

CASE STUDY

Creating Charitable Value and Impact:
› **MANAGING
FUNDRAISING
PROJECTS WITH
PRINCE2 AGILE**



INTRODUCTION

The Smith Family is an Australian charity with a history spanning over 100 years, dedicated to partnering with children, young people and their families to help them overcome educational inequality caused by poverty.

Its approach supports families from a child's pre-school years until they finish their education.

And its **Learning for Life programme** connects students and their families with a sponsor who provides financial support for essential education, expenses, support from a Smith Family team member to problem-solve any barriers to education and access to a variety of short programmes mentoring opportunities.

The organisation, which has just under 1.000 employees, is working to **a five-year plan (2023-2027) to help tens of thousands more young Australians overcome educational inequality caused by poverty.**

CHALLENGE

The fundraising and delivery teams at The Smith Family utilise multiple agile methodologies, including Kanban and Scrum, to manage their projects. For significant projects related to sponsorships and fundraising aimed at meeting growth targets, which often involve higher levels of risk and uncertainty, there exists a necessity for **the team to have capabilities for ongoing re-evaluation of projects to ascertain their value addition.**

Dylan Rose, National Manager of Customer Experience and Supporter Operations, highlighted the organisation's constant backlog and limited financial resources, underscoring the need for a methodology that allows for the assessment of project viability at any given stage.

In response, **key members of the fundraising team have undertaken training and certification in PRINCE2 Agile.**

This initiative is part of the organisation's strategy to bolster its five-year plan, which includes:

**deepening
programme focus
to improve student
outcomes**

**leveraging
partnerships to
digitise programme
delivery**

**enabling
digital inclusion
for all Learning
for Life students**

**growing
reach and
influence**

**growing
sustainable
funding**

**empowering
The Smith
Family team**

**investing
in digital, technology
and data**

“Add biggest value of adopting best practice is the combination of moving to agile delivery methods but with PRINCE2 Agile showing us how to nail down requirements and the associated ROI, de-risk and increase the velocity of delivering value. We do this only through a clear understanding of what we're doing and why.”

Dylan Rose, National Manager Customer Experience and Supporter Operations

SOLUTION

HOW IS PRINCE2 AGILE BEST PRACTICE SUPPORTING THE CHARITY'S FIVE-YEAR PLAN?

PROJECT SET-UP

The fundraising team has implemented **a template that facilitates the initiation of an idea, solicits input from stakeholders, and specifies achievement metrics** to ascertain project feasibility prior to seeking investment. This template ensures that **all involved parties have a clear understanding of the expected outcomes** prior to the formulation of the business case. It clarifies the definition of success for delivery teams, which may include the development of digital solutions for customer interaction or the creation of portals for students and sponsors that support self-updates and simplified communication. With numerous digital projects underway, it is necessary for each project to identify the target digital audience, determine the appropriate digital solutions, and evaluate the potential value generated.

AUTONOMY AND DECISION MAKING

Due to the restricted staffing resources within the charity sector, it is imperative to delegate **increased autonomy to individual workers**. This empowerment, however, must be **paired with clearly established decision-making protocols**. An example of such protocols includes the management of change requests on a CRM system, which should align with recognised best practices. Enhanced autonomy facilitates innovation by predominantly focusing on continuous improvement. Team members are required to submit their innovative ideas and are encouraged to implement novel solutions during development cycles. Failures in these initiatives provide learning opportunities that contribute to accelerated project execution in subsequent endeavors.

UNDERSTANDING REQUIREMENTS

Prior to the implementation of PRINCE2 Agile, the fundraising team encountered significant difficulties in comprehending and delineating requirements, which are defined as a stakeholder's needs or expectations essential for advancing a project. An illustrative case involved a project aimed at exploring various donation methods available to the charity. **The lack of a clear definition of success stalled the project's progress**. During this period, workshops were conducted to pinpoint existing challenges, leading to the incorporation of identified requirements into the business case. Subsequently, sixteen key areas were recognised for improvement. These improvements were anticipated to enhance efficiency for relationship managers and augment the donor experience, notably through the development of a communication portal for students and corporate donors.

The adoption of the PRINCE2 Agile methodology facilitated effective management of uncertainties, allowing for the extraction, prioritisation, and governance of pressing issues. This approach enabled swift decision-making processes without incurring risks. The application of PRINCE2 Agile substantially improved project outcomes by ensuring a clear focus on elements that maximise value, as delineated in the project requirements from the onset.



RESULTS AND BENEFITS

ENSURING OUTCOMES ARE DELIVERED

The deployment of PRINCE2 Agile best practices has enabled The Smith Family to maximise revenue and minimise costs, supported by quantitative data. The organisation maintains a retention rate of approximately 90% for regular donations from supporters, a notably high figure for a charity. The primary objective is to deliver value through conversion and supporter satisfaction. A data-focused approach facilitates continuous improvement and sharpens the focus on impactful actions, enhancing support for more disadvantaged students.

BOOSTING TEAM COLLABORATION AND MOTIVATION

The very high morale among the delivery teams is linked to PRINCE2 Agile: having vision and value statements and creating outcomes in ceremonies means the teams are clear on what they must do and the value they're creating. Resultingly, they have become much more productive and collaborative.

COMPETITIVE ADVANTAGE

Positive collaboration and motivation among the team are attributed to the implementation of PRINCE2 Agile. This approach, characterised by the formulation of vision and value statements alongside the execution of structured ceremonies, has significantly enhanced clarity regarding team objectives and the value of their contributions. Consequently, there has been a notable increase in productivity and collaboration among the delivery teams.

OPERATIONAL COSTS REDUCTION

The charity observed a 163% increase in donor interactions over a five-year period. This increase was managed through digitisation and project implementation without corresponding increases in direct headcount, despite the growth in workload. Consequently, the efficient allocation of donor funds was maintained, prioritising programme support and assistance for disadvantaged students over administrative expenditures.

“Charities have higher risk because we’re not a commodity that a donor or potential donor needs. So, we need to be clear that we’re using donors’ money for students’ benefit – and we have to prove that. By using best-practice methods it means we are ensuring and monitoring success and using funds as effectively as possible.

On top of that, we’re always short of time and have limited funds to meet changing customer expectations. Therefore, if we’re not using best practice and focusing on value, we won’t succeed. PRINCE2 Agile helps us to ensure that what we’re working on is valuable and has impact. If a project won’t deliver value, we drop it.”

Dylan Rose



Become the next success case!

Connect with us to share your journey and challenges. Together, we can craft a solution that propels your organisation forward. Your story could inspire our next success case study.

peoplecert.org



PeopleCert is the global leader in the certification industry, with a product portfolio of global best practice frameworks and certifications including ITIL® and DevOps Institute for IT & Digital Transformation, and PRINCE2® for Project, Programme & Portfolio Management, as well as language qualifications through LanguageCert. Our certifications are delivered across the globe, empowering people and organisations to achieve what they are capable of, improving organisational efficiency and realising their life ambitions through learning.