

## Case Study: Children England

### All about Children England

Children England is the leading membership organisation and collective voice for charities working with children, young people and families.

They provide a wide range of support to members and the wider community sector (VCS) enabling organisations to strengthen and enhance their work with individuals and groups involved in the welfare of children.

### The background

The social welfare law charity Lasa carried out a comprehensive review of Children England's IT structure in May 2013 and made recommendations on how it could be improved.

Among those recommendations was the selection and implementation of an improved CRM system. Lasa further recommended that Children England engage an independent consultant to help with the procurement process. Lasa specifically mentioned Infoworks as we are well known in the sector to be both knowledgeable and unbiased.



### The story of the project

#### Initial meeting – agreed scope and project plan

We held an initial meeting with the Children England project manager to agree the scope of our involvement and how we would go about the project.

We agreed we would:

1. Establish their system requirements and prepare a Request for Proposal to send to potential suppliers.
2. Identify a list of about ten potential suppliers and invite them to submit a proposal.
3. Send the Request for Proposal to those suppliers.
4. Provide brief comments on the supplier proposals received.
5. Bill no more than four days for this work.

#### Held workshop with key people to identify requirements

We kicked off the project with a workshop session, held as part of Children England's regular team meeting. The objective was to determine their requirements (essentials/preferred/wildest dreams) from a CRM system. We only had up to two hours, so concentration and focus from all concerned was paramount.

The workshop was structured in three sections:

1. Introduction and scene setting by the Infoworks consultant, to clarify what was required from all the attendees.
2. Divide the attendees into small groups to discuss requirements for the four key areas:
  - Members and other customers
  - Communications
  - Website
  - Events

The group work was arranged so that each group answered the same six key questions:

1. What processes need supporting?
2. What are you trying to achieve?
3. What does the system need to store (data) and do (functionality) to help you achieve your aims?
4. What outputs do you need? (Reports, mailings, etc.)
5. What links are required to/from other processes/systems?
6. What other "usability" factors are important?

This meant that the reporting back and challenge session was structured in the same way for everyone, making it easier for people to understand and contribute, as they had already thought through the same issues.

3. Report back and challenge. Each group reported back to the whole team, who were able to challenge the outputs and suggest more ideas, as appropriate.

All the outputs were collected by the Infoworks consultant for use in creating the first draft of the Request for Proposal.

*"The Infoworks workshop was a very quick and easy way to identify all our key requirements, and enabled us to clarify and agree the relative priorities of our requirements in a very short time."*

## Created the Request for Proposal.

After the workshop we created a first draft Request for Proposal incorporating all the outputs from the workshop.

As well as the system requirements we ensured the Request for Proposal included issues which had not occurred to the workshop participants based on our extensive experience of similar projects (e.g. Software acceptance procedures, Escrow agreement, financing options, etc.). This is where we can add extra value in preparing these sort of documents.

Children England reviewed our first draft, and were happy for it to be sent out after only a couple of cosmetic amendments.

*"The Request for Proposal produced by Infoworks was a very professional document which included all our requirements, and also several additional issues which we would probably not have identified on our own."*

## Sourced suppliers and phoned them all to pre-qualify them

With more than twenty years' experience in the sector, Infoworks has an extensive knowledge of the companies operating within it. Based on this, allied with some more research, we were able to put together

a list of suppliers who could provide solutions across the whole range of options – standard packages, customisable packages, and completely bespoke systems.

We then phoned every company on our list. The reason for this was twofold:

- To avoid sending the Request for Proposal to any supplier who would not be interested in sending in a proposal due to pressure of work or a budget mismatch. (Several did exclude themselves at this stage.)
- To raise the interest of suppliers – it takes a lot of time and effort to put together a proposal, and we wanted to maximise our chances of a response being given a high enough priority to meet the Children England deadline.

*"Infoworks drew up the supplier shortlist for us, using their extensive knowledge of the sector, and emailed the Request for Proposal to them. They also called all the suppliers, and answered many of their initial queries. All of this saved us a lot of time."*

## Sent out the Request for Proposal

Having finalised the list of suppliers, and whetted their appetite, we emailed the Request for Proposal to each of them. We also fielded some basic questions from them, but any detailed enquiries were directed to the Children England project manager

## Reviewed all responses and sent comments to Children England

The supplier responses were all sent directly to the Children England project manager, which he then forwarded to Infoworks as we had previously agreed to briefly review and comment on the responses. We were happy to do this as an extra input into the short-listing process. This is where our experience can again add extra value.

We reviewed the proposals and provided brief comments on each one in time for the Children England review meeting.

*"When responses came in, Infoworks reviewed them and gave us their unbiased opinion. This was an additional service they provided free of charge, as part of their commitment to ensuring we found the best possible supplier for our needs."*

## Post-project follow-up

Although Infoworks' involvement in the project ceased when we had provided our comments on the proposal, we have kept in touch with the Children England project manager.

Having been involved in the early stages, we are interested in seeing how it all works out – not just from idle curiosity, but mainly because it will help us identify what works/doesn't work in the procurement process, and incorporate any necessary changes into future proposals and supplier reviews.

Learning never ends!



Children England were so happy with what we did, they had a party to celebrate – or maybe it was just their office Christmas party ...