UK SMART Recovery Tender Document

Website and CRM Brief

March 2025

Introduction

UK SMART Recovery is a leading national non-profit organisation committed to empowering individuals who are facing challenges with any form of addictive behaviour. We provide a science-based approach to recovery that emphasises self-reliance, self-empowerment, and evidence-based psychology techniques. Our programme has the aim of participants living a balanced life.

UK SMART Recovery is part of the global SMART Recovery network, which was first established in the America in 1994. The organisation has since grown to become an internationally recognised leader in addiction recovery support, offering practical tools and resources for individuals who are working toward lasting recovery from alcohol, drugs, gambling, and other addictive behaviours. UK SMART Recovery is one of 3 founding affiliates along side America and Australia and has been established in the UK since 2015.

SMART Recovery stands out for its unique and flexible approach as it provides its programme through a variety of means: it can be professionally led and delivered within addiction treatment services either on a 121 basis as a psychosocial intervention or as group meetings. It can be provided by peers in recovery via mutual aid meetings either face-to-face meetings or online. Our program combines elements of cognitive behavioural therapy (CBT), motivational interviewing, and rational emotive behaviour therapy (REBT) to help individuals gain control over their thoughts, feelings, and behaviours. Once an organisation commissions the programme or a peer applies to volunteer for us, they are trained by us to become facilitators. Those facilitators go on to support people in addiction recovery to understand and use our structured 4-point programme to gain freedom from their addiction.

Our goal is to support individuals on their journey to long-term recovery, helping them build the skills necessary to manage their recovery effectively. We empower people to take charge of their lives and improve their mental health and well-being. Our strap line is Discover the Power of Choice.

"To help individuals achieve and maintain sobriety and well-being by empowering them with the tools, skills, and support needed to overcome addiction and live fulfilling, positive lives."

Reasons for Change

SMART Recovery is seeking to upgrade its current website and CRM systems due to several challenges with the existing platforms:

- Outdated Website: Our current website (https://smartrecovery.org.uk/) is not user-friendly, difficult to navigate, and lacks essential features that both our team and client base require. It does not fit with our emerging business model, and it is poorly designed. The website must also either have a meeting finder embedded within it or

be linked to one and a facilitator portal. It also falls out of the agreed and established website design principles of the other 2 founding affiliate countries (USA and AUS).

- **Website Usability:** Finding information on the current site is challenging, and it does not offer the flexibility or user experience necessary to engage and support our community effectively. The facilitator portal is not well utilised. The new website will prioritise improved design, functionality, and accessibility for all users.

- **Current CRM System:** The existing CRM is a custom database built on ACT! by a previous staff member without sufficient expertise in database development. The system has become difficult to maintain, and no one within the organisation has the necessary knowledge to make updates or improvements. It does not link to our website or mailing systems and in doing so does not function as a fully integrated CRM system. This has led to limitations in using the CRM effectively and it is holding the organisation back from modernising its approach to stakeholder management.

- **Data Transfer Needs:** The information stored b y the organisations currently sit in the current CRM and Excel spreadsheets which are not linked together. All information from all current sources needs to be migrated to a new CRM system. Ensuring a highly secure, smooth and robust transfer of data is a priority so that we can continue to manage and utilise client information effectively.

This project aims to replace these outdated systems with more modern, scalable solutions that better serve our organisation's needs and improve the experience for our clients.

Project Team

The following individuals will play key roles in the successful delivery of this website and CRM project:

- **Matthew Frost – Project Lead**
  Matthew is the Business Coordinator for UK SMART Recovery and will serve as the primary point of contact for the project. He will liaise between SMART Recovery and the development team, ensuring efficient communication and alignment of priorities and workflows throughout the project.

- **Dr. Charlie Orton – Chief Executive Officer**
  Dr. Orton, as CEO, is responsible for agreeing resource deployment and will provide leadership capability, overseeing the strategic direction and high-level decision-making to ensure the project aligns with SMART Recovery's goals. The CEO reports progress to the Board of Trustees.

- **Tina Moran – Chief Finance Officer**
  Tina will manage all financial aspects of the project, advises the CEO and Board of Trustees on investment requirements, including handling payments and ensuring the project stays within budget.

All three are responsible for identifying and managing the risks associated with the project. These team members will work closely with the chosen vendor to ensure the project is

delivered on time, within budget, and meets the needs of SMART Recovery and its users. They will leverage the skills and input of the wider team as necessary.

2. Project Scope

Website Development

The new website for UK SMART Recovery will serve a broad range of audiences, from partners existing and new and service users to facilitators and internal staff. The website will be user-friendly, functional, and aligned with the existing design and code provided by our partner organisation. Below are the key features and functionalities required:

Target Audience:

- Potential partner organisations looking for collaboration opportunities (new business).

- Existing partners needing resources or updates.

- People looking to use the programme for themselves or someone else finding mutual aid meetings and access online resources, information, news, events.

- Facilitators needing access to worksheets, resources, and relevant information based on their level of training.

Key Features:

- User Portal: A secure login area for individuals to access content based on their role and training level. Content access will be restricted accordingly. Needs to be a dynamic space, fresh content, a reason to go there frequently.

- Donation Functionality: A secure, easy-to-use donation system integrated with the website to allow visitors to contribute online.

- Online Store (Shop): E-commerce functionality to allow the sale of relevant products (e.g., recovery handbooks, branded items, etc.).

- News Section: A section for publishing updates, events, and other news relevant to UK SMART Recovery's activities and developments. BLOGS, VLOGS, Podcasts etc

- Resources Section: A dedicated space to house valuable recovery tools, articles, guides, and other helpful resources.

- Accessibility Toolbar (Optional): While not mandatory, we would prefer the option to include an accessibility toolbar to improve site usability for people with disabilities/access needs and so it can be translated into other languages easily.

- Simple, User-Friendly Navigation: The website should be designed to ensure visitors can quickly and easily find the information they are looking for, regardless of their user type.

- Develop a meeting finder for online and in-person recovery meetings in the UK, with filters for location, type, time, and meeting format (e.g., open, closed), ensuring ease of use and mobile compatibility. There is a system in place at present called Pathminder, but its business model is not compatible going forward.

- Including AI tools to tailor website content, layouts, and recommendations based on user behaviour, such as location, browsing history, or preferences.

- We require the integration of an AI chatbot to provide real-time customer support, answer inquiries, assist with navigation, and enhance user engagement on the platform.

- We require SEO optimization to improve search engine rankings, enhance visibility, and drive organic traffic to the website.

- We require a customizable toolbar on the website that allows users to adjust colours, text size, language preferences, and accessibility features to enhance user experience and accessibility.

- AI-driven security tools will be implemented to safeguard the website from bots, spam, and potential cyberattacks, ensuring enhanced protection and security.

- The website must be maintained in house as much as possible by our own team. The content management system must be easy to use and fully accessible by us. Day to day maintenance of our website will not be provided by a third party. Fundamental/substantial alterations to its architecture can be delivered by a third party.

Design and Code:

It is important to note that the website will not be built from scratch. The code from a founding affiliate will be gifted to us for a developer to use to re-engineer it to suit the Uks needs.

- The website design will closely follow the existing code and design shared by our partner organisations from either the USA (https://smartrecovery.org/) or Australia (https://smartrecoveryaustralia.com.au/). We will be receiving the code for these sites, which are identical except for regional differences and the UK is to follow this convention. The design is simple yet engaging, and for the UK audience the project will ensure all necessary information is easy to find and is 'anglicised' for a UK audience. However, we may move away from certain design elements or the ordering of information from the current sites, such as overly complex navigation or features that do not align with the needs of our UK audience.
- UK SMART Recovery will own the code to its website.

CRM System

The CRM will be integrated with the new website to track, manage, and update client and partner information efficiently. The system will sync with the website to ensure that real time insights can be gained.

Key CRM Features:

- Client & Partner Database: The CRM will store information about clients, partners, and facilitators. Data should be structured to easily track their interactions with SMART Recovery, such as meeting attendance, donations, and more.

- Communications and Marketing: The CRM will modernise the ways we mail our stakeholders. It will enable segmentation of our audience and track user interaction with emails that we send. It will enable targeted communications and modernise the way we market our products. It will enable us to run campaigns and manage donor retention better.

- User Roles & Access Levels: CRM access will be customised based on roles, with varying levels of permissions for different users (e.g., admin, facilitator, partner). The intention is that the whole team use it on a day-to-day basis.

- Integration with the Website: The CRM system must integrate seamlessly with the website to ensure smooth data transfer between the two platforms. For example, when a user submits a "Contact Us" form or similar inquiries, this data should be automatically routed into the CRM and assigned to the relevant staff member for follow-up. The system should ensure that all form submissions are captured accurately and made accessible to the appropriate team members without manual input. It must be able to provide business insights.

- Data Privacy & Compliance: The CRM must adhere to relevant data protection laws and allow for secure storage and management of sensitive data. The server needs to be GDPR compliant.

Additional Requirements

1. Scalability: As UK SMART Recovery continues to grow, the website and CRM should be scalable to accommodate increased data, users, and functionality.

2. Security: Strong security protocols will be necessary for both the website (especially for the donation and login sections) and the CRM to protect user data and prevent unauthorised access.

3. Flexibility: to be able to change or update items efficiently and with ease, to be able to get broken links or pages fixed quickly.

4. A meeting finder.

Training and Support

As part of the project, SMART Recovery will require comprehensive training for our staff to ensure effective use of the new CRM and website. This will include:

- **General Training for Staff**: Training will be provided for **11 staff members** and **one volunteer** on how to access and navigate the new systems, as well as how to use the key features effectively.

- **In-depth Training for Core Staff**: More substantial, role-specific training will be required for key staff, including **Matthew Frost** (Project Lead) and **Tina Moran** (Chief Finance Officer), to ensure they can manage and maintain the systems, handle reporting, and oversee ongoing updates.

If any installation or technical setup is required, SMART Recovery will collaborate with our IT service provider, **Razorblue**, to ensure smooth integration and system configuration.

We expect the vendor to provide training sessions, documentation, and support to ensure a smooth transition and enable our team to fully leverage the new systems.

Budget and Financial Considerations

The budget for the website and CRM development project is currently in the process of being finalised and approved. As such, we are unable to provide a specific budget or budget range currently. Once the final budget is confirmed, it will be shared with the selected vendor to ensure alignment with the project scope and requirements. We welcome estimates/indicative budget at this stage.

We request that vendors submit proposals based on the scope outlined in this document, and we will work closely with the chosen vendor to align the project deliverables with the available budget once it is determined.

Project Timeline

While the exact deadline for the completion of the website and CRM development project is yet to be finalised, SMART Recovery requires the project to be completed and fully functional within the calendar year of **2025**. We are unable to specify an exact month at this stage, but it is essential that the new systems are operational within the year.

Vendors should outline a proposed timeline for the project in their submissions, keeping in mind that the final completion date will be aligned with our internal planning and approval processes.

Maintenance and Hosting

Currently, SMART Recovery's website hosting and maintenance services are provided by our existing website provider. As part of the new website and CRM development project, we would like to discuss hosting and ongoing maintenance options with the new provider.

Vendors are requested to outline their hosting and maintenance offerings, including costs, service-level agreements (SLAs), and post-launch support, in their proposals. We are looking for a comprehensive solution that ensures reliable hosting and regular updates to support the long-term success of the new systems.

Deadline for Submission

The deadline for submission of tenders will be at **5pm on 31st May 2025** All tenders must be received by this date and time to be considered.

Please ensure that your submission is complete and in compliance with the requirements outlined in this document. Late submissions may not be considered.

All tenders must be submitted via email to matthewf@smartrecovery.org.uk in PDF format. Please ensure the subject line of your email includes the tender reference number and the name of your organisation.