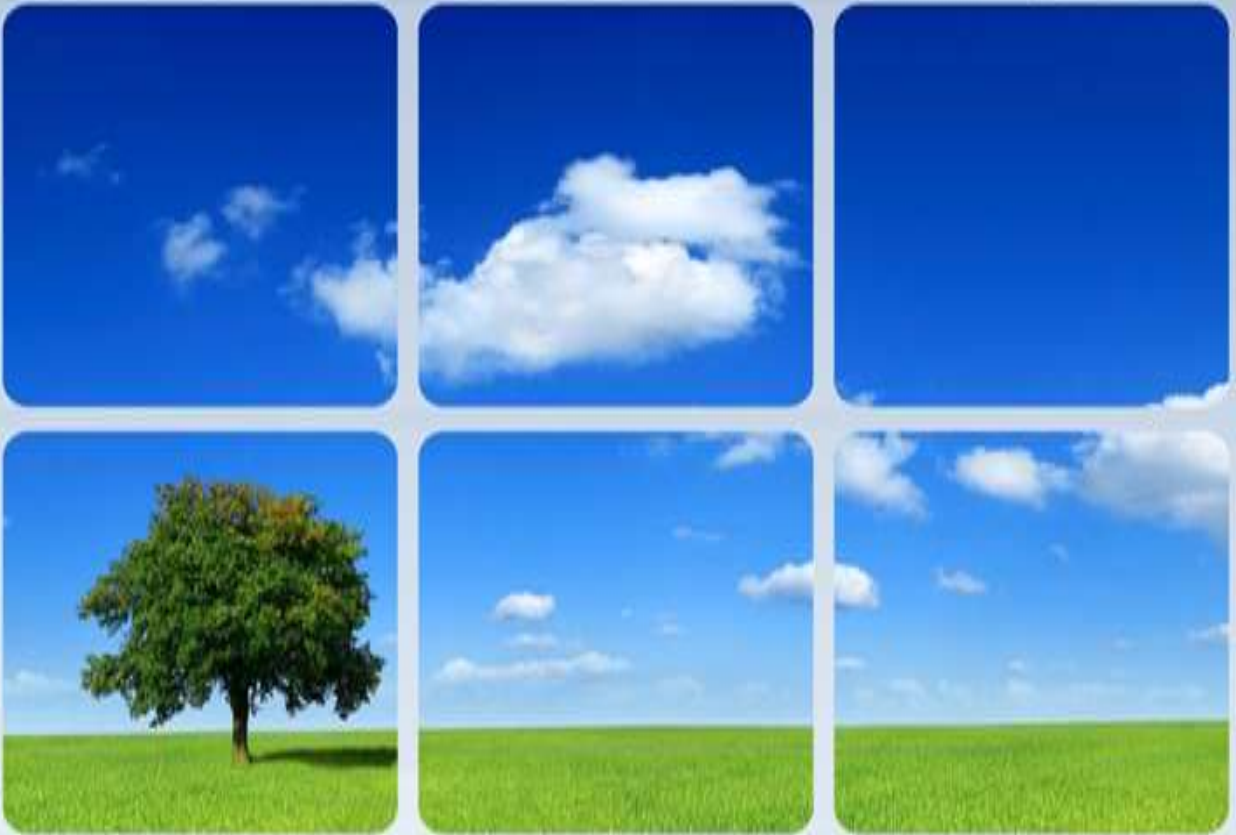


meritgroup



Case Study:
Data management

Introduction / Background

Save the Children is one of the UK's largest charities. It has a long standing reputation for effective emergency aid and long term solutions across a range of countries where the life and livelihoods of children (and their parents) is extremely difficult.

CCR is a leading fulfilment house and offers donation management services to several of the UK's leading charities.

The Challenge

Save the children had a requirement to digitally store the donation coupons received by their supporters over the past number of years.

- 1 They required the capability to review and track the donations from regular contributors and build patterns around these supporters. This intelligence would prove helpful in focusing further fundraising efforts.
- 2 Digitising all donations would enable the charity to quickly handle any queries from their supporters.
- 3 Many donations were 'gift aided' thereby generating additional income through the government's Gift Aid tax scheme. However, the Inland Revenue audit process required that the charity should be able to select sample Gift Aid claimants and show a valid contribution coupon on which the gift aid was claimed.
- 4 There was a sizable volume of documents to process within a very tight time frame, preceding the first audit.
- 5 There was an existing database of donors and it was important that the new donation forms being handled did not result in the entry of duplicate records into that database.

With over four hundred thousand donation forms, this was a significant challenge.

- 6 The minimising of administrative costs for any charity is an important one in terms of providing resources to those who require them and indeed to the charity's reputation for effectiveness.

Project Risks

There were three main challenges which were overcome by Merit in delivering this project:



Avoiding the creation of duplicate records, which would ultimately lead to a very poor quality database from which future marketing initiatives would be driven.



The scanning and loading of 426,000 images into a searchable system presented a host of technical challenges.



The data capture and processing of hard written forms with a high degree of accuracy within a tight timeframe.

Transferring the Process to Merit

CCR had a master database with 1.5m donor details and had 462,000 images of gift aid coupons. CCR were unsure about the number of these donor details which already existed in the master database.

In order to mitigate the risks outlined above and overcome the challenges facing the client, Merit set up and transitioned the project in the following way.



Technology Solution

In order to mitigate the risks outlined above, Meritgroup developed its own software solution to enable the processing staff to:

- View the scanned images in rapid succession
- To quickly capture the core data fields
- As the fields were captured, the system retrieved any close matches from the master database. Processing agents could view all possible/close matches and select an existing record, or continue to enter the fields as a new donor. This helped avoid duplicate entries.
- Developed using VB and SQL, the system was tailored to maximise production efficiency (over 100 records per hour) and reduce costs.
- The fields captured enabled the image files to be viewed in a web based image vault later on.
- This software system was released with source code to CCR / STC



Staffing

In order to meet the very tight deadline Merit worked with a local Indian agency to provide additional temporary staff to deliver the processing work.

The agency relationship was closely policed by Merit with:

- Agent evaluation and selection undertaken by Merit managers
- All training undertaken by experienced Merit processors
- On the floor supervision by Merit staff during processing hours

This meant that we developed access to a flexible staff resource and one that was under Merit control for the duration of the project.



Quality Assurance

We deployed three layers of quality assurance to ensure a high degree of accuracy:

- Agency QA staff conducted large sample size checking on an agent by agent basis
- Merits own internal QA team coached and supervised this agency QA resource. The Meritgroup QA team worked with the agency QA samples to calibrate, guide and check the integrity of the agency quality team
- CCR conducted a further set of checks on a twice weekly basis to offer further assurance the level of checking

Benefits to the Client

1

STC had a clean, updated database with all the details of new donors, linked to images of their contribution forms (using the fields indexed by Meritgroup).

2

STC (And their auditors) can now search for any donor information from the database with ease, using the software which was developed by Meritgroup.

3

The retrieval of images is a lot easier now since each image is indexed to a record in the database. This enabled the charity to deploy a secure, web based image vault to facilitate online access to the donor images.

4

The job was completed in quick time (2.5. months) without having to invest in any sophisticated software.

5

Meritgroup handed over the software to CCR for further deployment and development.



CCR were very pleased with the way the software was developed by Meritgroup in order to enable the processors take intelligent decisions. They were also pleased with the speed at which the job was done and at the high levels of accuracy that the team in Meritgroup achieved on such high volumes.



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