Our Approach

Focus	*Revenue*	*Reach*	*Cost*
Vertical	**Fundraising**	**Partnerships**	**Operations**
Horizontal			
Connect	Donor Data Integration	Partnership Data Centralisation	Volunteer Data Integration
Analyse	Donor Segmentation & Personalisation Model	Partnership Scoring Model	Service Demand Forecasting Model
Consume	Fundraising & Engagement Dashboard	Partnership Monitoring Dashboard	Operational Management Dashboard
Underpinned by:			
Data Strategy & Operating Model			
AI Readiness & Analytic Maturity			
Cloud Infrastructure Foundations			
Management & Governance Principles			
Advanced Analytics & AI Capabilities			
Training, Enablement & Knowledge Share			

Our approach to driving value in TSI follows a consistent and repeatable pattern across three core verticals: **Fundraising, Partnerships, and Operations**. For each area, we implement a framework that focuses on connecting data, analysing it for actionable insights, and delivering those insights through dashboards. This framework allows us to address key areas of Revenue, Reach, and Cost, optimising each organisation's ability to deliver on its mission.

A Consistent Pattern for Success

We follow a structured methodology across all verticals to ensure seamless integration and value generation:

- **Connect**: In each vertical, the first step is to centralise and connect critical data sources. Whether it's integrating donor data, partnership communications, or volunteer information, we ensure that organisations have a consolidated view of their key activities. This allows for a unified dataset that serves as the foundation for advanced analytics.
- **Analyse**: Once the data is connected, we build models that provide deep insights into organisational performance. These models are tailored to each vertical. For Fundraising, this could be a segmentation and personalisation model for donors. For Partnerships, it's a scoring model to rank and assess the health of partnerships. For Operations, we leverage service demand forecasting models to ensure that resource allocation matches future demand.

- **Consume**: The final step is to deliver insights in a consumable and actionable format. We develop intuitive dashboards that empower organisational leaders to make informed decisions. These dashboards provide real-time access to key metrics, from fundraising engagement rates to operational capacity and partnership health.

Developing Initial Products and Expanding Through Partnerships

Our initial product offering within each vertical includes a full suite of connectors, integrations, models, and outputs. This foundational solution is designed to deliver immediate value by improving data access, analytics, and decision-making for TSI organisations. However, we understand that each organisation is unique, and further refinement may be necessary to tailor these products to specific needs.

To this end, we aim to **partner with TSI organisations to co-develop and refine** these solutions. We envision a collaborative process where we work directly with TSI organisations, often offering **subsidised projects** to ensure that charities and non-profits can affordably implement these advanced solutions. These partnerships not only allow us to improve the initial solution but also enable us to **expand the number of systems integrated**, building a more robust ecosystem for data management.

Underpinned by Foundational Capabilities

Each offering is underpinned by critical technical and strategic capabilities to ensure success:

- **Data Strategy**: Ensuring data is centralised, structured, and ready for analysis.
- **AI Readiness**: Preparing systems for advanced analytics and machine learning.
- **Cloud Infrastructure Foundations**: Leveraging the scalability and flexibility of cloud systems to support integrations.
- **Management & Governance Principles**: Implementing robust data governance to ensure compliance and trust.
- **Advanced Analytics & AI Capabilities**: Deploying cutting-edge models and algorithms to derive actionable insights.
- **Training & Enablement**: Providing ongoing support and training to ensure users can maximise the value of the solution.

Through this structured and repeatable process, we ensure that TSI organisations can optimise their operations, maximise fundraising, and strengthen their partnerships, all while ensuring future scalability and continuous improvement.

Fundraising Analytics Platform

Summary: Maximise donor contributions and engagement by utilising data analytics to optimise fundraising campaigns.

Offering Overview:

- **Donor Data Integration**: Implement a centralised system that pulls together donor data from various platforms such as email newsletters, social media platforms, and online donation portals like JustGiving. This ensures that all donor interactions and touchpoints are captured, providing a full view.
- **Donor Segmentation & Personalisation**: By applying predictive analytics, donors can be grouped based on behaviours such as donation frequency, response to campaigns, and social media engagement. Long-time donors can receive personalised communications, while new donors are targeted with content that encourages recurring donations and improves retention.
- **Fundraising / Engagement Dashboard**: Develop dashboards that provides updates on key metrics such as total donations raised, campaign conversion rates, and donation trends by region or demographic.

Delivery Scope for Estimation:

- **Number of Systems (3):** Identify the key systems from which donor data will be pulled with consideration for data/API connectivity/availability.
    - Email marketing platforms (e.g., Mailchimp, Constant Contact); Social media fundraising (e.g., Facebook Fundraisers); Online donation platforms (e.g., JustGiving, GoFundMe); CRM or donor management systems (e.g., Blackbaud, Donorbox); Website analytics (e.g., Google Analytics, tracking donation pages).
- **Number of Datasets (10):** Each system will contribute its own datasets (new or merge):
    - **Donor Information**: Names, emails, donation amounts, giving history.
    - **Campaign Data**: Campaign types, engagement data, conversion rates.
    - **Transactional Data**: Payment methods, frequency of donations, donation amounts.
    - **Demographic Data**: Age, location, social media engagement.
- **Model Estimation (10 days):** Define the criteria for segmenting donors, such as:
    - Donation frequency (e.g., one-time, recurring, lapsed donors).
    - Contribution amounts (e.g., small, medium, high-value donors).
    - Engagement levels (e.g., email opens, social media interaction).

    - Demographics (e.g., location, age, donation channels).
- **Number of Reports (3)**
    - Executive summary dashboard
    - Fundraising performance and donor segmentation
    - Campaign-specific insights

Estimate of effort (38 days)

- Discovery and Design: 3 days
- Data Build and Testing: 13 days
- Segmentation Model Build and Testing: 10 days
- Report Build and Testing: 9 days
- Quality Assurance and PM: 3 days

Partnership Intelligence Suite

Summary: Drive stronger, data-backed partnerships by evaluating existing collaborations and identifying new opportunities for growth.

Offering Overview:

- **Partnership Data Centralisation**: Create a central repository that stores all partnership-related data, from communication records to collaboration outcomes and joint project details. For example, if a charity collaborates with corporate sponsors or community groups, this system will log the number of projects completed, the funding received, and the impact of each partnership. This makes it easy to assess the overall success of partnerships over time.
- **Partnership Scoring Model**: Develop a data-driven model to score partnerships based on historical success indicators such as joint funding amounts, project completion rates, and alignment with the charity's strategic goals. For instance, partnerships that have resulted in repeat funding or high-impact programmes could be scored higher, helping to prioritise future collaborations.
- **Partnership Monitoring Dashboard**: Use an interactive dashboard to monitor ongoing partnership performance, such as tracking the number of joint initiatives completed, co-branded campaigns, and financial contributions from partners. This dashboard could be particularly useful for charities working with multiple stakeholders.

Delivery Scope for Estimation:

- **Number of Systems (3):** Identify the key systems from which partnership data will be pulled with consideration for data/API connectivity/availability.
    - Partnership management or donor relationship systems; Financial systems tracking funding received from partnerships (e.g., accounting software like Xero); Communication platforms (e.g., HubSpot, Outlook) for logging interactions with partners; Project management systems tracking joint initiatives (e.g., Asana, Trello); External data sources (e.g., public partnership records, CSR reports).
- **Number of Datasets (10):** Each system will contribute its own datasets (new or merge):
    - **Funding Data**: Partnership funding history, amounts contributed, and frequency of donations or contributions.
    - **Project Data**: Outcomes of joint initiatives (e.g., project completion rates and results)
    - **Communication Data**: Email records, meeting logs, partnership agreements.
    - **Impact Data**: Results tied to specific partnerships, such as the number of beneficiaries served, geographic reach, or programme success metrics.

- **Model Estimation (10 days):** To provide a model to score and rank partnerships based on key performance metrics including:
    - **Funding Success**: Partnerships that have generated significant or repeat funding
    - **Project Success**: Partnerships that lead to completed projects with positive outcomes
    - **Strategic Alignment:** Partnerships that align with the mission and long-term goals.
    - **Collaboration Frequency**: Track ongoing engagement, including how often the charity collaborates with the partner (e.g., co-branded campaigns or events).
- **Number of Reports (4)**
    - Partnership Overview (with scoring and health metrics).
    - Financial Contributions (tracking funding over time).
    - Project Success (monitoring joint initiative outcomes).
    - Collaboration Activity (tracking interactions and engagement).

Estimate of effort (41 days)

- **Discovery and Design:** 3 days
- **Data Build and Testing:** 13 days
- **Scoring Model Build and Testing:** 10 days
- **Report Build and Testing:** 12 days
- **Quality Assurance and PM:** 3 days

Operational Efficiency Platform

Summary: Enhance operational efficiency by integrating volunteer data, forecasting service demand, and providing actionable insights through operational management dashboards. This solution empowers charities to better allocate resources, improve service delivery, and optimise engagement.

Offering:

- **Volunteer Data Integration:** A centralised system to integrate and manage volunteer data from various sources, such as registration platforms, shift management tools, and performance records. This integration provides a full view of volunteers and their availability, skills, participation, and engagement.
- **Service Demand Forecasting:** A data-driven forecasting model that predicts future service demand based on historical trends, seasonal patterns, and external factors. For instance, a charity offering food distribution might use the model to forecast higher demand during holiday periods or economic downturns, allowing them to better allocate resources and staff to meet service needs.
- **Operational Management Dashboard:** A dynamic dashboard that provides an overview of key operational metrics, including volunteer utilisation, service capacity, and resource allocation. Including insights such as how effectively volunteers are being used, the number of services delivered, and upcoming resource needs based on demand forecasts.

Delivery Scope for Estimation:

- **Number of Systems (3):** Identify the key systems from which partnership data will be pulled with consideration for data/API connectivity/availability:
    - Volunteer management systems (e.g., VolunteerHub, Better Impact); Service management or beneficiary tracking systems (e.g., Salesforce for Nonprofits); Resource allocation or scheduling systems (e.g., WhenToHelp, Deputy); External data sources (e.g., public data on demand patterns, economic indicators).
- **Number of Datasets (10):** Each system will contribute its own datasets (new or merge):
    - **Volunteer Data:** Hours worked, availability, skill sets, engagement level.
    - **Service Demand:** Historical service usage, number of beneficiaries, locations served.
    - **Resource Allocation:** Available resources, current service levels, and capacity.
    - **External Data:** Demand factors such as weather, economic data, or seasonal trends.
- **Model Estimation (10 days):** Develop a model to forecast service demand based on key input variables, including historical service data, seasonality, and external economic factors.

    - **Historical Trends**: Analyse past service data to detect patterns in demand.
    - **Seasonal Factors:** Integrate known seasonal demand shifts.
    - **External Drivers**: Incorporate external data that might impact service needs.
    - **Volunteer Availability Correlation**: Link the demand forecast with available volunteer resources to optimise service delivery without over or under-staffing.
- **Number of Reports (4):**
    - **Volunteer Utilisation Report**: Track volunteer hours, engagement rates, and how efficiently volunteer resources are used across different services.
    - **Service Demand Forecast Report:** Predict future demand for services based on historical and external data, allowing for proactive planning.
    - **Resource Allocation & Capacity Report**: Monitor current resource usage and forecast future needs based on demand predictions.
    - **Operational Management Dashboard**: Provide a real-time view of key operational metrics, including service capacity, volunteer availability, and forecasted demand.

Estimate of effort (41 days)

- **Discovery and Design:** 3 days
- **Data Build and Testing:** 13 days
- **Forecasting Model Build and Testing:** 10 days
- **Report Build and Testing:** 12 days
- **Quality Assurance and PM:** 3 days