

The British Academy enhances interaction with Fellows and the wider public with help from Hart Square

Hart Square's troubleshooting, project management and training expertise benefits institution's operations

Championing the humanities and social sciences

Established by Royal Charter in 1902, the British Academy is an independent, self-governing fellowship of nearly 900 scholars, elected for their distinction in research and publication. The purpose of the Academy is to inspire, recognise and support excellence in the humanities and social sciences, throughout the UK and internationally, and to champion their role and value. The Academy's roll call of past Fellows includes many of the greatest British names of the 20th Century, including William Beveridge, A. J. P. Taylor, C. S. Lewis and Henry Moore.

The Academy is significantly expanding its public engagement activities, promoting its growing range of events and publications to stimulate and inspire future generations of scholars. Having a robust CRM (Customer Relationship Management) system and an interactive website – with integration between the two – is absolutely essential to these activities.

Integra CRM

The Academy selected the Iris Integra CRM system and had expertise in-house to manage both that and its website. However, at a crucial point when the Academy was trying to implement new Integra database functionality and enable website integration, two key internal resources left the institution – which meant the Academy had to try and 'plug the gap' as quickly as possible.

In May 2011, following a conversation with Iris, the Academy contacted Hart Square, independent CRM specialists with a successful track record in Integra implementations for membership organisations. Tim Brassell, the Academy's Director of Communications, takes up the story: "We contacted Hart Square and it became clear that their Integra knowledge and their extensive project management services would help us achieve the successful roll-out of the web phase of the project. We knew that this would not be a simple

Key services provided

- Integra CRM consultancy
- Project management and timely completion of work on the online part of the Academy's Integra contacts database
- Liaison and negotiations with Integra and website suppliers
- Managing and advising staff on all aspects of the web phase of the database implementation project
- Bespoke guidance, advice and training.

process, and we needed someone to take the lead. Hart Square gave us the assurance we needed."

The services Hart Square agreed to undertake included:

- Project management and the effective and timely completion of work on the online part of the Academy's Integra contacts database
- Leading the Academy's liaison and negotiations with Iris and its website supplier (BOCC)
- Managing and advising Academy staff on all aspects of the web phase of the database implementation project.

Importance of integration

"The contacts database is crucial to our organisation, so we placed a high level of trust in Hart Square



and its consultant Rob Dobell to help us manage and deliver this very important project,” added Tim Brassell. It was important to create a facility within the database (OLS) system which allowed visitors to the website wishing to attend Academy events or receive regular information about its work and activities to register, and then be automatically added to the Integra contacts database.

Key benefits

Hart Square was able to provide the following benefits to the British Academy:

- Maximised the use of, and benefits from, Integra CRM
- A fully integrated CRM and website operation
- Fellows able to access/update their profiles
- Secure access to documents and information
- Website visitors able to register for Academy events.

In addition, Hart Square would help create a new, separate (but branded) ‘Fellows Portal’ on the Academy’s website. “This would for the first time allow our Fellows to log in and update their details directly themselves, and also access paperwork specific to the roles they have at the Academy,” explained Jennifer Hawton, Development Officer at the Academy. “We also wanted Hart Square to help us create an effective facility for online event booking for both Fellows and other users, as well as a facility for online surveys.”

Meeting challenges

There were, of course, some challenges along the way, not least enabling the Fellowship

to log on to a secure portal to update their own details and provide additional information about themselves and their interests. This required the experience of website integration with the Integra system which Hart Square’s specialists were able to provide.

Within the new portal, the intention was to enable the Academy’s Fellows to interact with the Academy, and with each other, within a secure environment. Hart Square was able to configure the Integra database OLS module to enable:

- Visitor registration
- Secure logon
- Profile updates
- Event booking.

In addition, Hart Square was able to help staff familiarise with the ‘Document Downloads’ part of the system to support the secure publication of documents to various discrete Sections and Committees within the Fellowship, and to support the process of electing new Fellows each year.

Hart Square’s experts also advised on back office functionality, such as Donations Management through Accounting Office and payment processing for events, as well as configuration of some Attributes associated with online functionality.

With public events (around 50 a year) being a growing and key part of the Academy’s operations, Hart Square was able to provide bespoke guidance, advice and training on use of the Integra Events module. “Rob Dobell also authored bespoke user guides for a number of key functions used on a regular basis by the events team. He also provided technical advice to the IT team relating to the

configuration and support of the Integra tools and infrastructure,” added Jennifer Hawton.

Benefits realised

The project went live on time and within budget. “Hart Square knew what was possible, and overcame a number of obstacles by finding solutions or workarounds,” said Tim Brassell. “They were patient and helpful in explaining technical issues to us without being technical and, with their guidance, we minimised issues with users.”

He added that working with Hart Square had successfully achieved the Academy’s objective. “What we now have is a properly integrated CRM and website operation that enables Fellows to access and update their profiles, and access secure documents and information, and for visitors to our website to register for Academy events or to receive regular information from us.”

He concluded: “Hart Square, and in particular Rob Dobell, took the time to understand how we as an organisation worked and what our needs were. They were able to provide support and guidance to existing users throughout the duration of the project, and saved us a lot of time and hassle.”

“It was money well spent and we are very happy to recommend them.”
