognise that this is a large development project as well as an extensive business change for SBT, and that the final timeline will be dependent on a number of factors, we are keen to be able to transition as fully as possible to both the new website and CRM within 9-12 months.

This agreed delivery schedule will be used to agree the project and payment milestones.

Users and Permissions

At full capacity, we are likely to have around 50 users who will require access to the system at any given time. This is likely to change over time and we would prefer a system that allows us the flexibility to increase and reduce the number of licenses we need as required.

Permissions

The system must have configurable permissions that can be managed in-house going forward.

During system set up, permissions should be configured to allow users access to only the business data required for their role.

In addition, we will have staff with overall responsibility for system management and configuration. These staff will have global access to monitor and manage the system, develop advanced reports for teams and configure new elements of the system.

Integration with third party systems

We currently use a number of external systems to support our programme delivery, and the system should be capable of supporting integration with third party applications to ensure that the data collected on those systems is reflected as fully as possible on SBT's CRM.

We currently use the following external systems; however we are open to changing services used if there is a better tool available for integration:

Mailchimp

https://mailchimp.com/
Mailchimp is currently used to deliver our eNewsletter, along with some additional mailings where we have explicit opt-in permissions. We wish to continue to use Mailchimp to manage our eNewsletters, and need to be able to manage mailing permissions and bounces directly from the CRM, with records automatically being update to the latest information.

Eventbrite

https://www.eventbrite.co.uk/
SBT currently use Eventbrite to organise some external events. These include workshops and conferences, as well as some of our Early Years training events. We would like to be able to import attendee data automatically and to sync event data between our CRM and Eventbrite.

JustGiving

https://www.justgiving.com/
While we need to be able to securely accept and process donations directly through our website and CRM, there will still be some fundraising activity around JustGiving. We need to be able to sync this information into the fundraising element of the CRM.

Submittable

https://www.submittable.com/

We currently accept applications to some of our writing programmes via Submittable. While we may eventually seek to bring this in-house, Submittable is industry standard and is an effective tool to manage these processes in the meantime. We need to be able to sync applicant data between Submittable and the CRM and track programme participation for writers who apply via this third party tool.

Surveymonkey

https://www.surveymonkey.com/

Evaluation is a major part of all of our programmes, and we conduct a large volume of user surveys with Surveymonkey. While some of these are anonymous, many are not, and we would like to be able to integrate and manage the data collected from Surveymonkey.

Online payments

At present, the only parts of our programme that will require the ability to make payments online are online donations and booking for some events (e.g. Bookbug conference) However, we are currently investigating alternative funding routes. One of the possibilities involves online sales, whether merchandise or possibly packaged versions of our programmes for an international audience. Any website and CRM system that we introduce must have the ability to introduce ecommerce without significant development being required.

Supporting processes

SBT are looking for a CRM system to allow better management of a range of currently disconnected contact groups, and to support us in streamlining our programme management, as well and managing fundraising workflow and donations. The CRM will be a crucial tool in being able to efficiently manage communication and reporting.

We deliver a range of programmes, some of which are detailed below. This is by no means a prescriptive list of SBT programmes/activities and requirements, but gives an overview, of how programmes are currently delivered and broadly speaking, the functionality required from the new system in order to deliver these programmes / activities.

We have mapped out the work flow of five of our processes in Appendix 1-5. These illustrate the current steps that staff need to go through in order to deliver the program. This has been a valuable exercise and we expect that with the new CRM we will be able to streamline these processes and allow more efficient delivery.

In giving a broad view of functionality required we recognise that many CRM's have specialist functionality and so are very much open as to how our methods might adapt to work with an out-the-box feature, as long as our core processes remain.

Fundraising, Sponsorships, Trust & Foundations

As a charity, we rely on donations and funding from individuals, companies, trusts and foundations, as well as Creative Scotland and the Scottish Government. We currently use JustGiving for online donations and manually manage our donations and supporters.

Functionality required for Fundraising

- We need to store contact information, history of relationship, actions and donation history securely
- Functionality to set up follow up actions and longer supporter journeys (eg call this person after two weeks, send this email)
- We need to record online donations from our website (attached to existing supporter or create a new record for a new donor), record offline donations (cheque, bank transfer etc) and record Gift Aid information
- Ability to automatically send personalised thank you emails to those who donate online
- Facility to record offline payments, corresponding communications and easily generate personalised thank you letters and emails
- We need to manage fundraising events
- Facility to record legacy pledges
- A facility to record all the trusts and foundations that SBT could apply to, all the applications that we then submit and the outcome
- API integration with JustGiving (eg links to a supporter who sets up a JG page, or someone else sponsors an SBT supporter through JG and wishes to hear from us)
- The flexibility in the future to develop:
  - Campaign management
  - a tool to manage a 'donor club' and associated supporter journey and have the ability to develop fundraising further eg manage volunteers.

Bookbug Training

We deliver 11 free CPD training courses to support our network of early years practitioners to ensure stories, songs and rhymes are part of every baby and young child's life. These courses are delivered across Scotland's 32 local authorities by our trainers, with circa 350 courses reaching 3,700 attendees on an annual basis.

Overview of how Bookbug training is currently handled

Training requests are received in email or via a local authority contact from individuals and organisations (tracked on an Access database). When there is enough interest for a course, a date is set – this is either open for any relevant individual to book on (currently handled via Eventbrite) or is a closed session, with bookings usually handled by the organisation hosting the course. A close check is kept on bookings to determine appropriate actions and if the event can go ahead. Detailed checks are completed and communications sent to the trainer, organiser and known bookings before the event.

At the event, each trainee is required to complete a paper attendance sheet and the trainee is asked to complete feedback. Attendance is entered into the Access database. All trainees are later sent a thank you email with resources. A more detailed flowchart of this current process can be seen in Appendix 1.

Functionality required for Bookbug training

- Need to know a person is applying for Bookbug training
- Need to know who our trainees are, whether they are on a waiting list for training, booked onto training, attended training, or cancelled / no show
- Need to know all training dates arranged, whether the date went ahead or cancelled (with reason)
- For each training date need to know in which local authority, the venue, date and time, the principal trainer and the back-up trainer
- For each training date, need to know who is booked on and ultimately all those who attended or cancelled / no show
- Need to see what emails have been sent and preferably, (the ability to send standard emails or integration with MailChimp)
- Ability to set up alerts, for example:
  - as the number of bookings reaches maximum capacity
  - those training events where numbers are below minimum capacity

Live Literature Author Database

SBT has an online directory of circa 750 authors in Scotland who have a range of skills / experience and are available to carry out Live Literature events to schools and communities. Authors listed on our database are paid a set fee of £175 and are reimbursed their expenses when they carry out these events. Authors living and working in Scotland can apply to join the database at any time.

Overview of how applications for the Live Literature Author Database are currently handled

An author applies by email, attaching their CV. If they meet the criteria, the author is sent forms to complete for inclusion in the database. Returned profile information is moderated by SBT until both parties agree and the information is made live on SBT website along with links to relevant author books. If an author later requires updates to their profile, they email the changes which again go through a moderation process. A more detailed flowchart of this current process can be seen in Appendix 2.

Note: this is known as the "Live Literature Database"; however we intend to change the name, mostly likely to "Live Literature Directory".

Functionality required for the Live Literature Database

- Need to know a person has applied to be a Live Literature author
- Need to know the status of their application
- Need a record of communications
- On acceptance need to know status of their profile application
- Need to hold a record of the public facing information which links directly to the website (and should be very clear that it is as such)
- Need to know the date of when a person is live on the Live Literature Directory and the date that they eventually cease
- Need a record of participation in programmes as a result of being a Live Literature Author
- Need to be able to allow an author a facility to input their profile information directly online, which is then moderated by SBT, and may go through iterations before being made live to the public. We would also like to discuss the feasibility of having a facility for also granting permissions to an author's agent to manage this.

Live Literature programme

The Live Literature programme works with organisations (schools/libraries/book groups etc) to bring an author from the SBT Live Literature database into their community. Each year, over 1,000 Live Literature sessions take place across Scotland with a total estimated audience of 50,000 people. SBT invoice the organisation for a set portion (£75) of the author's fee, with the other portion of the author fee and expenses covered by SBT.

Overview of how applications for Live Literature are currently handled

Applications for sessions are made via the website for Live Literature session(s) before a bi-annual deadline (circa 175 applicants per programme). A panel assesses the application against set criteria and award session(s) as appropriate. Decisions are recorded and all applicants are emailed feedback regarding their application. Successful applicants organise their session(s) themselves with their chosen author. The organiser informs SBT when they arrange a session and this is recorded. The organiser completes a claim form when the event takes place, and passes this onto the author. It is then the author's responsibility to complete the rest of the form and send it onto SBT so that they can be paid. SBT pay the author directly, including any expenses, and invoices the organisation for the set fee of £75. A more detailed flowchart of this current process can be seen in Appendix 3.

Functionality required for the Live Literature Programme application (LL)

- Need to be able to set the programme year and phase, and to have this recorded against applications, and to set the number of sessions available in the given phase
- Integration with the online application form
- Need a record of the fact that a school (via a contact) has made an application for LL session(s)
- A user-friendly way to compile applications to send to panel
- Need a facility to upload results of applications into the CRM along with accompanying feedback and number of sessions awarded
- Need a record of the result of the application, and number of sessions awarded
- The facility to email results to the applicants along with feedback
- A record of communications having gone out
- Need to track dates of sessions and authors used, payments that have been made to authors, invoices sent to organisers and payment received back
- As sessions are used need an alert to identify those who are on their penultimate session and those who have used up all their sessions

Scottish Friendly Children's Book Tours

The Scottish Friendly Children's Book Tour takes the very best UK and international authors directly into schools across Scotland and the UK to inspire a love of reading, writing and illustration. Every year we go on 6 tours; four in Scotland and two in England visiting a vast range of different communities, from rural schools with an 8 pupil roll in Mouswald to 400 seat theatres in Glasgow. We reach an average of 6,000 children every year, taking 3 years to visit all 32 local authorities in Scotland.

Overview of how the Scottish Friendly Children's Book Tour is currently delivered

The planning of a tour starts 1-2 years in advance. Criteria is worked through to decide location of upcoming tours. When a tour is confirmed, tour dates and author are set in the system. A tour normally lasts a week and has ten sessions available (a morning and afternoon session for each day of the week). The website is updated with tour information and the online application is made available. Publicity for the tour goes out to those in that locality in email. Applications to host the tour come in from the website and a panel assess these based on set criteria. The location of each applicant is manually mapped out in Google Maps. Successful applicants can only be granted one session and are emailed their confirmation, information on resources and free books are sent. A more detailed flowchart of this current process can be seen in Appendix 4.

Functionality required for in the Scottish Friendly Children's Book Tour

- When a tour is confirmed, need a record of that tour (year, month, author, age group, local authority) and the sessions available
- Integration with the online application form

- Need a record of the fact that a school (via a contact) has made an application for a tour
- Need an ongoing record of the status of an application
- Need a more user-friendly way to compile the pack of applications which is required for each panellist
- A facility to upload results of application along with accompanying feedback and date/time of session awarded
- It would be good if the postcode from the application could be directly mapped out
- The facility to email results to the applicants along with feedback
- A record of communications having gone out
- A record that the school participated, an approximate number of pupils, of the evaluation received back from the organiser and star rating from pupils
- A record that the author participated in the tour
- The flexibility for future development to record resources and quantities ordered

Voting for the Bookbug Picture Book Prize (BPBP) & the Scottish Teenage Book Prize (STBP)

Every year, three books are shortlisted for these two awards and publicity goes out to schools and libraries. For BPBP, all Primary 1 pupils in Scotland are gifted the three shortlisted picture books in their Bookbug Primary 1 Family Bag. Voting is available until a set deadline and then the winner is announced

Overview of how voting for the prizes is currently delivered

The two prizes run to different timelines, and are independent of each other. An online form is amended with the current three shortlisted books for that prize and publicity goes out to the relevant audience. Schools, nurseries and libraries can then register their intention to make a group vote, and this is recorded in the database. Before the deadline they can cast their votes against each of the three books listed for the award, again this is recorded in the database. As the deadline approaches, those who have not yet cast their vote are emailed / phoned to remind of the deadline. For BPBP, a parent can also participate by sending in a postal slip to cast their child's vote or by voting online through a separate webform.

Functionality required for Voting for books

- An online voting form listing the three shortlisted books, made live on the Prize launch date and deactivated at the Prize closing date
- Professionals should be able to register in advance and give a predicted number of votes that will be cast from their group
- When it comes to casting votes, professionals need to input the number of actual votes for each book from their group
- A record of the fact that the school participated (and that the person who cast those votes participated)
- For BPBP individual votes, the number of children they are voting for and then the number of votes per book
- For STBP individuals votes, the book they are voting for
- The ability for SBT staff input numbers based on paper votes received

- After closing date, a permanent record of votes cast per book and the winner

Writing Awards

Scottish Book Trust offer many writing award programmes whether it be in cash, receiving professional mentoring, writing retreats. Eligibility criteria for each award is prescriptive, some applications are via email and some via Submittable. All applications are considered by a panel made up of SBT representatives, stakeholders and associated professionals. For some awards, applications are anonymised before being considered by the panel.

Overview of how applications for Writing Awards are currently delivered

This is largely handled via Submittable, or manually for smaller programmes, and then data is kept via spreadsheets.

Functionality required for Writing Awards

- We need to know who applies for an award and what the result of that application is
- We need to be able to list all the different awardees and link them back to the original award
- Integration with Submittable

Events

The CRM should be able to handle the set up, management and booking processes for events delivered by SBT and, while the majority of events provided by SBT are free, it should have the ability to take online payment for events where required.

We have two types of events:
- Public events open to the general public for booking with a freely shared and publicised booking link
- Private events where only those users with the link should be able to book a place. This is mostly used as part of our Early Years training

Functionality required for Events

- Venue management
- Event invitations and promotion
- Creation of invite lists, with multiple contributors
- Management of RSVPs
- Ability to contact delegates before and after the event.

Finance

We use Sage for financial management and while integration with our finance package is not included in the scope of this project we would like to be able to consider integration of the CRM and finance systems at a later date.

Contact Groups and Entities

Included here are two diagrams to list, at a broad level, our contact groups and the types of records that the system should manage. This is not a complete representation and at this stage we have not listed the fields required as we would expect all this to be defined when we go through a thorough requirements gathering process with the appointed supplier.

Diagram 1

This diagram depicts eight broad contact groups, giving some examples of who might be in that contact group.
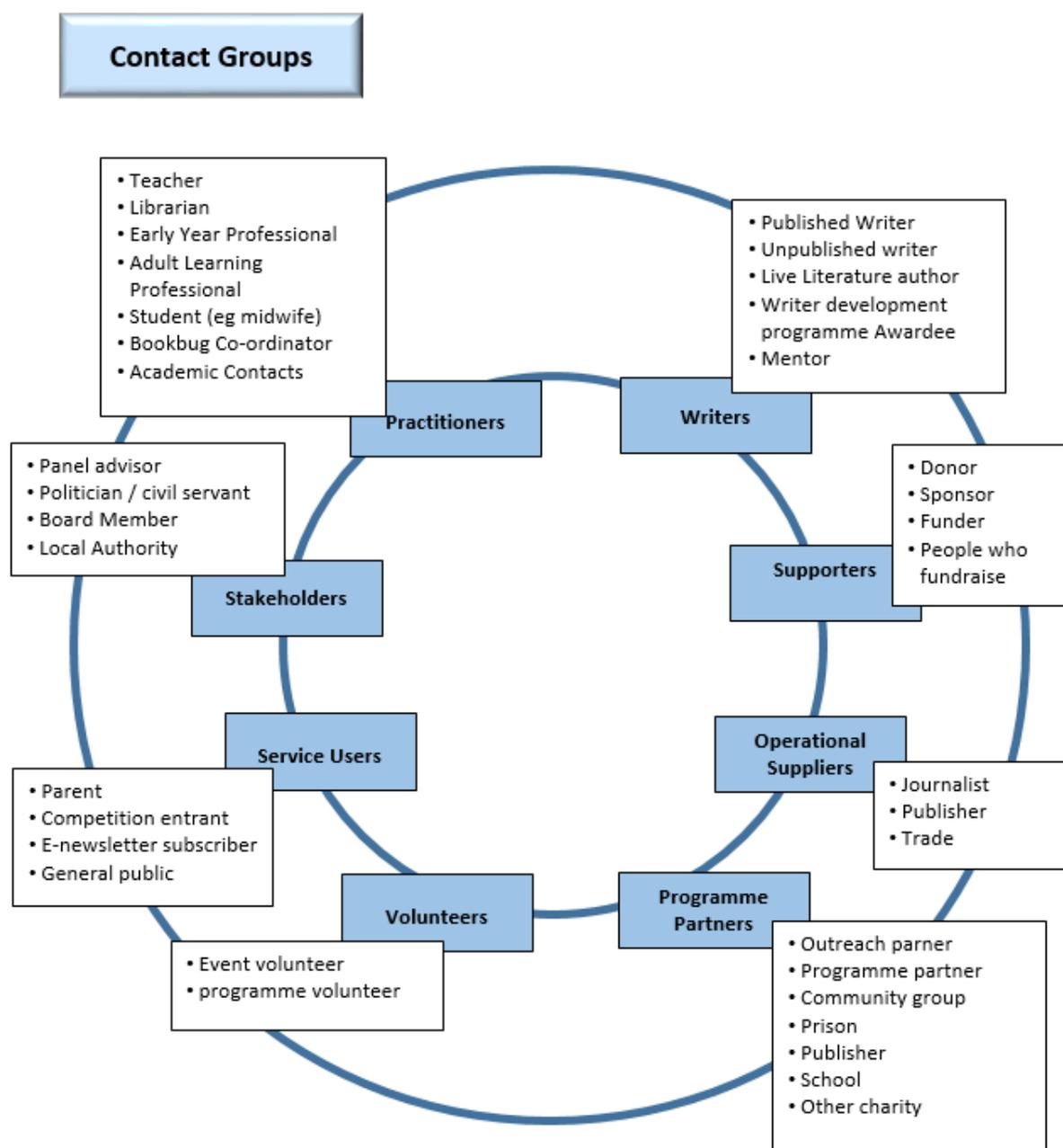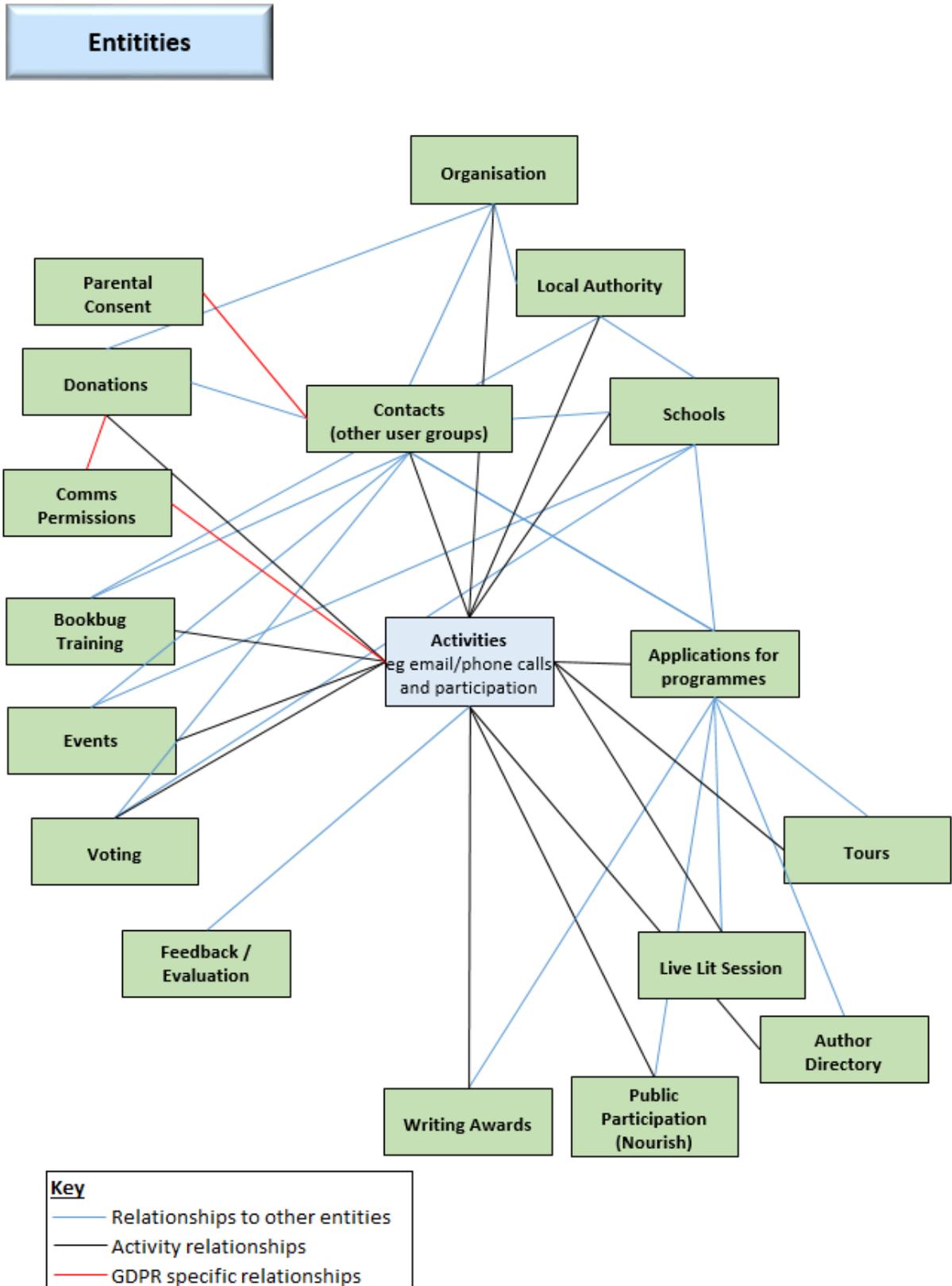
Diagram 2

This is an entity relationship diagram of the records that would be managed by the system

General requirements

Along with the functionality detailed under "Supporting Processes", the following general requirements should be considered in your response back to us:

- A system that can be easily modified and grown in the future without requiring extensive re-configuration or development. This would include
  - Adding additional reporting capabilities
  - Adding and changing the fields and data stored against a record
  - Being able to integrate with external data sources and systems in the future
  - Being able to add new record types and relationships
  - Upload of updated address information (eg school addresses)
- Provide a single view of all contact and participation of all SBT programme activities
- Provide extensive reporting and management capabilities of SBT's programme activities
- A method statement on CRM application security
- Applications from schools and participation in programmes from schools should be held against the school record. Also need a link to who made the application and these applications/participation linked to the person. So that if person moves job, record stays with the school but also know the level of participation by the person (this is a problem that we currently have)
- Users to have different levels of access to the system
- Manage internally the staff who have this access
- Traceability of how data is added/amended/deleted ie directly by contact (online) or by which SBT staff user
- The ability to create new contact types
- Ease/integration with Microsoft products eg can easily create mailmerge word documents
- Manage permissions for communications effectively taking on GDPR principals/rules and with regards to fundraising, PECR rules. This would require a clear distinction between service provision communications and fundraising communications
- An exploration of best approach to link a person holding multiple email addresses (usually in different guises eg work email as a teacher, home email as an aspiring author)
- A record of under 16s who clearly have received parental consent

Reporting

The ability to query the system and build reports ourselves is a core requirement for our new system. We would have a minimum of two staff who would be the "super-users" and who would have the correct training and knowledge of SBT's programmes to carry this out. Whilst we can prescribe a standard overview reporting suite of our activities, our funders change on a yearly basis hence the type of standard reports change.

An example of some of the typical reports that we would build are:
- Fundraising income by month

- New supporters by user type, donations by different user type, number of donors, average gift amount, total gift amount
- By local authority, per funding year, training delivered and number of trainees
- For each programme, per funding year:
  - number of applications
  - numbers reached
- Level of engagement in our contact groups
- Equalities data, including SIMD participation

Your response

In putting your response together, we would like you to demonstrate your response to the following criteria:

Overview of the system

Please provide an overview of your proposed solution, including how the system meets the requirements of Scottish Book Trust.

Practical demonstration

We do not expect you to provide a demonstration bespoke to our requirements, however it would be beneficial for us to receive a demonstration of the system you intend to deliver and how it can be configured to meet our requirements. This can be in the form of an in-person demonstration, online demonstration or video demonstration.

Delivery Process

Please outline the process that you will take to deliver the product, from project kick-off to deployment. Please also identify which project management system(s) you would prefer to use to deliver the project.

Website integration

If you are tendering for both the CRM and website developments, please give details of similar projects that you have previously completed.

If you are tendering for only the CRM system and not the website development, please demonstrate how you have previous worked with a separate supplier on project planning and website integration on a similar project.

Licensing costs

For systems with licensing costs, please provide a breakdown of types of licences available, the licenses we will require and the expected costs of these licenses. We expect to need around 50 active licences, though this number is flexible and not all users will need access to the full system and data.

Details of how programme administration capabilities

Please detail how your system will handle the data and processes required to support our programmes as described above.

Please also indicate how additional programmes can be added to the system in future.

Ability for internal management and configuration

We intend that the CRM system will eventually be managed in-house, as far as possible. Please explain the extent to which changes and updates can be managed internally, and where it is likely that we will require external suppliers for support and maintenance.

Details of support and maintenance

Please detail your suggested or required support and maintence levels for this contract. We will require at least 12 months of suitable support following the warranty period of this project. Please detail the on-going costs and how the support will be arranged and managed.

Details of warranty period

We require a fixed warranty period for the project (or for each release of the project) to ensure that any problems in the system can be detected and fixed as part of the initial cost. Please give details of the warranty terms that you will be applying to this project.

Details of third-party integration capabilities

Please detail how the software integrates with other software, including the systems mentioned in the "integration with third party systems" section.

Details of emailing capabilities and Mailchimp integration

Please demonstrate the capability of your system to send and monitor emails, reporting on and updating records in relation to user activity including bounce detection, open and read reporting and click through. Please highlight how a system user can create an email campaign, from content creation to list selection and sending, and how unsubscribes and option out of email communications is handled by the system.

Archiving and deleting data

Please indicate how your system deals with archiving data, and what happens to any reports, figures or datasets that include data which is later archived or permanently deleted for any reason.

Overview of technical and infrastructure requirements

If the system has any specific requirements, such as incompatibility with any operating systems or if the system requires any particular platforms, such as a hosting platform, to operate, please specify these.

Hosting of the system

Please indicate how the system will be hosted, if it will be cloud or server-based and if it requires any particular hosting platforms to operate. If you have any recommended hosting platforms, you may supply a cost for the hosting of the system of a yearly basis, however this does not commit SBT to using your preferred supplier for this system.

Sandbox and test environments

Please specify if a sandbox or test environment can be offered for the CRM, and if this requires additional licenses or incurs additional cost.

GDPR compatibility

The system must meet the requirements of GDPR by May 2018. If your system requires

additional development to meet these requirements, please specify this. Further, the contact that we enter into with the appointed agency, would include the requirements as set out in GDPR regarding data processors.

Your project team

As far as possible, please identify who the key contacts for this project will be within your organisation and the team members who will be working on its implementation.

Case studies of similar projects and contact details for two referees

Please identify case studies of similar projects that you have completed. We also require a minimum of two referees from similar projects that you have worked on. These referees will only be contacted if you are shortlisted for the development.

Awarding criteria

Award criteria	Weighting (%)
Clear understanding and interpretation of the CRM requirements specifications and how effectively the presented solution meets the needs of Scottish Book Trust	30
Relevant expertise and experience of implementing CRM systems, particularly in a charity environment	30
Relevant experience of integrating websites and CRM systems	20
Value for money	20

Project management

The project director for Scottish Book Trust is Moira Findlay, and the project lead is Sarah Barrie, Website Manager. The appointed supplier is will be required to meet regularly with Scottish Book Trust and a regular communications schedule will be agreed.

Please direct all correspondence to Sarah Barrie in the first instance.

Tender deadlines

All tenders should be submitted by 11am on Friday 25 August 2017. Those received before that date and time will be retained unopened until then.

Shortlisted tenders will be invited to face-to-face meetings at SBT's Edinburgh office in the week commencing 11 September 2017.

Budget

A maximum of £60,000 is available for the core implementation of the CRM, including comprehensive contact and organisation records and communications functions as well the set up of the following projects:

- Fundraising
- Live Literature

- Schools touring and events
- Schools book prizes
- Early years training
- Events

We expect the following items to be covered by the budget:

- Full staff training
- Full integration with the new SBT website

Any travel and accommodation costs incurred by you during the project will also be included in the budget and will not be covered separately by SBT.

All figures quoted exclude VAT.

Key contact

The project lead at Scottish Book Trust

Sarah Barrie, Website Manager, Scottish Book Trust

Sarah.barrie@scottishbooktrust.com, 0131 524 0189