LEEDS 2023

DIGITAL ROADMAP

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LEEDS 2023 Year of Culture

Threshold

CONTEXT: A unique opportunity to be bold and inventive

Never in our recent history has culture and the arts been so critical to the health, wealth and well-being of our communities. The impact of Covid 19 has indeed challenged all walks of life striking at the core of how we operate as a society at both a hyperlocal and global level. Alongside this, has been the need for our work to reach audiences, support our talent and help our villages, towns and cities navigate this unknown terrain and unlock the potential of technology as part of our toolkit to do this.

At national policy level, the new vocabulary around "an inclusive recovery" or "levelling up" recognises the importance of culture to achieve this. The recently published Arts and Placeshaping: Evidence Review May 20201 commissioned by ACE demonstrates how arts and culture can drive change. Leeds 2023, combined with its vibrant and diverse communities and talent, is a unique opportunity to lead from the front in its ideas, principles and programmes, setting best practice models on how to deliver an ambitious cultural programme in this new environment.

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01 OBJECTIVES

- Leeds 2023 aspires to ensure **digital is fully embedded and integrated across the Artistic, Operational and Communication functions** and ambitions of the organisation.
- The **main components** of this **Digital Roadmap will be a Digital Operating Model and a Delivery Plan** alongside a series of recommendations for its successful implementation.
- **The Digital Roadmap will:**
    - Draw on **best practice and learnings** from across the sector.
    - Be fully **aligned to Leeds 2023 priorities** and objectives ensuring people are at the heart of the approach acknowledging the barriers aswell as the opportunities
    - Identify all the **required resources, processes, data and systems** to support all areas of the Leeds 2023 organisation and delivery. For example, covering website and intranet solutions, CRM and ticketing, data management and reporting, audience engagement planning, and artist commissioning frameworks.
    - Be **agile and adaptable** enough to respond to the changing environment as well as new opportunities.
    - Have a **clear structure** to work to and establish a digital operating model that has buy in from the Executive team.
    - Set out a **delivery timeline** including KPIs to articulate and measure progress and success.
    - Define a **shared vocabulary** to be readable across the marketing, operational and artistic teams.
    - Identify a **recruitment** plan to achieve the objectives and secure the right team.

02 INTRODUCTION TO THE LEEDS 2023 DIGITAL ROADMAP

- What it is: The Digital Roadmap identifies the **'Digital Capabilities'** that are required to support the needs of key stakeholders.
- The Digital Capabilities are translated into a **Digital Operating Model**, which is a blueprint for how Leeds 2023 will work.
- The purpose of the Digital Roadmap is to ensure the Leeds 2023 organisation design **fully embeds digital into everything it does**.

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03 DIGITAL VISION & PRINCIPLES

WHAT IS DIGITAL

- When it comes to talking about digital, we need a common language.
- Firstly, digital is an adjective, not a noun or a verb.
- Being ‘Digital’ describes how you think, how you behave, what you value, and what drives decisions in your organisation.
- These definitions make it very hard to decide how to be ‘more digital’!

- However:
- DIGITAL IS NOT about just moving your existing processes online, as there’s a limit to how many benefits you can gain from doing that.
- **DIGITAL IS about designing the way a business works by optimising the culture, practices, processes & technologies of the digital-era to respond to people’s raised expectations.**

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DIGITAL MATURITY…

- A Digital Maturity Model helps organisations to have a conversation about their digital journey.
- The full model (see Appendix A) describes observable characteristics and behaviours of organisations at different stages of digital maturity across the organisation.
- The following diagram highlights a ‘tipping point’ between digital maturity levels 2 & 3 where an organisation transitions from being analogue by design to digital by design.
- At level 3 and beyond organisations redesign their services to align to their customer/audience needs.
- You can use the full model to think about where you are today as an organisation and also personally and where you want to be.

Digital Maturity Model

Use this model to assess where you are and where you want to be on your digital journey

Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Offline	**Digital Channels**	**Digitised Services**	**Digital Services**	**Digital Organisation**	**Born Digital**
Using Mainly manual paper based process	Using digital channels but not digital end to end	Offline processes have been ‘digested’	Processes have been digitally redesigned	The organisation has been redesigned to work digitally	The business model is digital first

The digital Orginaistaion

Analogue by design | Digital by design

The digital journey

Evolution	Transition	Transformation
Change happens organically	Change through specific projects	Change through orginisation wide design

LEEDS 2023 DIGITAL DESIGN PRINCIPLES

What are design principles?

- **They are guidelines for how we want to do things like:**
  - Create
  - Communicate
  - Work & Collaborate

Creating these principles starts with the Digital Maturity Model plus:

- **Our Brand proposition: ‘experience the extraordinary in the everyday’**
- **Our Values:**
  - We are compassionate
  - We are bold
  - We are inventive
  - We are confident

On the next slide there are a set of Digital Design Principles that the Leeds 2023 Executive Team discussed on December 10th 2020.

LEEDS 2023 DIGITAL VISION & DESIGN PRINCIPLES

DIGITAL VISION: Digital is fully embedded and integrated across the Artistic, Operational and Communication functions and the ambitions of the Leeds 2023 organisation.

How we will work	What we mean
1. We will all share the responsibility for Leeds 2023 being 'digital'.	No one is 'Head of Digital'; Digital is fully incorporated into all our roles and thinking and not an after-thought.
2. We will create a best practice model for a Digital City of Culture.	We will optimise the role and opportunity of digital technology in everything we do.
3. We will ensure that the digital and physical co-exist.	Digital is not separate; it is seamlessly integrated and part of a blended experience.
4. We will embrace simple and elegant solutions and avoid over-engineering.	Our solutions will be fit for purpose, light-weight, simple to use and aesthetically pleasing.
5. We will use audience data and insight to make decisions.	Audience data will be available and accurate for fast decision making and for measuring our success & impact.
6. We will be audience-centric in designing our products and services.	The audience (user) experience is central to our thinking in designing our organisation, processes and systems.
7. We will use digital to help us be transparent, open and collaborative.	We will aim to share our thinking as well as our outputs and invite others to comment and collaborate. We will keep things simple and accessible for everyone to understand.
8. We will be a learning organisation.	We will be experimental and iterative and sometimes get things wrong and that's ok as long as we learn.
9. We will design our digital infrastructure with an exit strategy.	It will be straight forward in 2024 to maintain, retire or hand over our data and systems.
10. We will be responsive and flexible.	We will maximise the role of digital technology to be responsive and flexible in how we work and to meet the needs of all our stakeholders.

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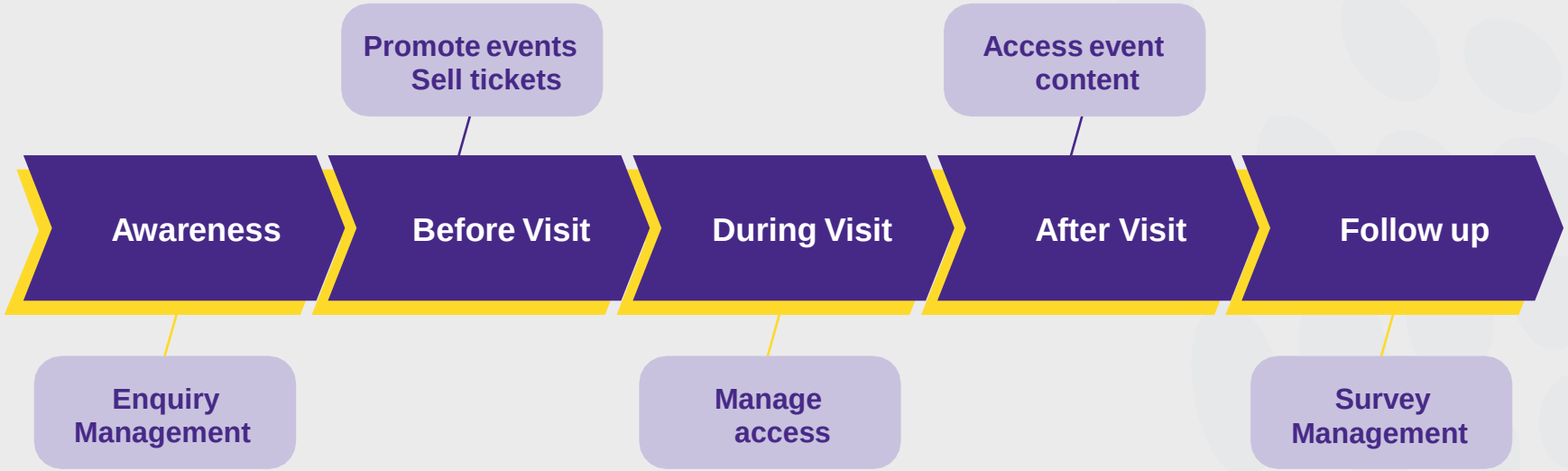
04 DIGITAL CAPABILITY MAPPING

IDENTIFYING DIGITAL CAPABILITIES

- A Digital Capability is a solution that combines people, process, data and digital technology to deliver a service to your stakeholders to satisfy their needs.
- The aim is to define stakeholder needs using Customer Journey mapping and from this identify the required Digital Capabilities.
- For example, for an event participant:



- Following discussions with Leeds 2023 staff we have developed templates to identify the Digital Capabilities for three key stakeholder groups & processes: Creative Team, Funders & Partners, Event Participants.
- The next 3 slides summarise this analysis.

EXAMPLE

Creative Process	Stage 1: Programme Development & Planning	Stage 2: Direct Engagement & Call-outs	Stage 3: Commissioning	Stage 4: Production	Stage 5: Evaluation
Digital Capability	**Artistic Commissioning** • Callout Management	As a creative executive I want to publish opportunities so that I can attract the right partners. As an artist/organisation I want to research and discuss an opportunity and submit a proposal so that I can partner with Leeds 2023.			

Digital Capabilities

Creative Process	Stage 1: Programme Development & Planning	Stage 2: Direct Engagement & Call-outs	Stage 3: Commissioning	Stage 4: Production	Stage 5: Evaluation
Artist & Community Engagement • Idea Co-creation • Project Collaboration	As a creative executive, artist, organisation or group I want to share my ideas so that I can co-create the Leeds 2023 Programme	As a creative executive, artist, organisation or group I want to collaborate so that I can deliver Leeds 2023 projects.			
Artistic Commissioning • Callout Management • Proposal Management • Contract Management		As a creative executive I want to publish opportunities so that I can attract the right creative partners. As an artist/organisation I want to research and discuss an opportunity and submit a proposal so that I can partner with Leeds 2023.	As a creative executive I want to manage the review and selection of proposals so that I can select and con- tract with the right creative partners	As an artist/organisation I want to submit invoices and receive payments.	
Project/Event Management • Project Initiation • Resource Planning • Delivery Coordination	As a creative executive I want to record high level information on ideas (potential projects) and earmark funding & resources so that I can develop the Leeds 2023 programme.	As a creative executive I want to define projects, set and allocate budgets so that I can plan the Leeds 2023 programme.		As a creative executive I want manage projects, and coordinate resources and activities, so that I can deliver the Leeds 2023 programme.	
Audience Research/Insight • Research Commissioning • Audience Data Capture • Analytics & Reporting	As a creative and marketing executive I want to commission research and collect/analyse data so that I can understand my audience and the outcomes of my activities				
Digital Asset Management • Asset Capture • Asset Mgmt/Retention • Asset Preservation				As a creative and marketing executive I want to capture, produce, publish and manage digital assets so that I can record and provide digital access to the Leeds 2023 programme.	

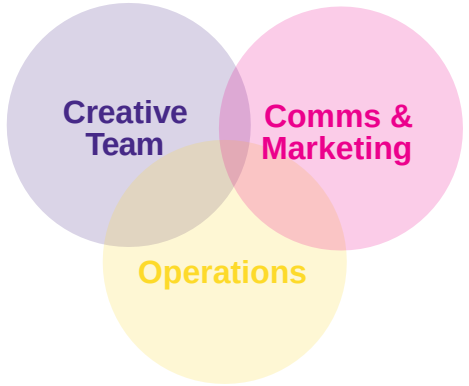
Digital Capabilities

Public Participation Process	Stage 1: Awareness	Stage 2: Before Visit	Stage 3: The Visit	Stage 4: After Visit	Stage 5: Follow Up
Public Engagement & Participation • Marketing Campaigns & Automation (Email, Social Media) • Enquiry Management • Public Event Management • Public Fundraising • Survey Management	As a member of the public I want to find out about Leeds 2023 as it interests me	As a marketing executive I want to publish and promote events so that members of the public can book/ participate.	As a marketing executive I want to publish/send event access information so that members of the public can participate.	As a marketing executive I want to publish/promote post event content in order to generate ongoing engagement and return visits.	As a marketing executive I want to generate feedback and run surveys in order to assess the success of the event.
	As a marketing executive I want to publish/send information, run campaigns, and respond to enquires in order to engage the public..	As a member of the public I want to research 'what's on' and (if required) book tickets so that I can participate in the Leeds 2023 programme.	As a member of the public I want to participate and share my experience.		
		As a development executive I want to generate income through donation , membership offers and other routes in order to increase revenue for Leeds 2023			
Audience Research/Insight • Research Commissioning • Audience Data Capture • Analytics & Reporting	As a creative and marketing executive I want to commission research and collect/analyse data so that I can understand my audience and the impact/ outcomes of my activities				

Digital Capabilities

Partner/Funder Engagement Process	Stage 1: Awareness	Stage 2: Before Visit	Stage 3: The Visit	Stage 4: After Visit	Stage 5: Follow Up
Strategic Partner/Funder Engagement • Prospecting Management • Relationship Management • Private Event Management • Proposal Management • Reporting	As a potential partner/funder I want to find out about Leeds 2023.	As a potential partner/funder I want to research opportunities to support or partner with Leeds 2023 and decide if this opportunity is right for my organisation.	As a potential partner/ funder I want discuss and define opportunities for partnership and support.	As a development executive I want to manage relationships and deliver an extraordinary experience in order to increase engagement.	As a development executive I want to review partner and funder engagement activities and report on their outcomes in order to demonstrate achievement of objectives.
	As a development executive I want to publish information about Leeds 2023 and current partner activity to present the case for partnership/support.	As a development executive I want to research prospects and generate leads to create opportunities.	As a development executive I want to cultivate the relationship through communications and events in order to convert the opportunity.		

ALIGNING THE DIGITAL CAPABILITIES



This diagram groups and aligns the digital capabilities from the stakeholder journey maps to the main phases of Leeds 2023

1. Programme & Organisation Development
2. Programme Planning & Funding
3. Production & Delivery
4. Evaluation & Reporting

Project/Event Management
(Project Initiation, Resource Planning, Delivery Coordination)

Artistic Commissioning
(Callout, Proposal, Contract Mgmt)

Digital Asset Management
(Asset Capture, Management, Retention, Preservation)

Artist & Community Engagement
(Idea Co-creation, Project Collaboration)

Audience Research and Insight
(Research Commissioning, Audience Data Capture, Analytics & Reporting)

Public Engagement & Participation
(Marketing Campaigns & Automation, Enquiry Management, Public Event Management)

Strategic Partner/Funder Engagement
(Prospecting, Relationship Management, Private Event Management, Proposal Management, Funder Reporting)

Running the Organisation
(Recruitment, HCM, Financial Management & Planning, Internal Comms & Collaboration, Impact Reporting)

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05 DIGITAL OPERATING MODEL

WHAT IS A DIGITAL OPERATING MODEL

- The Digital Operating Model is a blueprint for how Leeds 2023 will work.
- It is informed by the Digital Vision & Digital Design Principles.
- It represents a way of working that is unique to Leeds 2023 at this moment in time.
- The opportunity is for it to be a best practice model.

THE DIGITAL OPERATING MODEL

DIGITAL VISION: Digital is fully embedded and integrated across the Artistic, Operational and Communication functions and the ambitions of the Leeds 2023 organisation.

APPROACH: The whole organisation has a shared responsibility for design and delivery of the creative programme and the audience experience based on research and insight.

We will share the responsibility for Leeds 2023 being 'digital'.

We will create a best practice model for a Digital City of Culture.

We will use audience data and insight to make decisions.

ENABLING THE DIGITAL OPERATING MODEL

- The diagram on the next slide identifies the key enablers for each Digital Capability.
- For example:

	Process	People	Systems (and Data)		
Artistic Commissioning	Callout Management Proposal Management Contract Management	Executive Producer	CRM (Person/Organisation, Proposal, Contract, Payments)	Project Portal (Project, Proposal)	Finance Management (Budget, Transactions)

- The Digital Capability called Artistic Commissioning contains three processes:
  - Callout Management, Proposal Management, Contract Management
- The Executive Producer is Accountable for the delivery of this Capability
- There are three systems involved:
  - CRM, Project Portal, Finance Management
  - Each systems contains one or more primary data entities

DIGITAL CAPABILITY ENABLERS

Digital Capabilities	Process	People			Systems and Data		
Artistic Commissioning	Callout Management Proposal Management Contract Management	Executive Producer			**CRM** (Person/Organisation, Proposal, Contract, Payments)	**Project Portal** (Project, Proposal)	**Finance Management** (Budget, Transactions)
Digital Asset Management	Digital Asset Capture Digital Asset Management & Access Digital Asset Retention, Preservation & Archive	Digital Producer	Digital Product Officer	Head of Finance & Ops	**Digital Asset Mgmt** (Digital Assets, Metadata)	**Website Resources** (Digital Assets, User Data)	**Digital Media Capture** (Digital Assets)
Project/Event Management	Project Initiation Resource Planning Delivery Coordination	Executive Producer			**Project Mgmt System** (Project, Resources, Locations)	**CRM** (Person, Event)	
Artistic & Community Engagement	Idea Co-creation Project Collaboration	Executive Producer	Head of Experience Design		**CRM** (Person/Organisation, Event)	**Collaboration Tools** (People, Comms, Documents, Digital Assets)	
Audience Research and Insight	Research Commissioning Audience Data Capture Analytics & Reporting	Executive Producer	Head of Experience Design	Data Insight Manager	**Data Insight Solution** (Person/Organisation, Activity)	**CRM** (Person/Organisation, Activity, Event, Booking)	
Public Engagement & Participation	Marketing Campaigns & Automation Enquiry Management Public Event Management Fundraising ; Survey Management	Head of Experience Design	Marketing Manager		**CRM** (Person/Organisation, Activity, Event, Booking)	**Ticketing** Private Event (Person, Booking)	**Marketing Automation** (Person, Activity)
Strategic Partner/Funder Engagement	Prospecting Management Relationship Management Private Event Management Proposal Management & Reporting	Head of Development			**CRM** (Person/Organisation, Activity, Event, Booking)		
Running the Organisation	Recruitment & HCM Financial Management & Planning Internal Comms & Collaboration Impact Reporting	Head of Finance & Ops			**Finance Management** (Budget, Transactions)	**HR** (Person, Role, Activity)	**Collaboration Tools** (People, Comms, Documents)

Key - Accountable Responsible System (Data)

DIGITAL ROLES

These are the primary roles involved in enabling the Digital Capabilities

Digital Advisory Group

Exec Team + 'Digital Heads' + External Advisors
Purpose: Drives ongoing digital cultural thought leadership and helps Leeds 2023 develop best practice; supports digital skills and capability development, provides access to networks, enable, troubleshoot amplify the digital programme.

Executive Director

Head of Finance & Ops

- Purpose: Ensures Leeds 2023 runs smoothly
- Owns: Cross Org Processes, Systems & Data
- Success = Increased Efficiency

Data Insight Manager

- Purpose: Delivers data to support decision making and impact analysis
- Owns: Data & Reporting systems
- Success = Increased Insight

Creative Director & CEO

Executive Producer

- Including new responsibilities to optimise creative digital footprint

Senior Producer

Production Coordinator (EA)

Digital Producer

Technical Director

Director External Relations

Head of Experience Design

Marketing Manager

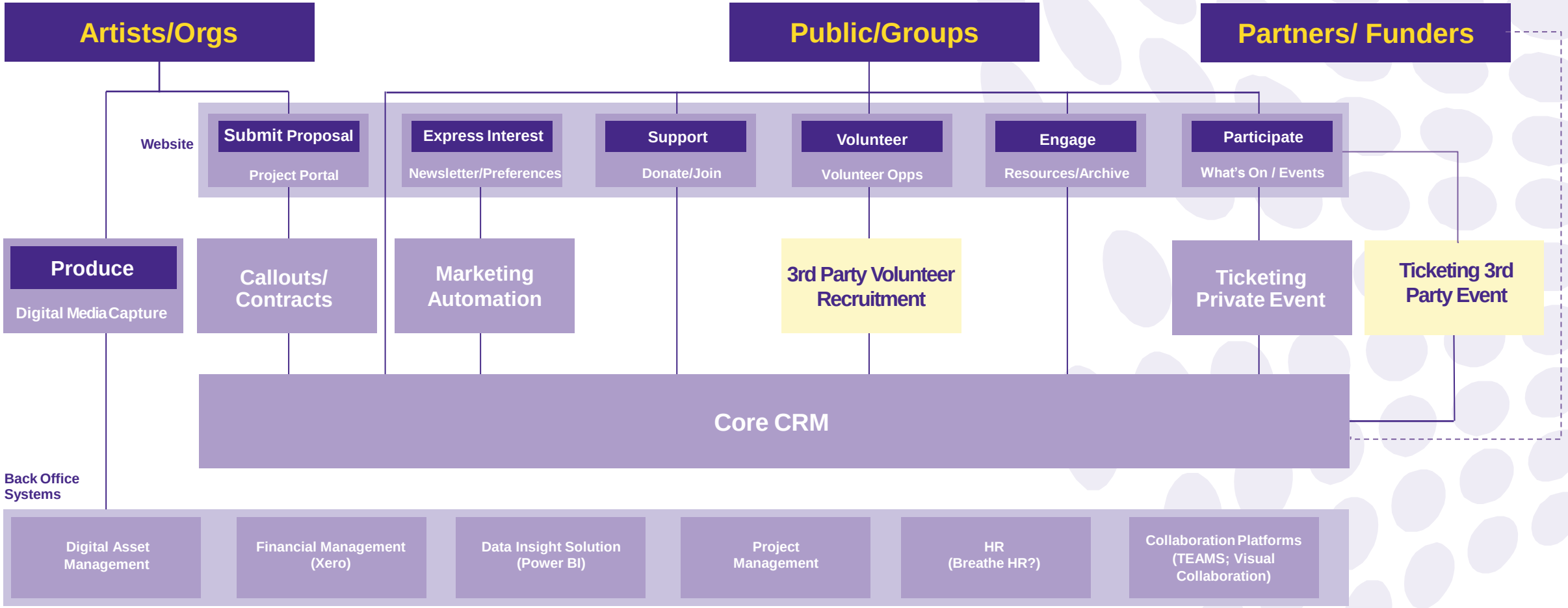
Digital Product Officer

Content & Social Media Officer

Creative Design Officer

SYSTEMS ARCHITECTURE

These are the primary systems involved in enabling the Digital Capabilities



06 RECOMMENDATIONS

1. **Governance**
    a. Adopt Digital Vision, Principles & Roadmap
    b. Establish Digital Advisory Group & TOR
    c. Agree Roadmap timeline, delivery responsibilities & budget
    d. Continue to develop the digital best practice model:
        i. Regular review and undertake digital capability mapping exercises across all stakeholders (as per template)
        ii. Agree Digital Archive & Exit plan

2. **Creative Programme and Production**
    a. Embed accessible, digital engagement into all call outs for works and projects in development as a criteria
    b. Consider the opportunities for using the website as another “site” or portal for audiences creative experience and engagement
    c. Establish/partner on both a creative sector programme and individual tailored support scheme to increase digital practice for artists in the city
    d. Build relationships and a bank of digital artists and creative technologists as part of the freelance supply chain

3. **People & Skills Alignment & Recruitment**
    a. Align Role JDs to the Digital Operating Model
    b. Identify digital training needs for staff and allocate training budget
    c. Establish digital mentors for key roles
    d. Establish an internship programme that includes digital roles across operational, marketing and creative programming areas of activity

4. **Process, Systems and Data**
    a. Document Key Back-office Processes E.g. Collaboration, Finance, HR, Project/Event Management
    b. Procure Systems – see Appendix D&E for budget estimate and suggested approach
    c. Agree an ‘in principle’ data sharing approach with Leeds Inspired and Visit Leeds
    d. Data security policies and procedures should be implemented consistent with the data use outlined in the Digital Roadmap

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07 DIGITAL ROADMAP APPENDICES

A. Digital Maturity Model
B. JD Head of Experience Design XD
C. Digital Roadmap Timeline
D. Digital Systems Procurement
E. Digital Systems Budget

APPENDIX A: Digital Maturity Model

Digital Maturity Model

Use this model to assess where you are and where you want to be on your digital journey

	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
	Offline Using mainly manual paper-based processes	**Digital Channels** Using digital channels but not digital end to end	**Digitised Services** Offline processes have been 'digitised'	**Digital Services** Processes have been digitally redesigned	**Digital Organisation** The organisation has been redesigned to work digitally	**Born Digital** The business model is digital first
The Digital Organisation	Analogue by design			Digital by design		
The Digital Journey	Evolution — Change happens organically		Transition — Change through specific projects		Transformation — Change through organisation-wide design	
Organisational Model: Culture & Values	Digitally evolving organisations are closed and unresponsive. They lack customer insight and find it hard to make quick, effective decisions because of bureaucratic and technological constraints and lack of timely information. Data not being understood or valued, with preference given to long-held but untested beliefs.		Digitally transitioning organisations understand their customers' changing expectations but aren't set up to respond. Even if one part of the organisation knows what change is needed, they find it hard to turn this into action. Specific projects are set up to tackle this.		Digitally transforming organisations are responsive, collaborative, open and experimental. An understanding of changing customer needs runs through the entire organisation and multidisciplinary teams are empowered and equipped to respond. They value data and work in an open way, both collectively and as individuals. They experiment, share what they're doing and how their thinking is developing.	
Organisational Model: Leadership & Strategy	Digitally evolving organisations have not evaluated or defined how they will respond to the digital opportunity. Leaders don't understand the changes that are being brought into our lives by digital technology and do not see this as a priority.		Digitally transitioning organisations adopt a 'Head of Digital' approach to create and lead a digital strategy that begins to align digital technology opportunities with overall strategy. Leaders are curious but may lack confidence and want to see real examples and results before committing.		Digitally transforming organisations have visible, accessible leaders who understand the changes being brought about by digital technology. They embrace experiments, change and failure. Ultimately no one individual 'owns' digital and the organisation's strategy fully incorporates the digital opportunity.	
Organisational Model: People & Process	Digitally evolving organisations do not provide staff with modern tools. Digital competencies are not understood. Digitally curious staff use their own devices and accounts to do what they want regardless, completely outside the organisation's control.		Digitally transitioning organisations are actively equipping their workforce within modern skills and tools. Digital competencies are being defined with HR actively involved. Digital pioneers in the organisation are encouraged to experiment within limited boundaries but can be frustrated by slow progress.		Digitally transforming organisations see their people as the very foundations for digital. The workforce enjoy a free, fast flow of information within and between teams — operating as a network rather than a hierarchy. Staff are given the mandate, space, permission to experiment and new ideas can be quickly acted upon.	
Organisational Model: Data & Technology	Digitally evolving organisations find it hard to access data in a timely way because of inadequate legacy technology. Traditional IT leadership does not 'get digital' and digital product development is limited to websites.		Digitally transitioning organisations see technology as an enabler and have small-scale experiments using digital technology to fix problems and address opportunities. Open data is understood. Digital product development is well supported, and IT leadership is being challenged and redefined.		Digitally transforming organisations see digital technology as an intrinsic part of the organisation, its products and services. Relevant, timely, data and insight is available to everyone. Digital product development is super-charged. Technology is interoperable, scalable and flexible. Data, digital and technology are inseparable.	

APPENDIX B: Job Description Head of Experience Design

Role Name	Head of Experience Design
Role Purpose	• Role Purpose: Extraordinary Experiences do not happen by chance! The Head of Experience Design's primary purpose is to design and implement extraordinary experiences through the delivery of communications, products and services across all channels and interactions, bringing the unique Leeds 2023 brand proposition to life. • Success: Increased access, participation, engagement and enjoyment of Leeds 2023 for all stakeholders. • Dimensions: Owns the organisation capabilities (processes and systems) that deliver audience and stakeholder experience including communications and interactions with Leeds 2023 products and services.
Key Responsibilities	• Design an extraordinary experience for audience and stakeholders, developing and coordinating all the necessary organisation resources and capabilities across the creative team, marketing communications, and operations. • Design for the whole scope of a stakeholder's journey both internally and externally, ensuring experience is 'designed-for' at the start of every project, arranging all interactions to influence behaviour, expectations and the memory of stakeholders within a particular context. • Co-create and plan artistic programme design and delivery with the Creative Team, representing all audience needs and expectations no matter the product, experience or channel; this can be digital product interface design or multichannel/physical experience. • Implement processes and solutions to ensure stakeholders experience of Leeds 2023 is as effortless, memorable, and 'extraordinary' as it can be. • Commission routine research into audience experience and project outcomes to inform future design, testing and continuous product/service improvements and support the evaluation of impact.
Person Spec	• A broad understanding of experience design tools and techniques including design research, experience maps, user journeys, process mapping, concept design and wireframes. • Experience of developing and managing an agile development capability for designing, testing and delivering digital products. • Experience of designing omni-channel user journeys that integrate physical and digital interactions and experience. • Experience acting as an internal agent of change, growing a culture for audience experience excellence and supporting organisation development of capabilities across people skills, processes and digital tools and technology that enable the delivery of audience experience. • Experience of supporting brand development, delivering integrated marketing campaigns and multi-channel content development and communications strategies. • Comfortable managing multiple stakeholders with differing project requirements; managing multiple priorities at the same time. • Experience commissioning and managing research and testing. • Can guide a complex project to a simple, elegant solution. • Can work as part of a multi-disciplinary team. • Experience of co-owning and co-creating ideas and projects.

APPENDIX C: Digital Roadmap Timeline

Digital Roadmap Timeline

		2021				2022	
		Q1	Q2	Q3	Q4	Q1	Q2
Recruitment	Head Experience Design			Recruit			
	Content/Social Officer	Recruit					
	Digital Product Officer		Recruit				
	Data Insight Manager		Recruit				
Systems & Data	CRM	Decision: CRM Scope and Approach (CRM RFI)	CRM Selection, Procurement, Implementation (CRM RFP)				
	Marketing Automation			Comms Solution Implementation			
	Ticketing			Private Event Solution Implementation	Public Event Integration		
	Project Portal			Portal Implementation			
	Data Insight Solution			Data Solution Implementation			
	Recruitment/HR	Trial Breathe HR	Breathe HR Implementation				
	Website	Launch Interim Brand Website			New Website Brief	Website Development	Website Launch
	Project Management	Options Review & Selection	Project/Planning Solution Implementation				
	Collaboration Platforms	MS Teams Training	Review Visual Collaboration Tools				
	Digital Media Capture			Review requirements & procure			

Overall Systems Procurement Approach

- Guiding Digital Principle: **We will embrace simple and elegant solutions and avoid over-engineering.**
  - This means using off-the-shelf software products with standard integrations and zero requirement for customisation
  - The aim should be to start with a simple (standard) configuration and iterate/expand use over time
  - This will meet the majority of your needs but may require a compromise on some requirements
- Data Evaluation: Complexity may be driven by the requirements of the evaluation framework; an iterative process should be used to ensure implications (and additional complexity) for systems should be minimised
- Ticketing: To reduce complexity Pubic Event ticketing will be handled by venues and third parties and data passed back to Leeds 2023 (requires data sharing agreement)
- Resourcing: The most cost effective approach will be to recruit in house staff with experience in system selection and procurement.
  - 3 Key roles: Head of Fin/Ops, Data Insight Manager, Digital Product Officer
  - External support may reduce the risk of selecting the wrong solutions and timescales extending

APPENDIX D: Digital Systems Procurement

System	Core Scope	Procurement Approach	Possible Solutions
CRM	Artist & Community Engagement • Idea Co-creation • Project Collaboration Public Engagement & Participation • Marketing Campaigns and Automation • Enquiry Management • Public Event Management (3rd party ticketing) • Fundraising • Survey Management Strategic Partner/Funder Engagement • Prospecting Management • Relationship Management • Private Event Management • Proposal Management • Partner/Funder Reporting Integrations: Project Portal, Comms Solution, Volunteer Portal (3rd Party), Ticketing, Data Insight, Finance	Request for Information (RFI) Run a RFI process to decide CRM scope, budget and solution shortlist: Include Core Scope plus: • Project Portal • Marketing Automation/Comms Solution • Private Event Ticketing • Data Insight Solution Request for Proposal (RFP) The RFI will help define the CRM solution scope, detailed requirements and supplier shortlist; include requirements for integrations as these will be key.	Donorfy (https://donorfy.com/) Good CRM (https://goodcrm.co.uk/) Etapestry (https://www.blackbaud.co.uk/products/blackbaud-etapestry) Beacon CRM (https://www.beaconcrm.org/) Hubspot (https://www.hubspot.com/)
Project Portal	Artistic Commissioning • Callout Management • Proposal Management • Contract Management	Ideally included as extended scope in CRM solution (check via RFI)	Other options include various grant management solutions TBC (integrated to CRM)

APPENDIX D: Digital Systems Procurement

System	Core Scope	Procurement Approach	Possible Solutions
Marketing Automation	Email and Social Media Campaign Management & Automation including newsletter Integrations: CRM, website	Ideally included as extended scope in CRM Solution (check via RFI)	Possible integrated solutions include: • MailChimp • DotDigital • ActiveCampaign
Event Ticketing	For Leeds 'Private' Events: basic event promotion, booking, access management. For Public Events: - publication on Leeds 2023 website (possibly through 3rd party service e.g. Leeds Inspired or direct to venue) - Booking and data capture via 3rd party service (with data sharing agreement) Integrations: CRM	Ideally included as extended scope in CRM Solution (check via RFI)	Private events: CRM or Eventbrite or similar system integrated to CRM Public Events booking data integration (data load) to CRM
Data Insight Solution	Data analysis and Reporting - Partner/funder reports - Impact reporting - Evaluation reporting - Audience insight	n/a extend MS365 licencing to include Power BI	Power BI
Website	Key transaction services include: - Project Portal - Donation/Support/Membership - Whats on, Booking (link to Leeds Inspired API) - Digital resources/archive - Virtual 'site' for programme and collaboration	There are two options: - Develop a new website towards end of 2021 - Integrate hosted third party services within current website Both options should be explored	Current Wordpress CMS with hosted integrated 3rd party services. Various alternative options including Drupal, Umbraco etc

APPENDIX D: Digital Systems Procurement

System	Core Scope	Procurement Approach	Possible Solutions
Project Management	Project/Event Management • Project Initiation • Resource Planning • Delivery Coordination	2 options: - Generic planning tool - Event management solution	Generic - Asana - Trello Event Planning - YesPlan (https://yesplan.be/en) - We Track (https://www.wetrack.com/)
Collaboration Platforms	Artists, Community Groups, Partners, Funders: • Idea Co-creation • Project Collaboration	MS Teams has already been adopted for general collaboration Visual Collaboration tools need to be evaluated	Visual Collaboration Tools - Miro - Mural - MS Teams Whiteboard
Digital Media Capture	Digital Asset Management • Asset Capture (sound, video, editing)	Potentially purchase two digital media capture kits, one located in the production team and one in the marketing team. Consult with the production team and any AV expertise you secure from a media partner or production company you engage for an audit of considerations in what you might actually need.	Example Kit could include • Roland R-07 or Zoom H8 Handy Recorder • Sony RX100 1V • Go Pro Hero 9 • MacBook Air

APPENDIX E: Digital Systems Budget

Leeds Digital Budget Estimate Dec 2020 v3

Summary

	2021		2022	
	One-off	**Annual**	**One-off**	**Annual**
Systems	50	25	80	45
Support	30		30	
Totals	80	25	110	45

	2021		2022		
	One-off	**Annual**	**One-off**	**Annual**	**Notes**
Systems					
CRM	15	5	20	10	Based on plug/play product with some configuration and integration support Yr 1 25k; Yr 2 10k
Website	15	5	35	15	Phase 1 2021 15k; Phase 2 2022 35k
Event Ticketing	0	0	0	0	Based on Eventbrite solution - free events have no charge; paid events are % of sales
Data & Reporting	5	3	10	3	Based on Power BI - budget included for evaluation report design
Project Portal	5	5	10	10	
Recruitment/HR	5	5	0	5	
Project Management	0	2	0	2	Based on Asana
Digital Media Capture	5	0	5	0	
Support					
System Impl Support	30		30		RFI/P & Implementation support (reduced if in-house team can do this)