

## **Trinity ICT Development Brief 2021/22**

**Fixed fee: £4,500**

**Appointment: January to March**

### **Introduction**

Trinity's mission is empower communities through the arts and make sure everyone has the opportunity to access and shape arts and culture in Bristol. The Trinity Centre, this much-loved historic landmark is a cultural hub for the city, where people of all ages and backgrounds can come together - connecting communities and developing people's skills through the arts.

### **ICT at Trinity**

Trinity is an independent, growing and changing charity, community organisation and social enterprise. Our ICT systems are an integral part of our success to date as we have sought to develop systems and processes that meet our needs and those of our customers and service users. We also seek to ensure that the investments we make help to meet our wider charitable objectives. Therefore, we have a policy of using Free and Open Source Software (FOSS) where possible, in order to achieve best value, problem solve, reduce barriers to ICT platforms, share and protect collective resources and better meet community need.

### **Review Context**

Following on from our ICT review, carried out 2018, you will review Trinity's current ICT systems and improvements and make recommendations to ensure our operational activities more effective and efficient, alongside meeting our ongoing commitment to supporting FOSS developments.

We are looking for someone who can:

1. carry out an updated review, assessing our progress to date
2. project manage completion of outstanding/unresolved tasks in-progress (see Appendix 1)
3. recommend further improvements/changes to systems (see Appendix 2) and processes
4. provide costed options where possible against any key recommendations e.g. in relation to any system change and/or outsourcing of a system or process
5. where possible, develop publicly accessible info (code repository, shareable learnings, resources) to benefit other arts/voluntary orgs etc

You will report to:

- Ben Hargreaves – Finance & Office Manager

You will work with:

#### *External*

- HelpIT - Trinity's current external ICT Sysadmin Support
- Circle - external developer of our CiviCRM system
- Quinta - external Plone website developer

#### *Internal*

- Emma Harvey - CEO and website super-user/editor
- Sarah Bentley - Marketing Officer, CiviCRM super-user and coordinating Office365 migration

## Outcomes

- Outstanding tasks completed
- Existing systems, processes/work-flows and support reviewed and documented
- Risk areas, gaps, improvements and/or efficiencies identified
- Final Report to include:
  - Analysis and summation of existing systems
  - Options appraisal, potential solutions and key development areas
  - Costings; including any quotations for services and any potential phasing of investment
  - Recommendations / Next steps

## Identified milestones – work to be completed within two months of appointment

- Commission Consultant; meeting with project team and plot key actions and time-frame
- Review current systems, existing documentation and internal research to understand context, communication with internal users and existing suppliers/support providers
- External research / assessment of options for support / costings
- Review and analysis of options, informing further development / phasing
- End of contract - completion and submission of report, with future risks and recommendations to inform development

## Deadline for application: Monday 20 December 2021, 9am

To apply, outline your response to the brief, including a breakdown of time and approach and fee.  
Email to: [info@trinitybristol.org.uk](mailto:info@trinitybristol.org.uk)

## Trinity ICT Development Brief 2021

### Contractor specification

#### *Essential*

##### Experience:

- Educated to degree level or equivalent, or possess significant relevant professional experience within a similar role
- Demonstrable experience in using and maintaining customer focused databases in a higher education, public sector or commercial environment
- Demonstrable experience of supporting users in their use of IT, electronic information and system analytics
- Experience of mapping processes and identifying opportunities to improve efficiency
- Demonstrable experience in understanding the needs of users and producing data to meet their requirements
- Experience of working within a role that requires effective planning and organisational skills, strong attention to detail and an ability to negotiate, persuade and influence.

##### Knowledge / Skills:

- Proven, transferable IT skills within a wide range of packages and operating systems
- Knowledge of how systems are used and their ability to influence business processes
- Ability to build and develop relationships with a wide range of individuals
- Attention to detail, excellent analytical skills and ability to interpret data
- Ability to work as part of a team, but also have the confidence to work independently including to plan/organise own workload
- Ability to adapt a flexible approach to the demands of a busy, dynamic environment

#### *Desirable*

##### Experience:

- Knowledge of any of the following: Linux, CiviCRM, Plone, Booked Scheduler (formerly PHPScheduleIT)
- Experience working with clients similar to Trinity (i.e. community/arts organisations)

##### Values:

- A warm, friendly, professional and approachable attitude
- Energetic and self-motivated
- Flexibility and an adaptable approach to work
- Support for new/innovative approaches
- An understanding of the values of Free and Open Source Software
- Interest and understanding of contemporary culture and community arts
- A willingness to work flexible hours
- An appreciation and a desire to uphold Trinity's values and ethos
- An understanding/appreciation of the cultural and social landscape of Bristol

## Trinity ICT Development Brief 2021

### Appendix 1 – tasks in progress to be completed

Task area	Task description	Status	Budget
Sharepoint	<p><b>1. Complete migration of internal file system to Sharepoint:</b></p> <ul style="list-style-type: none"> <li>• transfer of required 'Adminspace' (locally hosted file server) folders/files to Sharepoint</li> <li>• standardise file/folder structure/view with relevant permissions clearly defined</li> <li>• communication/ training with Team incl defining roles/permissions to add new users</li> </ul>	Marketing Officer to liaise with Help4IT to see where they are with the project plan and get a report from them to be able to share as part of the specific remit/output we want to happen.	£2,000
Website archive	<p><b>2. Complete setup of archival content on website:</b></p> <ul style="list-style-type: none"> <li>• move existing site to updated version of Plone or new recommend platform</li> <li>• establish standardised content layout of existing site content (events in the archive) into thematic/era structure and/or pulling out featured content tagging past events etc (Plone)                             <ul style="list-style-type: none"> <li>• enable comments on past events (submission for publication)</li> <li>• resolve outstanding issues around viewing unpublished content for those with submission for review content privileges on-going issues that need further investigation</li> <li>• communication/training with Team regarding content creation</li> </ul> </li> </ul>	Marketing Officer has allocated £300 in the first instance to Cusy a company who is able to integrate Plone/CIVI and to do this. This will then mean we have three options of moving the current website to a new platform, either Plone or Wagtail. This could then be externally accessed (as part of updated audit) to what we should do moving forward.	£4,000
CiviCRM	<p><b>3. Complete setup of impact monitoring framework on CRM:</b></p> <ul style="list-style-type: none"> <li>• standardised participant reporting set up (CIVI)</li> <li>• agreed reports setup/ scheduled</li> <li>• staff trained (specifically, projects, duty managers, event team) plan produced</li> </ul>	Infrastructure done but there seems to be a disconnect between understanding/ interpreting needs of departments/functions and clearly briefing Circle to set up the reports. Possible issue around training and/or need for additional super-user role	£3,000

## Trinity ICT Development Brief 2021

### Appendix 2 – summary of existing systems

#### *Background information*

##### Organisation

- Trinity Community Arts is a registered charity with trading subsidiary
- Annual turnover is approx £1m
- We employ 50 staff (20 core/30 casual)
- Core income split approx 50% grant income, 50% net contribution from trading subsidiary

##### Values

- Trinity recognises access to ICT resources, knowledge and skills as one of the biggest social and economic barriers affecting people's ability to alter their economic state
- Where possible, Trinity invests in 'code.3ca' to develop alternative solutions to licensed packages, in order to help communities - including our own and other organisations in the community arts and voluntary sectors - to overcome these barriers

##### Key delivery outputs

- Live events
- Participatory workshops and sessions
- Online events/resources
- Reports (monitoring and evaluation, internal and external)

##### Key measurables

- Attendance/audience numbers/footfall (number of individuals and number of experiences)
- Progression/Skills-development/Distance-travelled (e.g. confidence, well-being, self-efficacy)
- ROI

##### Existing Systems

1. Operating System and Software:
  - Email, Wi-fi and Internet
  - CRM database and ticketing system
  - Bookings and calendar system
  - Finance and HR systems
  - Multi-media capabilities
  - Card transaction processing
  - Phone system

##### CRM (CIVI /Wordpress)

Used for: selling tickets, tracking event attendance/audience numbers, creating cases (e.g. for participants), mailers/external communication, membership.

Gap = lack of standardised monitoring/reporting functions set up/understood.

Need = completion of outstanding development phase.

What won't work = we are not looking for a replacement CRM system.

##### HR (CIVI / My.HR / Quickbooks)

Used for: tracking staff leave/absence, timesheets

Gap = employee 'snapshot', performance management (currently use word doc 'Road Maps')  
Need = something employee led, ap-based, flexible, visual, simple/easy  
What won't work = something overly process-driven, bureaucratic, time-consuming

#### Finance (Quickbooks)

Used for: recording all financial info incl payroll

Gap = budgets created on Excel; no standardised reporting/budget set to QB. Lack of integration between HR.My and QB e.g re leave, timesheets etc

Need = annual budget inputting to QB. Timesheet/leave reporting on QB.

What won't work = additional HR system that doesn't integrate with existing systems e.g. another system for staff to learn, login to remember etc

#### Bookings (Booked)

Used for: Managing external bookings of the space

Gaps = creating reports/analysis of space use. Lack of integration with QB/finance info.

Need = a way of integrating info about event/space use into wider reporting functions e.g. Civi

What won't work = something overly process-driven, bureaucratic, time-consuming

#### Website (Plone)

Used for: public facing content incl archive

Gap = lack of integration with Civi (which needs its own separate Wordpress front-end for ticket sales, membership etc)

Need = completion of outstanding development phase.

What won't work = we are not looking for a replacement website and we are definitely not interested in creating a new Wordpress site.

#### File system (Office365 / LDAP File Server)

Used for: storing internal files and documents

Gap = incomplete migration of file system across internal and cloud system. Lack of clear file structure, permissions hierarchy and general inconsistencies due to lack of internal knowledge/expertise.

Need = completion of outstanding development phase.

What won't work = we are not looking for a replacement file system.

#### Ticket sales (Stripe / CIVI)

Used for: selling tickets and recording income

Gap = lack of integration between Stripe and QB for recording ticket income.

Need = completion of outstanding development phase. Replacement of Stripe with alternative that integrates with QB.

What won't work = we are not looking for a replacement CRM system.

#### Office system (LDAP server)

Used for: desktop logins, internal file system, website login

Gap = multiple logins for LDAP and Office365

Need = improved basic support/trouble-shooting, support hours? Integration.

What won't work = we are not looking for another system. We intend to retain an internal server system/file backup for archive files including images (Graphicspace).



**Trinity Community Arts Ltd**  
**The Trinity Centre, Trinity Road, Bristol, BS2 0NW**  
**0117 935 1200** [info@trinitybristol.org.uk](mailto:info@trinitybristol.org.uk) [www.trinitybristol.org.uk](http://www.trinitybristol.org.uk)