



Virgin Money Leverages Open Source Business Intelligence to Help Charities and Fundraisers Give More, Do More.

Background

The Virgin Money Giving story. Virgin Money, the UK-based financial services arm of the Virgin Group of companies, was established in 1995. The company now has more than two million customers and offers a wide range of financial products—including lending and credit, savings and investments, and insurance—to customers in the UK, North America, South Africa, and Australia.

Virgin Money’s mission is to “make everyone better off” by doing things that are good for business and good for customers and society. When it became the primary sponsor of the London Marathon, Virgin Money saw an opportunity to maximize the event’s success in terms of charitable funds raised.

A new, not-for-profit Virgin Money Giving (VMG) unit was founded and charged with delivering a highly functional—but low cost—online fundraising service. The service would enable charities and event participants to solicit and collect donations more easily, while maintaining a very low cost model to ensure the highest possible flow of funds to the charities.

Challenge

Ideally, the VMG solution would provide an easy way for fundraisers—typically, event participants—to promote and collect donations online, with their own online fundraising page, emailing tools, and links with social networking media. The solution would also provide significant benefits to charities and event organizers, both as a means to recruit and register participants, and as an efficient, secure and reliable means to collect donations.

To be successful, the solution would need to attract involvement from a wide range of charities –including large, experienced organizations with unique requirements and existing fundraising systems. That would require a strong, easy-to-use, flexible payments processing solution, plus the ability to integrate with any number of existing technologies. The final solution would need to be robust enough to meet the

FAST FACTS

ORGANIZATION

Virgin Money Giving

INDUSTRY

Financial Services / Not-for-profit

SOLUTION

Web-based fundraising

RESULTS

Rapid adoption by charities and fundraisers—and an additional £5 million in funds usable by the charities for every £100 million donated

“Jaspersoft’s feature-rich technology provides us with a cost-effective, high value BI solution for major projects. Jaspersoft can support thousands of users and its advanced features set it apart from alternative vendors in addressing the needs of dynamic organizations. It’s all standards-based and we were able to apply the skills we had developed elsewhere. It was very easy for us to absorb the Jaspersoft technology into our system architecture”

Jeremy Walters
 Director, Systems Development,
 Virgin Money Giving

CASE STUDY

needs of the large charities, flexible enough to adjust as those needs evolved, and sufficiently easy-to-use to attract and engage both fundraisers and donors.

“While discussing requirements with charities we learnt how sophisticated they are at managing events, maximizing the value of donations, and engaging with fundraisers, donors, and other supporters,” says Jeremy Walters, Head of Systems Development at VMG. Much of that capability comes, says Walters, from leveraging management information to analyze how well charitable events perform—by region, by type of event, by time of year, and by the marketing programs used to promote them. “Fundraising is the lifeblood for most charities, so why wouldn’t they be really smart at it?” notes Walters.

Clearly, charities would also demand plentiful, powerful management information reporting. In their early research with charitable organizations, the VMG team heard it repeatedly: get the front end right, and do the processing efficiently, yes—but most of all, be sure to deliver sophisticated, flexible reporting and analysis capabilities.

While smaller charities would probably be satisfied with a range of standardized reports, the larger organizations would likely want the ability to create their own reports with as much flexibility and ease of use as could be managed.

A final but critical requirement was low cost: as a not-for-profit organization—one whose sole mission was to enable more funds to make their way to the charities that need them—there was no room for unnecessary technology spending.

Building the “99% Open Source” Solution

Fortunately, VMG’s IT team is experienced with modern, open, standards-based technologies. To keep costs low without sacrificing functionality or performance, the team quickly established a preference for open source technologies for Web application and presentation, database management, data integration, and Business Intelligence (BI).

The solution took shape. Much of the system is a set of integrated Web applications, leveraging Apache and JBoss technologies. Data storage and management is handled with MySQL. The core application is coded in Java, and was developed by the VMG IT team.

Functionally, a “front-end” Giving Management component orchestrates most of the key business processes: charity registration, fundraiser page creation, payment collection, and other functions, while a back-office component completes payment processing and other more computational and transaction-focused tasks.

To handle operational reporting and analytics, the team considered using the existing



VMG’s service is easy to use, and funnels more of each donation to charities

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proprietary BI and reporting solution used elsewhere within Virgin Money. It was determined, however, that integration with the rest of the VMG solution would be significantly more difficult with this proprietary solution.

Additionally, with the prospect of serving thousands of charities, each with multiple users, licensing costs would have been prohibitive.

Walters goes further: “If I were building our entire BI infrastructure from scratch today, I probably wouldn’t go down the proprietary road. We find the open source technology to be quite comparable in terms of performance, capability, feature sets—and the costs are much lower.” The VMG team evaluated leading open source BI platforms—and chose Jaspersoft for its ease of integration, and because it better met the more robust reporting requirements anticipated for the larger charities.

The IT team found the Jaspersoft technology to be stable, high-performing, and robust. Walters reports: “It’s all standards-based, it does what it says on the tin, and we were able to apply the skills we had developed elsewhere. It was very easy for us to absorb the technology into our system architecture.” VMG has created about 20 standardized reports, and another 20 flexible data extracts which can be used by larger charities to link with their internal systems.

Jaspersoft’s ease of integration has been a significant advantage. “The great thing about Jaspersoft’s open source technology is that we were able to effectively present all the components of our system in a single-sign-on environment,” says Walters. “The reporting is branded consistently with our core sites, and the charities don’t know they’re using a different server and different technology to do reporting. I don’t think we could have done this with a proprietary solution.”

Results

The Virgin Money Giving site has been well-received by charities and fundraisers alike. The service is powerful and easy to use, and fundraisers can establish their own page in less than five minutes, then use it as long as they wish, for any event in which they participate. They can register for events, reach out to friends and colleagues through email and Facebook, send post-event thankyou messages, and much more. Meanwhile, charities have the reporting—and efficient funds collection—they need.

There’s one other important benefit that VMG offers: low costs to the charities.

“We’re a not-for-profit, and we built everything with open source technology,” says Walters. Because of this, for every £100 million donated through our service, an additional £5 million goes to the charities.* Yet we still provide industrial-strength, state-of-the-art functionality.



Borne of Virgin Money’s London Marathon Sponsorship, VMG supports hundreds of charities



Once charities register and fundraising begins, they can use Jaspersoft-powered reporting tools to track and optimize fundraising efforts

Walters reports steady, rapid growth in the number of charities and fundraisers using the site—and expects that to grow significantly in the next year.

“It all sounds too good to be true, doesn’t it?” jokes Walters. “But it was a real success story.”

About Jaspersoft Corporation

Jaspersoft’s open source business intelligence is the world’s most widely used BI software, with more than 11 million product downloads worldwide and more than 12,000 commercial customers in 100 countries. Jaspersoft provides a web-based, open and modular approach to the evolving business intelligence needs of the enterprise and is the only BI vendor enabling true multi-tenancy while providing a common platform for on-premise, virtualized, SaaS and Cloud deployments. Jaspersoft’s products span the continuum of core BI requirements, including production reporting, operational & embedded reporting and analysis, interactive end-user query & reporting, dashboards and mash-ups, data analysis, and data integration. Its BI software is updated constantly by a development community of more than 135,000 registered members working on more than 350 projects, which represents the world’s largest business intelligence community.

More information is available at www.jaspersoft.com and www.jasperforge.org.

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