**Consumer Insight Toolkit: Draft Overview of Requirements**

Arts Council England is looking for a service provider, consortium or contractor (which may be a joint venture comprising of a number of providers, or a prime contractor that may sub-contract certain elements of the services), to develop and implement a Consumer Insight Toolkit that will provide National Portfolio Organisations and the Arts Council with insight into what audiences, participants, peers, artists and creative practitioners think about the work being produced by National Portfolio Organisations across the 2018-22 investment period.

This document outlines a draft overview of requirements for the provision of the Consumer Insight Toolkit service. There is no guarantee that any subsequent tender will align with these requirements. However, this document represents initial and current thinking and is designed to provide interested parties with a guide to the nature of the services to be provided to inform initial discussions amongst potential suppliers.

We anticipate advertising an invitation to tender for this work in January 2018. Please address any queries to [procurement.services@artscouncil.org.uk](mailto:procurement.services@artscouncil.org.uk)

**Terms of Contract**

Anticipated term of contract: 1 June 2018 to 31 March 2022

Upper budget limit: £2.3 million (inclusive of VAT)

**Brief**

Since 2013 Arts Council England has supported the arts and cultural sector to develop a standardised set of quality metrics and accompanying quality evaluation framework that uses self, peer and public assessment to capture the quality of arts and cultural work. Details of this work can be found [here](http://www.artscouncil.org.uk/quality-metrics/quality-metrics) on our website.

We are now seeking a service provider, consortium or contractor (which may be a joint venture comprising of a number of providers, or a prime contractor that may sub-contract certain elements of the services), to use the principles of the [quality evaluation framework](http://www.artscouncil.org.uk/quality-metrics/quality-metrics) to develop a Consumer Insight Toolkit and support our NPOs to adopt and embed it to help them better understand the impact of their work on the people that experience it.

The service provider will also be expected to support the Arts Council to embed the toolkit within its systems and processes and extract insight from the data collected by NPOs that can help inform progress against our strategy, policy development, monitoring and decision making.

To deliver this service the provider will be required to provide a digital platform that enables NPOs to collect and analyse survey responses from multiple respondent groups and supports aggregation of findings across the portfolio. The provider will deliver training and ongoing to support to NPOs and the Arts Council and work with NPOs and the Arts Council to develop the toolkit to ensure the survey questions, approach and technology work effectively for the wide range of organisations in the national portfolio. The provider will support NPOs and the Arts Council to ensure they can effectively use their findings to inform how they operate. See pages 2-5 of this document for a more detailed overview of requirements.

The service will be provided free to all 831 National Portfolio Organisations that want to use it, however use of the toolkit is only mandatory for the 256 NPOs in bands 2 and 3. The full breakdown is; 66 in Band 3, 190 in Band 2, 530 in Band 1 and 58 Sector Support Organisations. 13 NPOs also have an additional SSO funding agreement. Details of the National Portfolio Organisations are available [here](http://www.artscouncil.org.uk/NPO) on our website.

As a priority the service provider must ensure the 256 band 2 and 3 NPOs are ready to use the service effectively from April 2019. The Arts Council will then open windows in which 200 Band 1 NPOs and SSOs can register for induction at a time. An indicative timeline for this would be:

|  |  |  |
| --- | --- | --- |
| **NPO Registers Interest by** | **Service Provider delivers induction** | **Max number of NPOs inducted** |
| April 2019 | September 2019 | 200 |
| October 2019 | April 2020 | 200 |
| April 2020 | September 2020 | 200 |

As a minimum requirement the provider must be able to support each NPO to complete a minimum of four evaluations per year. An evaluation will be of a specific event, exhibition or performance and would broadly consist of the following minimum components:

* + - a survey enabling quantitative responses to the quality metrics, basic demographic questions and quantitative and/or qualitative responses to an unlimited number of bespoke questions from a range of respondents (self, peer and public);
    - a method that enables NPOs to record their intentions for the piece of work they are evaluating before it has taken place; and
    - a minimum of 3 survey responses from peers, 3 survey responses from self-assessors, an unlimited number of survey responses from members of the public.

As a basic set of principles the solution provided by the service provider should:

* + 1. provide a digital platform that allows NPOs to collect and analyse data from their audiences, peers and staff;
    2. use the standardised [quality metrics dimensions](http://www.artscouncil.org.uk/quality-metrics/quality-metrics) and statements developed by the sector but also put in place an iterative process to work with the sector ensure both that the metrics are refined and extended;
    3. enable organisations to outline their creative intentions and evaluate progress against them;
    4. enable organisations to compare self, peer and public responses to their work;
    5. support benchmarking, enabling an organisation to compare itself against a relevant cohort of organisations (similar size, same types of activities, within geographic area etc);
    6. enable individual outputs to be aggregated for the purposes of analysis and identifying trends and points of comparison across the portfolio or across cohorts within the portfolio; and
    7. ensure the Arts Council has access to the data at aggregate and organisational level as and when it is required

**There are eight core elements to delivering the work:**

**Ongoing development and improvement of the toolkit**

The provider should be committed to working with the sector to deliver ongoing development and improvement of the toolkit to ensure it remains relevant and meets the wide-ranging demands of NPOs and the Arts Council. This will include iterative development of the existing quality metrics and participatory metrics, development of artform specific metrics and wider development of the toolkit to ensure it is appropriate for the wide range of organisations within the national portfolio.

**Developing a culture of peer review amongst NPOs**

A key element of the toolkit is the provision and receipt of peer review. The provider should be committed to working with NPOs and the Arts Council to develop a culture of peer review and systems and processes that support the smooth running of this. This will include supporting NPOs to develop peer review networks and ensuring peers can provide enhanced qualitative feedback alongside their quantitative survey responses.

**Build understanding and support for the toolkit amongst Arts Council Staff, NPOs and the wider Arts and Cultural sector**

The quality metrics work has been in development in England since 2013 but has not been widely used by NPOs since the national trial ended in June 2016. The provider will be expected to develop a programme designed to build renewed support, confidence and understanding for the toolkit.

**Provide and host a digital platform and database**

The provider should provide a fully hosted digital solution that allows NPOs to efficiently and effectively collect and analyse data from their audiences, peers and staff, benchmark and share findings with other organisations and produce reports of the evaluations they undertake. The solution must also enable the Arts Council to access and extract the data of individual NPOs and at aggregate level. The platform should be compatible/interoperable with other data collection systems commonly used by arts and cultural organisations (e.g. box office systems, CRMs, audience profiling systems), compliant with government digital service standards, store and manage data securely and in accordance with UK data protection legislation.

**Data analysis, monitoring and reporting**

The provider should be committed to providing NPOs and Arts Council England with ongoing real time access to data and monitoring information in a range of formats such as datasets, visualisations and dashboards. This will include analytical dashboards for NPOs, the provision of monitoring information to the Arts Council about NPO usage, supporting the Arts Council to develop and run standard and bespoke reports from the dataset and ongoing development of more sophisticated means of exploring and understanding the data.

**Supporting NPOs and the Arts Council to use the toolkit effectively**

The provider should be committed to ensuring the toolkit is as easy to implement as possible and that NPOs and the Arts Council can effectively use the outputs to inform how they operate. This will include supporting NPOs to complete a minimum of four evaluations each year, supporting NPOs and the Arts Council to embed the toolkit within their systems and processes, and producing learning and insight sessions and materials.

**Platform and wider toolkit induction and ongoing training and support to NPOs and Arts Council staff**

The provider should be committed to providing efficient and effective induction, training and support for NPOs and the Arts Council. This will include providing induction and training sessions in each of the Arts Councils five areas, production and dissemination of guidance documents and provision of email and telephone helpdesk support.

**Alignment with Audience Finder**

Arts Council England supports all NPOs to use an audience profiling, insight and support system called Audience Finder, run by the Audience Agency operating under a separate Arts Council contract. This system also uses audience surveys as part of its approach to capturing a range of demographic data on organisation’s audiences. The service provider should seek to complement and not duplicate Audience Finder. This will include providing joined up advice, developing an agreed way of working that enables both sets of data to be collected and applied effectively and facilitating the cross comparison of Audience Finder and quality evaluation data.

**Indicative Timeline for implementation**

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| --- | --- |
| Task | Date |
| Intended issue of OJEU notice (open procedure) | Early January 2018 |
| Intended date for receipt of tenders | Early/Mid-February 2018 |
| Intended contract award | Early June 2018 |
| Implementation planning | June 2018 |
| Re-engage the sector with the work | July – October 2018 |
| Training for Arts Council super users (around 10 staff) | August 2018 |
| Induction sessions for Band 2 and 3 NPOs and Arts Council Relationship Managers | October 2018 |
| Support Band 2 and 3 NPOs with first evaluations | October 2018 – March 2019 |
| Support Band 2 and 3 NPOs to meet mandatory requirements of their funding agreements | April 2019 – March 2022 |
| Induction sessions for first intake of Band 1 NPOs & SSOs | September 2019 |
| Induction sessions for second intake of Band 1 NPOs & SSOs | April 2020 |
| Induction sessions for third intake of Band 1 NPOs and SSOs | September 2020 |