

# **T Level Technical Qualification in Management and Administration**

## **Employer-Set Project - Brief**

**(8715-033)**

**First teaching from September 2022  
Version 1.0**

## **Project brief**

### **The employer**

EducateGrowth was granted charitable status in August 2017 in the UK. It is an ethically driven organisation; the charity was set up to provide education and supports efforts that promote sustainable living and conservation.

EducateGrowth Trustees have identified a number of operating and financial risks and have outlined steps to address them. This includes preparing to improve its return on investment (ROI) by increasing its digital fundraising engagement. This will require investment in the use of Social Media, Customer Relations Management and/or Donation platforms. The required technology/tools must reach a wider audience and improve collaboration and quality of communications in a targeted and efficient manner.

### **The project**

You are one of four Project Co-ordinators working closely with the Project Manager and a team of Charity Administrators.

Your role is to determine a solution to support the charity in achieving its charitable aims through expanding the use of digital technologies to raise awareness of its charitable activities and objectives.

You will research potential Funding, Social Media Trends and Digital Technologies/Data Tools that can bridge the gap to new sponsor/donor experience. You will use your planning and project management skills to outline a solution for EducateGrowth. An extract of business information from the organisation and the business case for the project have been provided to you.

## EducateGrowth Trustee Report dated 30.04.2020

### Details of the type of governing document and when it was established:

Trust deed dated 02/08/2017

**Charitable Objectives:** To use its funds for any charitable purpose that supports education and sustainability in the UK and globally.

*Mission:* We believe that the way the Earth's resources are distributed is inequitable. If managed sustainably, there are enough resources for all. Our mission is to educate and work with local groups to overcome poverty and safeguard future self-sufficiency of resources.

*Vision:* Making a genuine difference to the lives of others.

*How we work:* Through direct delivery in the UK, and through the use of our partner organisations globally.

### Activities/achievements performance and public benefit - How the charity spends its money

The trustees always ensure that the programmes we undertake each year are in line with our charitable objectives and are cost effective. We refer to the Charity Commission's guidance on public benefit to do this.

#### Emergency Aid

We regularly receive many unsolicited emergency relief donations when media coverage is high. We have a contingency plan for this emergency relief and necessary fundraising capacity to support this work. Last year (2019), we distributed over £58,000 worth of donated food, blankets and clothing.

#### Other Programmes

We have helped run community programmes to support students in Ghana to become IT literate. We provided remote volunteer mentoring which hugely improved their opportunity for employment and self-sufficiency after school.

Working with other charitable partners such as IDigtrees, we have supported conservation volunteers to plant 29,000 trees in rural communities.

Our two UK offices have worked with a variety of school and college students through providing lectures and seminars based around world development issues. The total programme cost was £42,000 which reached 600 students, against a plan for 500 students and 20 local groups.

The team has actively been lobbying MPs campaigning on environment and sustainability issues. We are pleased to have supported Whole Earth to campaign in persuading overseas government to increase restrictions on tree logging-deforestation to help rebuild Ecosystems globally.

### **Grant making policy**

Applications for grants are not invited. Instead, our project staff develop the programmes annually, identifying whether it is most effective to deploy our own staff and resources or whether a local partner is preferable. Those organisations active in the target area are reviewed for their track record, financial transparency and operational capability. Potential partners that meet the criteria are contacted and a dialogue initiated to see if they would act as partners.

### **Plans for the Future**

To continue to do our best to provide aid in the UK and globally, gathering donations and transforming lives.

### **Our People**

- 10 Trustees and 1 Treasurer are together responsible for strategy and determining how aid is distributed, appointed and reappointed at four yearly intervals
- 1 CEO - responsible for the daily operation of the charity and manages the staff of the charity on behalf of the trustees.
- 1 Project Manager
- 4 Project Co-ordinators
- 1 Marketing Co-ordinator
- 10 Charity Administrators
- 250 Volunteer(s) globally

**Professional Advisors and independent examiners:** ACIE approved Charity Auditor, ABC Bank Plc, Charity Solicitor, Fund-raising Consultant

### **Fundraising/Trading/Trustee Payments**

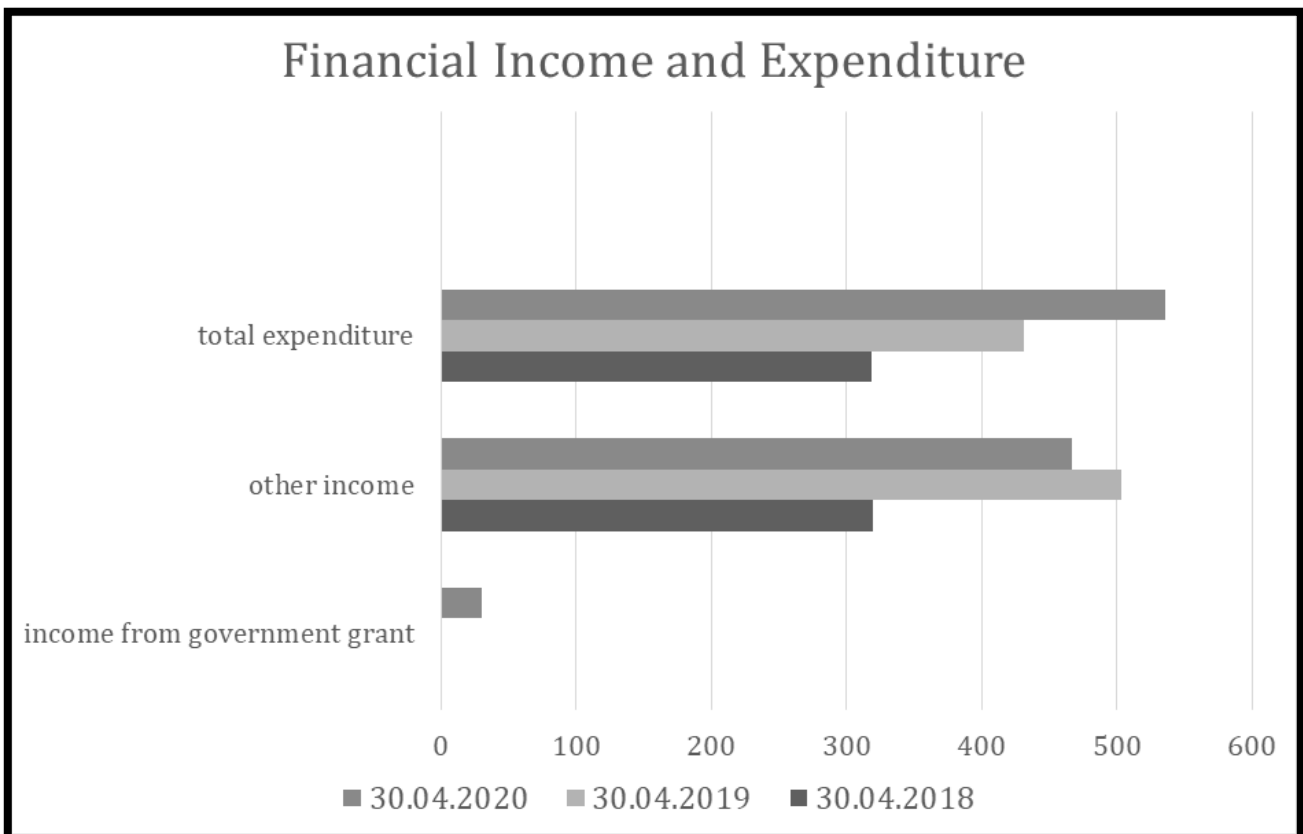
- This charity raises funds from public and commercial participators
- 1 Trustee is also a director in a subsidiary
- 1 Trustee receives payment or benefit from the charity
- 17 paid members of staff

**Trustees' responsibilities in relation to the financial statements:** The trustees are responsible for preparing the Trustees' Report and the financial statements in accordance with applicable law and United Kingdom Accounting Standards. The law applicable to charities in England and Wales requires the trustee(s) to prepare financial statements for each financial year which give a true and fair view of the state of affairs of the charity.

**Funds:** Made up of:

- Restricted – Donor defined, specified how to be spent in form of grants to pay for a project.
- Unrestricted – General Funds, disposal to spend on charitable objectives. Designated funds are unrestricted funds set aside that are earmarked by our trustees for a particular purpose.

EducateGrowth seeks to encourage donations through volunteer fundraising and marketing. Fundraising activities are not restricted to events alone and include affiliations with business partners in retail and tourism. The cost of fundraising has increased due to the charity supporting disaster relief campaigns and the new 'EnviroVillages' campaign involving newspaper advertising.



### **Donated Goods, Volunteers and other donated services**

1. Those goods donated for resale produce income in the trading subsidiary and this is recognised when they are disposed of.
2. Those goods donated for onward transmission to beneficiaries (mainly clothing and food) are included in the statement of financial activities.

**Foreign currencies:** Transactions in foreign currencies are recognised at the rate of exchange at the date of the transaction. All exchange differences are recognised through the statement of financial activities. The charity does not own any non-monetary assets abroad.

**Accounting Practice:** Financial statements are prepared under the historical cost convention and are in accordance with trust law, applicable accounting standards and the FRS102 Statement of Recommended Practice (SORP) "Accounting and Reporting by Charities", issued in Jan 2016.

**Risk management:** In light of the Covid-19 pandemic, we have cancelled some planned 2020 fundraising events, and have seen reduced outputs, delays and cost increases as a result. We estimate a loss of a third of our income by 2022. It is now more important than ever to find safe ways to raise money to support our services and its social impact. All significant activities are subject to a risk review in line with the Charities Act, 2011.

## Business Case – EducateGrowth

Date: January 2021

Submitted by: EducateGrowth

### PROJECT GOALS

To expand the use of digital technologies to raise awareness of our charitable activities and objectives with a restricted budget.

### ISSUE

We have a strong brand reputation and have been actively campaigning to support the charitable sector. This has involved educating others to understand the importance of our work in order to help sustain and maintain the sector, both in the UK and globally. In the last year, due to the impact of external factors, we have seen a reduction in the number of charitable donations, with the total amount donated reduced by 30% compared to the previous year. This has been identified as a major risk to meeting our charitable objectives. We must add value for money.

### OPTION

We have the opportunity to build on our digital technologies to increase awareness, collaboration and income in line with our charitable aims. Our stakeholders include donors, the general public, organisations, volunteers, partners, benefactors, staff, trustees, activists and researchers.

### CONSTRAINTS & RISK

- Technology solutions are unable to deliver required results – likelihood Medium/High Impact
- Additional expenditure may be needed. Budget: Restricted - £24,000
- Small Teams/varied or limited digital skills set - likelihood Low/High Impact
- Time – whether implementation of the new technologies/ system is achievable within 12 – 14 weeks – likelihood Medium/High impact

### DELIVERABLES – (WHAT WE HAVE)

Digital technology and communication methods we currently use are outlined below:

Current website including:

- About – Our Mission, FAQs, E-Shop (own brand and partner brand merchandise)
- Projects Overview
- Get involved – Donate, Volunteer, Resources
- Collaboration & News Articles and Blog

Website process:

- Online donation form
- Online merchandise shop

Current communication methods:

- Newsletter, subscription and HTML mailer; Blog with comments RSS
- Collaboration Resources – Articles, Blogs, Reports, Partner Research

## WHAT WE NEED

We need you to recommend a solution that will improve and expand our digital engagement with considerations for the following:

- Social Media must engage and connect with our stakeholders and aid collaboration with our partners to optimise user impact and promote our charitable aims.
- Data Management must provide data to gain insights to drive better strategic decisions, protect data, and improve operational productivity.
- CRM system must connect with our stakeholders and convert website visitors, and help the team optimise and prioritise tasks, review marketing activities and aid compliance.

Alternative options that may be free, made for commercial use or are designed as open-source software, can be considered, ensuring both value for money and quality with potential options.

## BENEFITS

- *Operational:* cost savings; improved productivity/team optimisation and prioritisation of tasks; clearer reporting and audits to aid compliance and protection of data.
- *Financial:* improved strategic decision making; new revenue from increased donations and increased margins to support our charitable aims; wider opportunities for campaigning that can influence political decision makers; better targeting of marketing activities.
- *Market:* wider connection and collaboration with target audience; increased market awareness; enhanced quality of services.
- *Customer:* improved stakeholder satisfaction; increased donor retention; loyalty with our donors; volunteers and partners.
- *Staff:* improved job satisfaction; culture; increased staff retention.

## COST CONSIDERATIONS

*People:* salaries of project/admin staff, outsourced parties, training.

*Physical:* tools including computers, phones, servers, network.

*Marketing:* advertising/branding, promotional materials, PR and communication.

*Organisational:* operational down time, short term loss in productivity.

*Services:* software as a service, consultancy service, new or increased services required.

## EXCLUSIONS

- Training

## POTENTIAL PARTNERS

As part of the feasibility study, we have identified the following technology and supplier partners:

- CRM Platforms – Salesforce.com; weare4c.com
- Charitydigital.org.uk are offering discounted rates
- Social Media platforms Pulsar, Hootsuite, Buffer and TweetDeck
- Go.donate – Online donation platform
- Give Penny - Cloud engage – Virtual fundraising

**Sign off: I Globa (Acting for the Board of Trustees)**



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