



GROUNDWORK EAST

Groundwork East CRM - CRM development brief

1. About Groundwork East

Groundwork East is part of a national Federation of charities across the UK, with Groundwork East operating across Bedfordshire, Cambridgeshire, Essex, Hertfordshire, Norfolk, and Suffolk.

Since its Hertfordshire inception in 1985, Groundwork has expanded across the six counties, delivering a wide range of projects that tackle issues in communities – poor health and wellbeing, low skills, high unemployment, fuel poverty, and negative impacts on the environment.

Due to the nature of our work we are funded by a variety of means – grant funding, local government, local authorities, housing associations, corporate organisations, to name a few. We work with people, organisations, and businesses of all shapes, sizes, locations, and walks of life.

This means we manage a wide range of data and information, send out multiple communications, and organise multiple events across a broad geography.

2. What we're trying to do

We're passionate about what we do and we know we need to better manage the relationships with our funders, participants, volunteers, donors and supporters.

A key part of this is a CRM system. Our current system is not fit for purpose, nor is it user friendly. It makes managing relationships difficult and is not future-proof for our planned fundraising, development, marketing, and project management needs.

As Groundwork continues to evolve, expand, and adapt to a new funding landscape, there is real need for us to adopt a much stronger CRM system.

We are attempting to find a solution that meets our needs across the five different types of relationships, whilst still being a user-friendly, intuitive system. We have identified the following aims for the project:

- Upgrade – move to a more intuitive, fit for purpose system
- Efficiency – manage data more effectively, saving staff time
- Future-proof – a system that fits our organisational goals now and in the future.

We are looking for a CRM supplier to work with us over the next three months to deliver this project and achieve these aims.

3. What we're looking for

We're looking for a partner – an organisation that can work alongside us to implement our plans.

We anticipate commissioning an external supplier to:

- demonstrate their product as a fit-for-purpose solution that meets our needs
- implement the solution and assist with migration
- provide any necessary training to enable us to be as self-sufficient as possible
- leave us with a hosting and support arrangement that is responsive and cost-effective.

This project will be led by the Marketing & Communications Manager but supported by a team of colleagues from across Groundwork East.

4. Outline specification

We have a good idea of what we require from a new system; considering our current system's limitations, what data and relationships we need to manage now, and what we would like to manage in the near future.

Our CRM system needs to drive and support our organisational goals:

- Development – managing relationships with potential funders and delivery partners
- Fundraising – managing individual and organisational donations, and fundraising campaigns
- Marketing – marketing campaign management and event management
- Project & volunteer management – collecting and managing project data securely.

Key considerations for us are: being GDPR compliant, having a user-friendly interface that is intuitive to reduce staff time, and levels of user access permissions.

Our specifications are as follows:

- Managing data for the following customer types – including segmentation and customised input forms:
 - project participants
 - volunteers
 - businesses
 - organisations
 - donors

- Campaign management
- Newsletter/ bulk emailing – or the ability to integrate with MailChimp or similar
- GDPR compliance – clearly demonstrate when they subscribed and what for
- Functional links to Outlook - emails and calendars
- Functional links to SAGE – project management and accounting
- Event management – or the ability to integrate with Eventbrite
- Account permissions and user access control
- Simple user interface
- Intuitive system
- Can be used offline – view data and delayed importing (collect and store to then import once connected)
- Customisable forms
- Link to ePortfolio
- Unlimited (within reason) user accounts – we wanted every staff member to have an account as standard

We have the usual expectations in terms of accessibility and functionality:

- Bulk upload & export
- Functional links to Microsoft package
- Reporting tools and functionality – export ability
- Comprehensive search function
- Mobile friendly
- Hosted in a secure virtual environment
- Support system
- Admin controls

5. How we'll decide

We know it's difficult to demonstrate on paper what your CRM can do. What we do want to know, however, is that someone understands our needs and has some credible solutions. Your brief should cover the following ground as a minimum:

- **Your understanding of the brief and our requirements**
- **Your approach to the task** – We understand this won't be the finished solution but we need to know something about the solution you have in mind.

- What out-of-the-box solution do you have?
 - What customisations will we need and what can you offer?
 - Hosting and recommended platform
 - **Your preferred way of working** – How would you like to interact with us in order to ensure we're both getting what we need from the process?
 - **Evidence that you've done this before** – How have you achieved similar results for similar organisations?
 - **Who will do the work** – We know this will work best if we have confidence in the people we're working with. This means finding the right combination of frequent contact and specialist expertise. We'd like to know who we'd be dealing with and what expertise and experience they bring.
 - **Ongoing support** – CRM systems need continual maintenance and upgrades and often users need support – who will offer this, how will it be managed, and what does it cost?
 - **What it will cost and how long it will take** – Like many not-for-profit organisations, we have big ideas but limited budgets, we want to hear your best not-for-profit rate. Tell us how much our ideal solution will cost and whether it can be delivered by March 2020.
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6. What to do next

There's no set format for what you submit but bear in mind we'll need to email it and print it so clear and simple will always be best.

Please send your submission to Amber Land – amber.land@groundwork.org.uk

Our deadline for responses is **Thursday 16 January 2020**. We anticipate inviting shortlisted suppliers for interview in the following week, with interviews held late January/early February.

If you have any written queries, please contact us directly at amber.land@groundwork.org.uk