



Invitation to Tender CRM System and implementation

1. Introduction

The Integrated Education Fund (“IEF”) invites tenders for the provision of a Customer Relationship Management (CRM) System to support fundraising, donor stewardship, event management, and cross-departmental collaboration. The successful applicant will enter into a contract with IEF for the delivery, implementation, and support of the CRM system.

2. Background

The Integrated Education Fund (IEF) was set up in 1992 as an independent charity supporting the growth and development of Integrated Education in Northern Ireland. Integrated Education brings students of different backgrounds—such as abilities, cultures, or socio-economic groups—together in the same classroom. It aims to promote equal opportunities, reduce segregation, and foster mutual understanding among children. Its mandate is drawn from the expressed demand from parents and schools who seek an Integrated Education for their children and pupils.

Between 1992 and 2025, the IEF raised and invested over £30 million from supporters and donors to advance Integrated Education, contributing to an increase in Integrated schools (from 16 in 1992 to 76 in 2025), and has supported a substantial evidence base on the benefits of a more integrated system of education.

In 2024 the organisation underwent a review of finance systems and introduced a new accounting software package. Other data for fundraising, administration and outreach purposes is currently stored on multiple Microsoft Access and Excel spreadsheets. This system is no longer fit for purpose, and the organisation would like to implement a new CRM system to enable us to store and manage data in a more secure manner that is productive to the charity. We do, however, have a secure back-end system for our Integrate My School website, which be kept separate and not incorporated into the new CRM.

3. Objective and Purpose

To procure and implement a CRM system that:

- Centralises supporter and donor data.
- Enhances segmentation and stewardship.
- Integrates with existing platforms (Eventbrite, Mailchimp, JustGiving, CAF). Integration with the website is not necessary at this time.
- Supports GDPR compliance and secure data management.

- Enables network mapping and supporter journey tracking (including Individual donors, regular givers, high net worth individuals, trusts, business, volunteers and schools on a journey to integration.)
- Facilitates reporting, analysis, and campaign management.
- Can enable reconciliation with our finance system (Liberty)
- Enhances event management.
- Enables the stewardship of specific contacts to be restricted to certain users.

4. Required Experience and Skills

Applicants must demonstrate:

- Proven experience delivering CRM solutions for charities.
- Expertise in data migration, GDPR compliance, and user training.
- Ability to provide ongoing support and system updates.
- Experience integrating CRM systems with third-party platforms.

5. Timeline

We aim to start this project in July/August 2026, aiming to complete by October 2026

6. Deliverables

The successful applicant will be expected to deliver:

- Prior to the start of the project - a formal action plan / schedule / Gantt chart as appropriate for the full implementation of the project with clear deadlines.
- A fully functional CRM system tailored to IEF's needs.
- Up to 15 user profiles with different access levels.
- Data migration from existing systems (Access, accounting system (Liberty), Excel)
- Staff training and user manuals.
- Integration with existing platforms.
- Ongoing support and maintenance (costs should be included in tender separate to implementation).
- A service line agreement outlining ongoing support to maintain the CRM each year, with technical support as and when required.

7. Award criteria

Awarding of the contract will be dependent on:

- Your understanding of the project details
- Functionality and user-friendliness
- Cost-effectiveness and transparency

- Technical capability and innovation
- Data security and GDPR compliance
- Support and training provision
- Your relevant experience (including with UK or RoI registered charities)

The above criteria are not listed in order of importance. Your application will be assessed according to each of these criteria.

8. Submission Instructions

The Tender must be clear, concise and complete and should not exceed more than 15 pages of A4, excluding cover page, summary, any appendices and references. The IEF reserves the right to mark a Tenderer down or exclude it from the procurement if its Tender contains any ambiguities or lacks clarity. Tenderers should submit only information that is necessary to respond effectively to this ITT. Unless specifically requested, extraneous presentation materials are not necessary or desired.

Tenders must be submitted by email to katie@ief.org.uk no later than 12 noon on 15th June 2026. If you are shortlisted, you will be invited to deliver a short presentation in the week commencing 23rd June 2026.

9. Contract Management and Review

You should nominate a Lead who will be directly responsible for the delivery of this project and will act as a main point of contact.

You and/or the Lead should report directly to Katie Pollock, Head of Fundraising at the IEF, on the progress of the project.

10. Budget

A budget of up to £18,000 (including VAT) is available for the implementation of this project. This is to include all set up costs- including software, licencing and hosting.

Annual running costs, again to include all software or licencing costs, are not expected to exceed £6,000 (Including VAT).

11. Contract Period and Payment Terms

On approval of valid invoices submitted to the IEF, staged payments will be made on completion of key milestones/deliverables as follows:

- 10% advance payment
- 90% on satisfactory completion of the project

If requested, we would consider changing the payment schedule to reflect current market demands.

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