
INVITATION TO QUOTE: October 2021

Beneficiary Data Collection

*There is a kind of love called maintenance
Which stores the WB40 and knows when to use it.
[...] which upholds
The permanently rickety elaborate
Structures of living, which is Atlas.
UA Fanthorpe, Atlas*

Can you help us on our journey to set up the structures we need to better connect with people who experience our Shared Reading groups?

Our goal is to create a simple, scalable, easy-to-use process by which we can collect participant data from volunteer-led groups across the country.

We are looking for an agency or individual who can assist us in the first phase of this work, by helping us to clearly articulate what our future digital solution will need to achieve, to identify how similar organisations are already solving this problem, to outline the barriers this work will need to overcome and to understand from end-users how to best suit their needs.

The key deliverable for this project will be a recommendations report for a future digital solution and collection methodology that we can use to scope and tender for the digital delivery phase of this project.

About The Reader www.thereader.org.uk

The Reader is a national charity bringing about a Reading Revolution so that everyone can experience and enjoy great literature, which we believe is a tool for helping humans survive and live well.

We bring thousands of people together on a weekly basis in small groups to share and discuss great novels, short stories and poems. We call this Shared Reading.

By reading with people in community centres, libraries, care homes, hospitals, prisons, secure units, workplaces and in high street cafes, and at our home in Calderstones Park in Liverpool, our work helps to improve wellbeing, reduce social isolation and build stronger communities.

Before the pandemic, over **700** Shared Reading groups and one-to-ones took place every week around the UK, supported by **1000** volunteers and reaching over **10,000** people a year.

In addition, we run a programme of wider arts and heritage activities with a 'golden thread' of literature running through them at our home in Calderstones Park.

When COVID started, we had to suspend face to face groups, and we set up a range of remote delivery options, including Shared Reading groups over Zoom, Shared Reading 1 to 1 over the phone, Facebook Live readings and 'Lifeline' activity packs with poems and short stories provided to some people. We are now transitioning back to face to face work, and some of our online provision will continue.

In 2020, people attending community Shared Reading groups said:

'I look forward to the group as an important event in my week' - 92%

'The reading sessions make me feel better' - 93%

'I've made new friends within the group' - 84%.

Why is this brief here?

In 2018 we launched our first Digital Strategy, and thanks to a large digital investment from the National Lottery Fund we now have a new website and this year launched a new CRM using Dynamics 365 that will allow us to manage data across the entire organisation and online community hub. This will provide support and resources for our Volunteers alongside a simple way for them to report data to us.

Our long term ambition (in 5 years) is for The Reader to be able to have better, more direct engagement with all individuals who experience our work, whether in a Shared Reading group in a Bristol library, or who attend an event at our building in Calderstones Park in Liverpool, so that:

- We can understand what Reader activities individuals participate in and their individual journey with the Reader (for example from participant to volunteer)
- We can communicate with them to obtain feedback on their experiences and improve our services and reporting
- We can provide information on our work and opportunities at the Reader that is relevant to them, and will ultimately improve their experience with us.

Our assumption is that in the long term, we will be aiming to collect data at scale from participants in our work using digital/online tools, replacing the in person paper based forms that we used before COVID.

Scope of the task

Historically there has been no obligation on our Shared Reading group members to provide personal details, to attend a specific number of sessions, or to attend each and every week (although for each group a dedicated core of weekly group members tends to develop). Names and telephone numbers are usually collected informally and held by the staff member or volunteer leading the group. As we complete our first stage of digital investment we are ready to move to the second stage and improve our beneficiary data collection methods and requirements. A large majority of our community based group members are aged 50+ and whilst we don't have data relating to digital access or literacy, experienced volunteer feedback indicates that we are also dealing with limited digital literacy for many of their group members, or reluctance to engage in online groups.

We already collect standard monitoring and characteristics data such as age, postcode, and disability about our beneficiaries annually through a paper based exercise. This method has suited

us until now. However, over the last few years our Shared Reading network has grown exponentially and our model has moved to predominately volunteer-led, rather than staff-led. This has meant we usually have to communicate with group members through a third party (the volunteer) which makes collecting this data more difficult. It also means that often it's not obvious to our group members that the service is provided by The Reader, and they may be missing out from the full benefits of being part of the Reader community, and struggle to keep connected.

We want to take an initial step during November & December 2021 towards the long term ambition above, and to help clarify the next phase of our digital strategy. We intend to start with focusing on people who attend our Shared Reading groups in open settings in the community (e.g., in libraries).

In practical terms, the aims of this initial project would be:

- 1) Drawing up a clear brief for what our work on group member data needs to solve beyond this initial phase, scoping for short term needs and long-term ambitions by collecting group member data, and how this supports our mission. This will involve reviewing our scoping work to date, and consultation with some Reader volunteers and staff on aims of this work, as well as bringing in an external perspective & ideas on what can be achieved. This should include a recommendation for how this work should be phased to fulfil our long-term ambitions.
- 2) Develop a potential short list of digital solutions & other approaches that could fulfil our requirements: carry out informal research with Tech for Good/other digital networks & digital leads in other charities/organisations that run dispersed activity groups etc. to understand possible ways to collect this information.
- 3) Define what data we should collect (what data is essential, what data would we ideally collect) and how this would feel from a group member/participant perspective, and establish principles for how to collect this data e.g., would this be collected in stages, how would volunteers be involved in collection. This may involve running a workshop with a few stakeholders.
- 4) Develop and test ways to trial collecting group member data (for example on online Microsoft/Google form, QR code approach) with a few volunteers and Shared Reading groups to get feedback on the process and experience for group members, participants' willingness to provide data to enable direct engagement, and the level of data that people are willing to share. Develop understanding of how this data collection process would link to our current digital infrastructure. Reporting on this work should include recommendations on whether the solution developed for the pilot would be recommended for use at scale in the long term, or was used primarily to understand user responses to data collection in principle, and what considerations would need to be taken into account to collect data at scale.
- 5) Identify barriers to data collection (both online groups and for in-person settings), including digital literacy/exclusion for some participants, psychological barriers to providing information in the environment of a Shared Reading group and suggest possible solutions, incentives and behavioural insights that could help us overcome these barriers. We envisage that the challenges will be much greater for in-person groups, and would like to pilot data collection with both in person work and online group settings.
- 6) Identify what is needed to develop tools for data collection that can link to our CRM, and to implement across groups more widely, given the dispersed nature of our model.
- 7) Identify relevant policies, procedures and practices we would need to have in place to implement this work

Who are we looking for to help us with this work?

We are looking for a freelancer or organisation who is likely to have experience of:

- Working with and connections to charities and social enterprises that run community-based activities
- Setting up data collection processes and systems and/or working with digital and design agencies that can do this work
- Running focus groups and collaborative processes in order to design processes with the end user's experiences and needs in mind

Outputs

- Results, learnings and recommendations report which covers the aims above
- The template/form used for pilot data collection and any guidance, including addressing any concerns around sharing data with The Reader.

Budget

The Reader is looking for a partner who can work with us to deliver this initial work, we have a budget of c£5,000 (incl VAT) for this initial exploratory work. We are anticipating that this will be 10-15 days work. Please quote inclusive of VAT, any anticipated expenses and all outputs.

Following this work, there will be an opportunity to apply for opportunities to work with us on the investment, implementation and roll out of the proposed solutions.

Timelines

Brief out	w/c 11 October 2021
Submission deadline	Monday 1st November 2021
Discussions with shortlisted freelancers/staff/organisations prior to appointment.	2-4 November 2021
Project starts	w/c 8 November 2021
Project completion and all deliverables	w/c 13 December 2021 (flexible into January, depending on how work is scheduled)

Submissions

Please submit the following details no later than 1st November at 5pm by email to geetharabindrakumar@thereader.org.uk - submissions arriving after this deadline may not be considered.

- A short summary of your proposed approach to this project
- Confirmation of your ability to complete the task with the time frames outlined above
- Your track record in similar projects and brief bio for you/team members who will work on the project
- The fees/ costs break down for the proposed work including day rates inclusive of all expenses and VAT
- 2 referees from organisations with whom you have worked recently
- Data protection policy
- Proof of Professional Indemnity Insurance valued at at least £1million

All proposals will be assessed for value for money, experience and quality of approach.

The individual/ organisation appointed will be asked to complete a supplier confirmation statement.

Contact

For questions or to arrange a phone call to discuss the brief, please email
geetharabindrakumar@thereader.org.uk

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@thereaderorg #SharedReading

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