

Icon Accreditation Marketing Consultancy

INVITATION TO TENDER

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1. 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 2,300 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://www.icon.org.uk/about-us.html>
- Icon Accreditation: <https://www.icon.org.uk/accreditation.html>
- Icon's Strategy: <https://www.icon.org.uk/about-us/our-work/icon-strategy.html>
- Icon's impact: <https://www.icon.org.uk/impact.html>
- Icon members: <https://www.icon.org.uk/about-us/support-icon/become-an-icon-member.html>
- Conservation Register: <https://www.conservationregister.com/>

Icon Accreditation is led by our Skills team, which consists of Patrick Whife, Head of Skills, Heather Doyle, Accreditation Manager and Chloe Gerrard, Skills Officer. The team work closely with Michael Nelles, our Head of Membership who is responsible for marketing within Icon.

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

2. The invitation

Icon is seeking a marketing consultant to enhance and expand our marketing of Icon Accreditation to professional conservators across the UK and internationally. This will include analysing our present membership data and reviewing the potential market as well as generating new marketing ideas.

3. About Icon Accreditation

Icon Accreditation is the system by which professional conservator restorers' level of practice is assessed by their peers. If candidates are able to demonstrate that they operate at the 'proficient' level, measured against the Icon Professional Standards, they are awarded Icon Accredited status and the postnominal ACR. The Icon Accreditation framework has three components:

- An assessment process for accrediting professional capability against explicit standards.
- A system for ensuring maintenance and enhancement of professional capability through Continuing Professional Development.
- A means of removing ACR status from practitioners who fail to maintain a minimum standard of practice and ethics demonstrated through regular CPD monitoring.

The process is supported by the Icon Pathway membership category which is designed to aid members of Icon on their journey to accreditation. Over 1,000 people have been Accredited members at some point. There are currently 750 Accredited members of Icon.

4. Background

Icon has been successful in securing £10,000 to support the marketing of Icon Accreditation from the Steps to Sustainability programme. £4,000 has been allocated to the development of the marketing plan. The remaining £6,000 has been set aside to deliver the initiatives identified through the marketing plan. If the agreed marketing plan identifies additional consultancy costs, these will be covered from these funds.

Icon Accreditation is our unique selling point – it is one of only three systems of professional accreditation of conservator-restorers internationally. The numbers of Accredited members have remained steady over the past 10 years. However, Icon recognises that to ensure the continued recognition of the standard and the increased financial sustainability of the organisation that the numbers of Accredited members need to grow.

Alongside this project, Icon is also undertaking a review of the method by which Icon Accreditation is delivered to ensure that it is open, accessible and represents best practice in professional assessment.

Icon has not previously invested significantly in the marketing of Icon Accreditation, even though increasing our Accredited 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, although the need to ramp up the marketing of our system of professional accreditation has been recognised as a key priority for Icon's Board of Trustees.

5. Aims of the project and measures of success

This work will directly help Icon to deliver on three of the aims in Icon's strategy: to extend our reach within the UK and internationally, maintain high standards in conservation practice and to strengthen our Institute.

This project will build on the previous work we have already undertaken in understanding the barriers to Icon Accreditation in order to:

- generate more effective messaging about the benefits of becoming an Accredited member of Icon.
- offer a clearer understanding of the potential ways that we can grow our Accredited membership outside of the UK
- develop a clear marketing plan with a mechanism for monitoring and reviewing the effectiveness of marketing efforts.
- deliver more co-ordinated marketing activities that generate better results

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 in the numbers of individuals becoming Pathway members and ultimately submitting applications for Icon Accreditation.
- Successful marketing strategies will be mainstreamed into our operational activities.
- Staff will have gained an understanding of marketing strategy and activities and will be able to continue implementing these

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 the number of Icon Accredited members, leading to growth in our unrestricted reserves and a financially secure future.

6. What we are seeking

We expect the successful consultant to investigate and analyse our existing membership data, previous research, and marketing activities in order to develop a clear and targeted marketing plan that can be implemented by the staff team. This will include:

- Analysis of Icon's membership data and relevant research to produce a clear and concise summary of the size of the potential market for Icon accreditation in the UK and internationally
- Developing a robust marketing plan that can be delivered in the short and medium term.

- One day consultancy support in order to provide advice during the implementation phase.
- Providing a mechanism for reviewing the success of marketing activities.

7. 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; and an action plan detailing the proposed marketing initiatives to take place by 31st March 2023, costs of implementation and measures of success.
- Slide deck highlighting the key messages and recommendations
- Presentation to the Icon staff team.

8. What we're 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.

9. Information sources

The following documents can be provided to those interested in tendering for the project:

- Future of Icon Accreditation (2019)
- Stakeholder consultation on Icon's Advocacy for Icon Accreditation and Professional Standards (2018)
- Icon Strategic Plan (2022)

The following information can be made available on project inception:

- Icon Membership Survey (2022)

10. Staff resources

The Project Manager (and the main point of contact) will be Patrick Whife, Head of Skills. The project Sponsor will be Sara Crofts, Chief Executive.

11. Budget

The budget for this project is fixed at £4,000 including VAT including all fees and expenses. The payment schedule will be 50% at project commencement and 50% at completion.

12. Commissioning process and timetable

Activity	Date
Invitation to Tender published on the Icon website	11 th April 2022
Closing date for Tenders to be received	16 th May 2022
Notify suppliers who have been shortlisted (maximum 3)	19 th May 2022
Shortlisted Consultants will be invited to a short clarification meeting online	19 th May 2022
Appointment of Consultant and decision communicated to unsuccessful tenderers	30 th May 2022
Project inception / commencement	13 th June 2022
Project completion. All work must be completed, deliverables signed off and submitted.	25 th July 2022

If you have any queries or comments about anything in the invitation to tender, please email Patrick White (pwhife@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.

13. 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 who will be doing the work 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 Head of Skills (pwhife@icon.org.uk) to arrive no later than 12:00 (noon) on 16th May 2022. The subject field of your email should state Tender for Icon Accreditation Marketing – 16th May 2022. 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.

14. 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%

15. 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.

16. 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

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.

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.

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.

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.

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 Privacy 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.