

Investing for the future

This case study describes three projects undertaken with the Institute of Fundraising in 2008.

About the Institute

The Institute of Fundraising is the professional body that represents fundraisers in the UK. Its purpose is to support fundraisers to deliver excellent fundraising.

Committed to the highest standards in fundraising practice and management, the Institute represents the profession throughout the UK. Their work shapes policy and influences legislation, and they engage with charities, Government, media, other relevant professional bodies and the general public across a broad spectrum of issues that impact UK fundraising.

The Institute strives to support and develop fundraisers' knowledge and standards, and offers an extensive range of opportunities for training and networking. Their Certificate in Fundraising Management is the professional qualification for fundraisers.

The Institute provides dedicated information and support services to its membership of over 4800 individuals and 290 fundraising charities and organisations.

What was needed

The Institute of Fundraising wished to buy two major systems that would enable them to develop services to members.

As a membership organisation, it was important that they managed their contact and communications with members and other

contacts effectively. Fundraisers interact with the Institute in many ways, including: subscribing for membership to demonstrate compliance with its Codes of Practice and enjoy individual or organisational member benefits; attending events and conferences; belonging to regional or special interest groups, or undertaking professional development. Following an organisational restructure and a renewed marketing strategy, the Institute required a system that would support its expansion.

As a professional development organisation, the Institute also wanted to be able to offer online training ("e-learning") to complement the face-to-face training delivered both directly and by licensed providers. This would enable many more fundraisers to access affordable and flexible training. .

The Institute commissioned Clearsight Consulting to help specify their requirements and manage the selection process for each of these systems. All the work was undertaken in partnership with the Institute's Head of Information & Communications Technology.

"The Institute chose Clearsight because we needed a consultant with experience in both the commercial and not-for-profit sectors, strong interpersonal skills and technical experience, who could offer unbiased, independent advice."

Simon Saunders, Head of ICT

Contact management

Recognising that simply automating existing processes may entrench ineffective practices, the Institute first asked Clearsight to review their current processes, particularly looking at how different departments interacted. This review involved interviewing individual staff and teams across the Institute to capture the

necessary information about processes and information flows. The final report from this review defined different groups of contacts, described the existing processes and identified both issues to be resolved and the emerging requirements for the new system.

Following on from the review, an intensive series of staff workshops were held to gather their requirements and to set priorities – particularly important if delivery of the system had to be phased or some aspects were very expensive. The Institute used its document management capabilities to coordinate the reviews of the resulting requirements specification; a very useful approach with over a dozen enthusiastic reviewers!

The specification was comprehensive, describing a system that would enable the Institute to manage membership, events, professional development and marketing. A number of suppliers were invited to tender to provide some or all of the new system, with vendors from both the not-for-profit and the corporate sectors. Based on their responses, three were invited to present their solutions and answer questions for the Institute's selection panel.

All presented excellent options for the Institute to consider. However, following the presentations, the panel made a unanimous choice of supplier, not least due to their track record with professional bodies. The chosen supplier has now begun implementing their system for the Institute.

"Managing relationships between the Institute, fundraisers and stakeholders is central to our work. With Clearsight's help, we were able to identify our specific requirements and to find a system that met them."

Simon Saunders, Head of ICT

E-learning

For the E-learning project, most of the requirements were already known, but the Institute wanted Clearsight to help create and manage a structured selection process.

The project was led by the Institute's Director of Professional Development, who wanted an open competition, advertised to the supplier community through the relevant professional institute (the British Institute for Learning & Development). The likely number of interested suppliers made it necessary to use a Pre-Qualification Questionnaire (PQQ) stage to make the selection process manageable. Using the PQQs, the original field of 25 was whittled down to 8 suppliers who were invited to tender for the project.

The detailed responses received from these suppliers were scored, client references were taken up and two suppliers were invited to present to the selection panel. After much discussion about the merits of the two different approaches and systems presented, the Institute appointed a supplier. The first e-learning student booked their course in November 2008.

If you are looking for help in selecting or commissioning a system, website or web application, please contact Heather Alexander at Clearsight Consulting for a no-obligation discussion of your needs.

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