



# Systems integration and Cake

24 May 2018

 @AdaptaforNFP

# Programme

14.00 **Arrival and welcome**

14.15 **The 'What's', 'Whys' and 'How's' to integration**  
**COFFEE**

15.00 **Case studies**

Mohammed Zabhier, Islamic Relief

Danny Attias, Anthony Nolan

15.50 **Discussion and feedback**

16.30- **Review and close**

17.00

# Adapta Consulting

We are:

- A specialist information systems consultancy
- We only work with membership organisations, charities, associations, trusts and others in the NfP sector
- We are completely supplier-independent
- Our consultants have held senior positions in a broad range of different organisations
- Our advice and guidance is based on practical experience gained over many years.

# Introductions

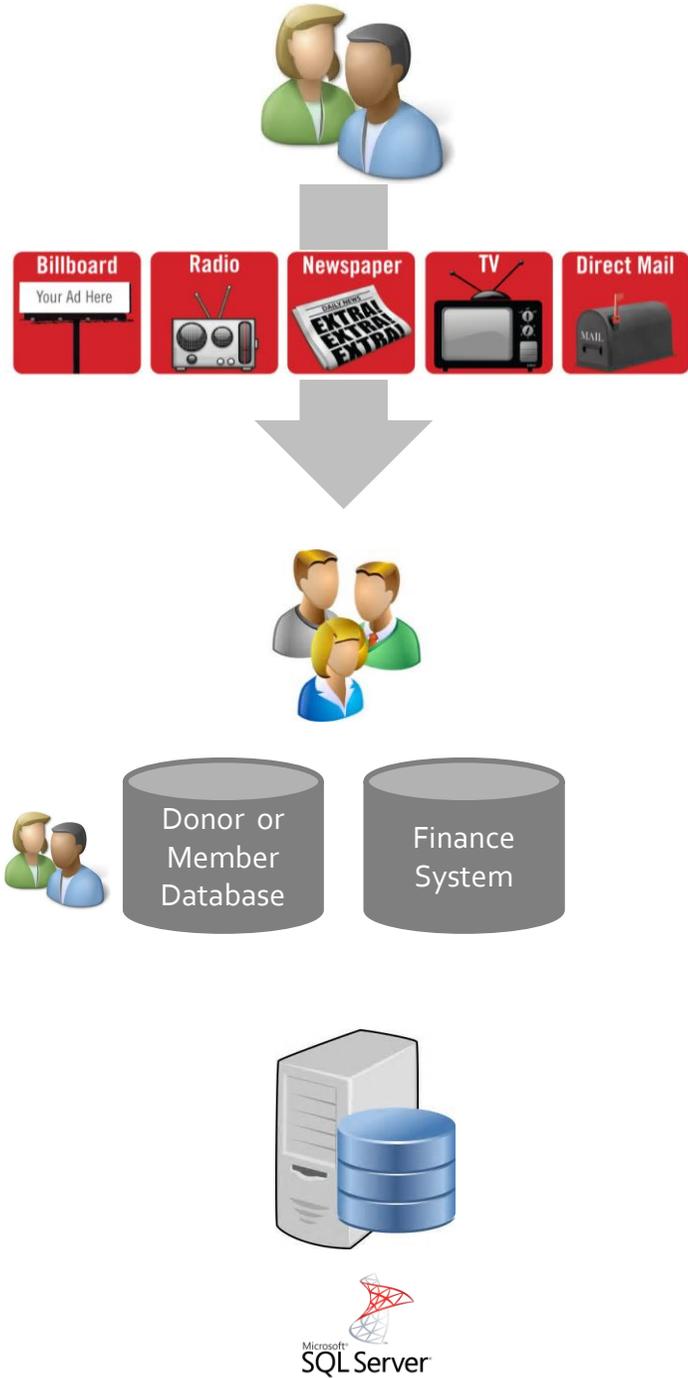


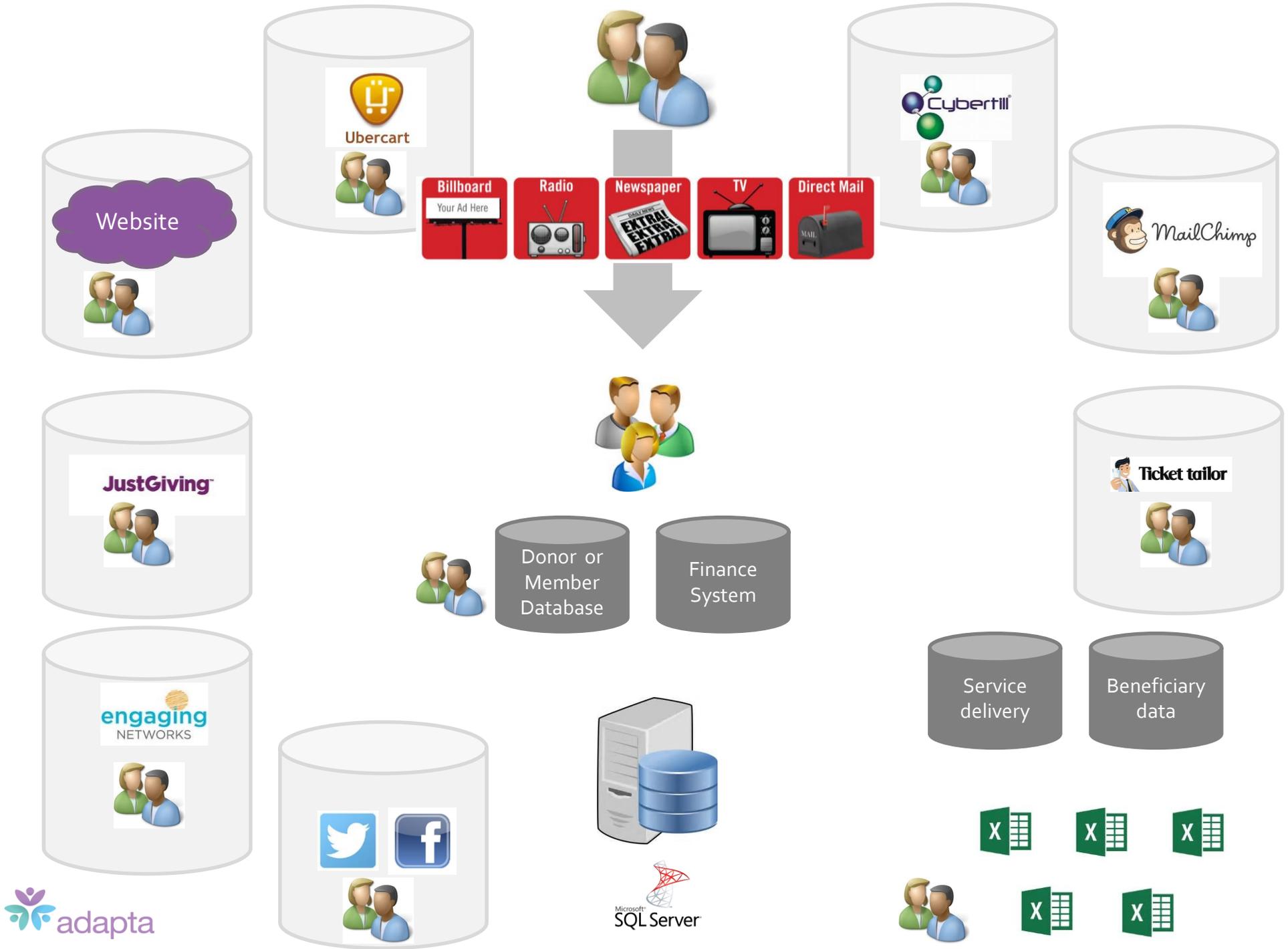
# Why's, What's and How's to integration for a modern non-profit

Keith Collins, Adapta Consulting

# Profile of the modern not-for-profit organisation

- Has a wider variety of customer touchpoints
- Has a mix of systems and tech – both owned and provided as a service
- Operates in a world of greater customer expectation
- Operates in a world of increasing regulatory scrutiny
- Is trying to do more with less





**Is a lack of integrated data & systems  
keeping you awake at night?**

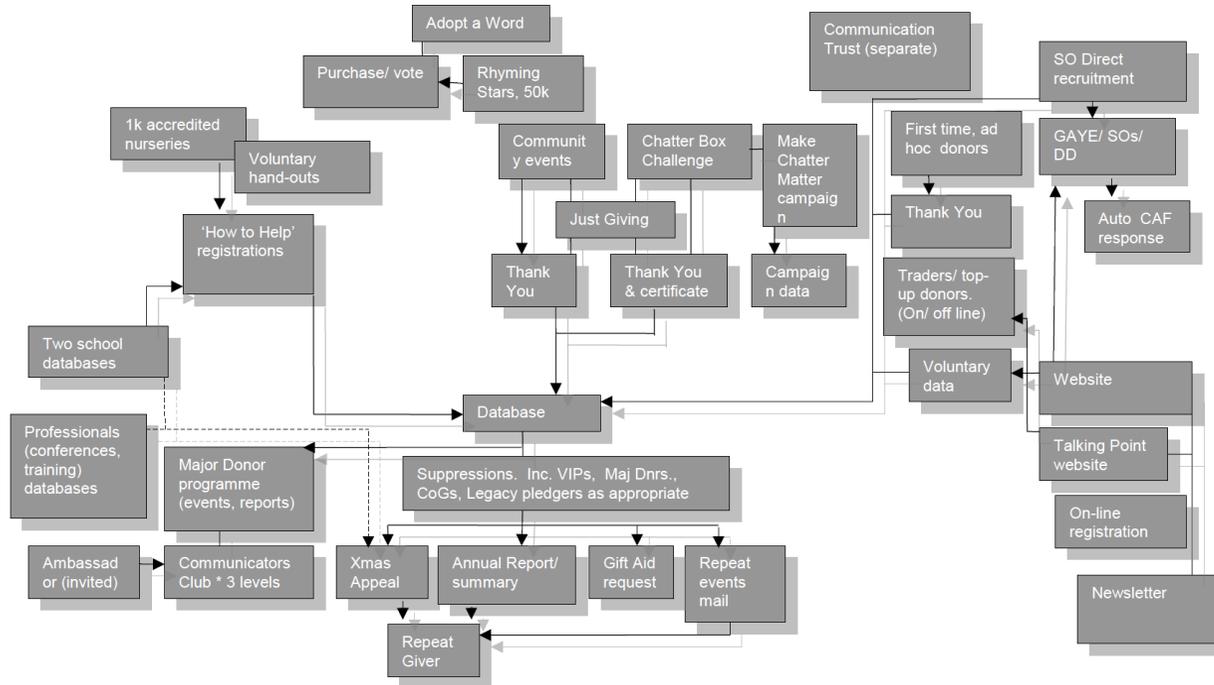


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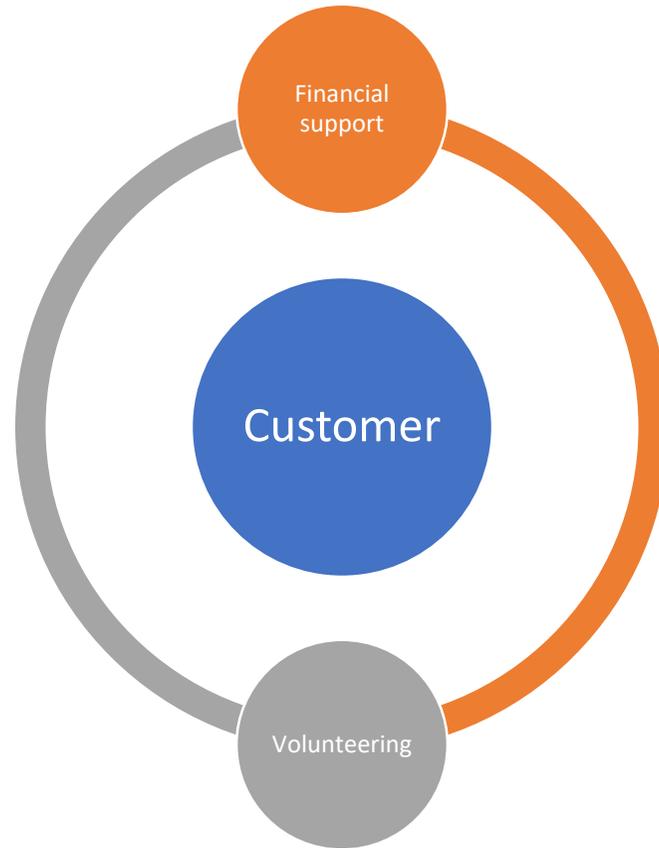
The impossible customer journey  
GDPR & the subject access request  
Fundraisers not fundraising

# The customer journey vision









# Data Subject Rights

- Right to be **informed** (transparency) – privacy notices
- Right of **access** – subject access requests
- Right to **rectification** – if data is inaccurate or incomplete
- Right to **erasure** – ‘right to be forgotten’
- Right to **restrict processing** – storage only
- Right to **data portability** – moving data from one IT environment to another
- Right to **object** – includes right to object to direct marketing
- Rights re: **automated decision making** and **profiling**

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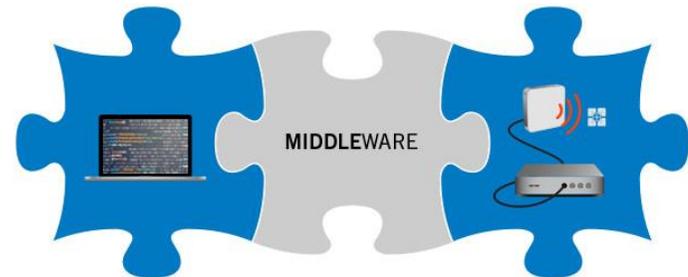


Are our fundraisers  
raising funds?

**Or are they spending too much time doing this kind of thing?**



# Systems and data integration – so many options



# But before you do anything

Understand your  
strategy

Understand your  
customers

Understand your  
data

Understand your  
culture & processes

# But before you do anything

Understand your strategy

How vital is the 'single customer view' to your organisation?  
What is the role that digital will play for your organisation?

Understand your customers

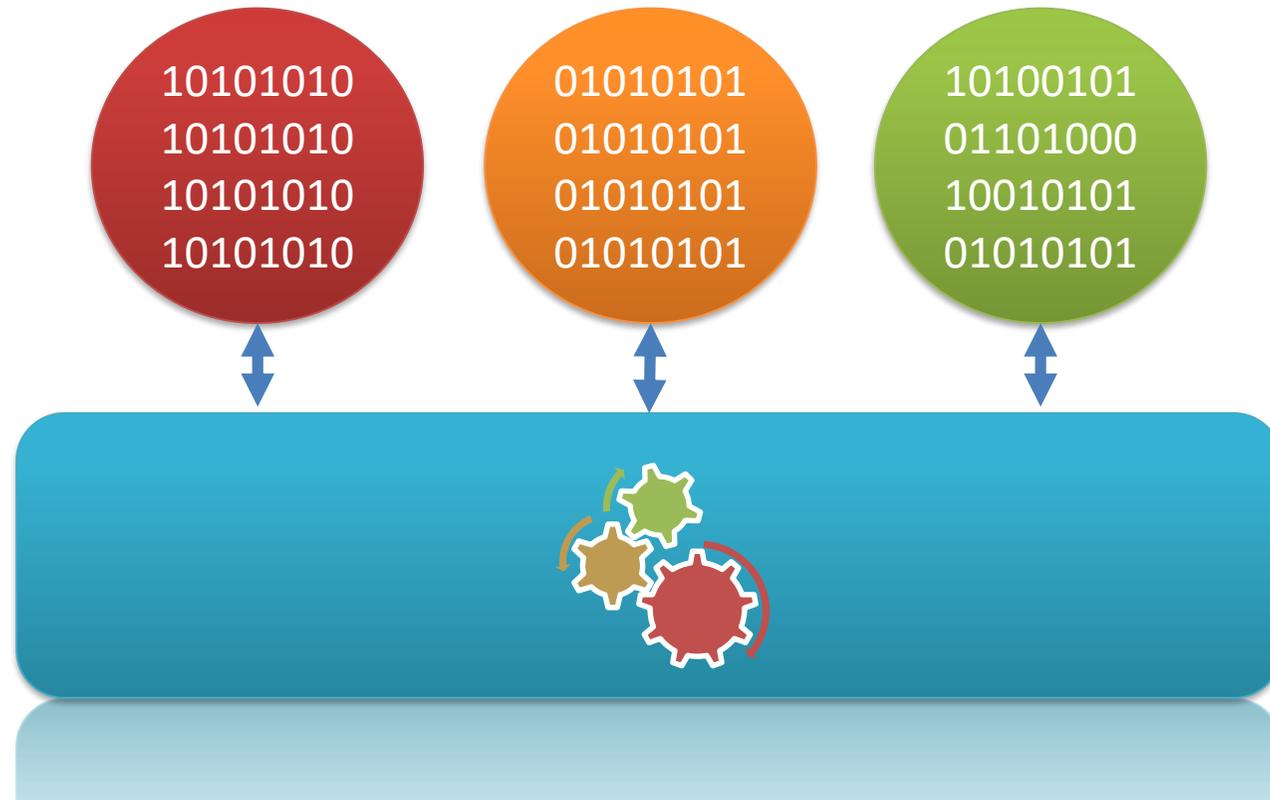
What do they really expect from your organisation?  
If you built it, would they actually come?

Understand your data

What data do you have?  
What data do you really need?  
Where does it come from?

Understand your culture & processes

Is everyone excited by a brave, new, integrated world?  
Do some people not want to be a part of it?



## Systems Integration at Islamic Relief UK

Mohammed Zabhier, Head of ICT and IS

“And whoever saves  
the life of one person,  
it is as if he had saved  
all mankind”

Qur'an 5:32

*Inspired by our Islamic faith and guided by our values, we envisage a caring world where communities are empowered, social obligations are fulfilled and people respond as one to the suffering of others.*



**1%**  
CAMPAIGNING  
FOR CHANGE

**5%**  
SUPPORTING  
EDUCATION

**11%**  
SUSTAINABLE  
LIVELIHOODS

**17%**  
ACCESS TO  
HEALTHCARE  
AND WATER

**19%**  
CARING FOR  
ORPHANS AND  
CHILDREN

**47%**  
PROTECTING LIFE  
AND DIGNITY

**55,000**  
Vulnerable children  
supported through  
1-2-1 sponsorship

**7**  
million  
people assisted  
worldwide in  
2016

**100** offices  
in over 40 countries  
around the world

**34**  
years of service to  
humanity

**2,700**  
dedicated  
staff

Over  
**£99**  
million  
Spent in 2016



- Protecting life and dignity
- Empowering communities
- Campaigning for change
- Strengthening organisational capability



Strategic Islamic Relief partners that continue to fund our programmes



- Raise funds in the UK for programmes around the world
- 14 Charity Shops (mix of retail and donations) and community fundraising presence across the UK
- Supporter Care in Waterloo, London
- Raiser's Edge for fundraising administration tool
- Online fundraising



Campaign

Careers

Challenges & Fundraising

Charity Shops

Clothes Recycling

Events

Fundraise

Internships

Volunteering

# Drivers for Integration

One view of all donations

Increasing number of income streams

- Excel file imports
- Website payments
- Call centre
- Standing Orders
- Direct Debit
- Charity Shops
- Fundraising Events
- Online fundraising platforms
- Postal donations

Data entry, re-entry and accuracy

- Paper receipt books
- Reconciling 5000+ standing orders
- bank statement
- Excel sheets
- Overworked supporter care team
- Duplicate donors
- Data entry staff

Reporting: How much have we raised?

- Collating donations totals from multiple sources
- Multiple versions of truth
- In the dark campaigns
- Pledges vs actuals for ROI and decision making

Responsiveness to supporters and donors

- Need for immediate information about donations made across different income streams
- Receipts
- Donor communications and marketing preferences

Gift Aid processing turnaround time

- Submitting our gift aid claim with confidence

Limited budget

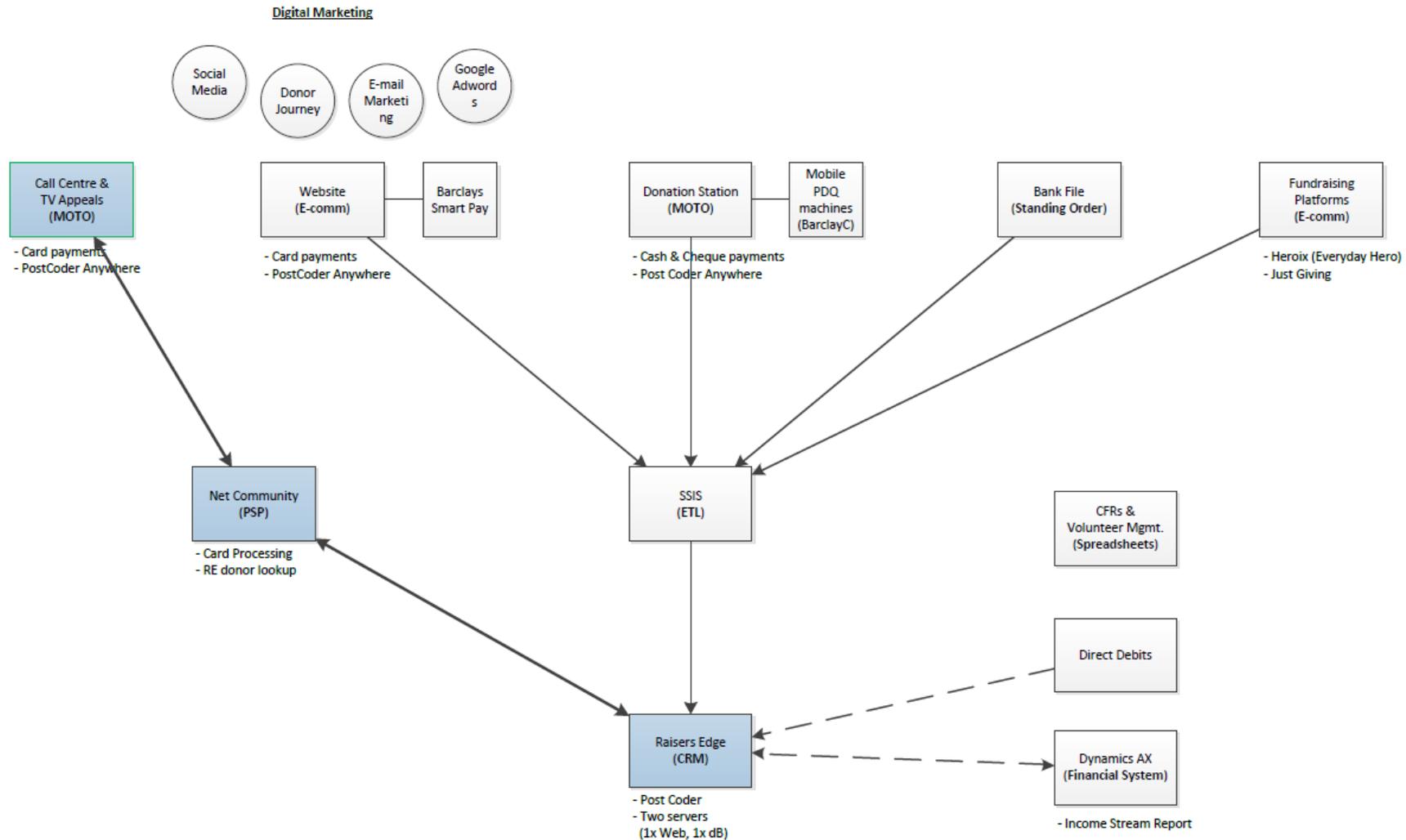
# Integration



ETL

To integrate donor and donations from all channels to single database

# Automated donations



# What's Next



- Need for Marketing automation and fundraising administration
  - Only donations data not enough
  - Daily sync not enough
  - Raiser's Edge performance and capabilities
- Technology upgrade as a business transformation programme driven by new strategy

*Thank You*

**Any Questions?**

# Case study



**Danny Attias, CIO, Anthony Nolan**

**Transforming our legacy into a digital future**

Presentation not available online

# Discussion and feedback





# Review and close