



# CiviCRM for Maths Hubs

Engaging Schools. Strengthening Teaching.

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# Our CiviCRM background

## The first project

- National women's organisation — national membership plus local groups
- Multiple relationship types in one system
- Built a Joomla website with fully integrated CiviCRM
- Powerful for engagement — but managing the server and software updates was heavy lifting for one client



## The breakthrough

- Asked to help a Maths Hub with their website
- Spotted CiviPlus offering CiviCRM as software-as-a-service
- No more server management or software updates — all handled
- Same powerful platform, none of the infrastructure overhead. Perfect.

# What is CiviPlus?



## Trusted CiviCRM Specialists

Compuco created CiviPlus after more than a decade of working with nonprofits and the global CiviCRM community.

## Why CiviPlus Was Created

Organisations needed the power of CiviCRM without the technical complexities. Simplified hosting, security and maintenance.

## All-in-One Solution

Drawing on years of experience as leading CiviCRM experts, contributors, and Gold Partners, Compuco built CiviPlus as a feature-rich, out-of-the-box solution powered by the best of CiviCRM and enhanced with their own innovations, including an integrated Member Portal.

## Accessible & Affordable

Delivering an accessible, cost effective, fully managed CRM platform that is scalable, powerful and designed for every kind of nonprofit, from charities, to membership associations, service delivery, education, arts and more

# What can CiviPlus do?



Manage contacts



Take payments online



Track fundraising opportunities



Manage memberships



Events, CPD conferences



Drag and drop email builder



Case management/  
Service Delivery



Task dashboards



Reporting and analytics



Unlimited custom field creation



Surveys and petitions



Manage volunteers



Track applicants



Grant management



Self service portal

The Royal Society  
of Literature



Association  
of British  
Neurologists

# What are Maths Hubs?

40

government-funded hubs  
across England

1000s

of schools  
and teachers  
in each hub's  
region

1

shared goal:  
strengthen  
maths teaching  
nationally

## How they work

- Run CPD programmes — Teaching for Mastery, Mastery Specialist development
- Recruit and support teachers as Mastery Specialists across their region
- Run school-to-school support networks and research groups
- Track and report school engagement data to DfE and NCETM

# The challenge before CiviCRM

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## Spreadsheet chaos

Contacts split across dozens of sheets — schools, teachers, event lists all separate and inconsistent

## Separate booking systems

CPD events managed in a different tool (or by email). No connection to contact records.

## Separate mailing system

Newsletters sent from a standalone tool. No link to who attended what, or who needed following up.

## No joined-up picture

No way to see which schools were engaged, lapsed, or had never participated — across all programmes at once.

# Why CiviCRM? One system for everything.

## All contacts in one place

Schools, teachers, workgroups, partners — one record, one source of truth

## Events — without limits

Multi-day, multi-location workshop events with online registration built in

## Mailings — fully integrated

No separate tool. Smart Groups mean the right message reaches the right people

## No more booking system

CiviEvent replaces standalone tools. Registrations linked directly to contact records

## Smart Groups

Dynamic lists that update automatically — target by programme, school, or engagement level

## No server to manage

CiviPlus handles hosting, updates and security. We focus on strategy, not infrastructure

# Delivering the solution

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1

## Data migration

Pulling together years of contacts from spreadsheets, old booking systems and email lists — cleaning, deduplicating and importing into CiviCRM

2

## Building the platform

Configuring CiviEvent for workshops, setting up Smart Groups and mailing templates, building the contact structure for schools, teachers and workgroups

3

## Training the team

Hands-on training for hub staff — not just how to use the system, but how to think about engagement data and use it to drive outreach

4






## Ongoing by CiviPlus

Hosting, software updates and security handled entirely by CiviPlus. We stay focused on strategy, engagement and development — not server management

# Smart Groups & mailings for better engagement

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## Smart Groups

-  Dynamically updated — no manual list management
-  *"Schools not yet active this academic year"*
-  *"All Primary Maths Teachers at Darlington Schools"*
-  *"All headteachers at secondary schools that have never engaged with Teaching for Mastery"*
-  Criteria change, the group updates automatically

## Targeted mailings

### Right message, right people

Send only to the group it's relevant to — no blanket emails that damage engagement

### No separate mailing tool

CiviMail is built in. Contact records, groups and campaigns all in one place

### Track opens & clicks

See who engaged — feed that back into groups and follow-up strategy

# Replication, shared learning & new insights

## Replicate across hubs

- Same platform, same structure — rolled out to multiple hubs
- Each hub gets their own instance, configured to their region
- Onboarding a new hub is now a known, repeatable process

## Shared learning

- New features and developments shared across all hubs
- One hub's smart group idea becomes available to all
- Improvement benefits the whole network, not just one site

## New insights with Claude

- Using Claude AI to analyse school engagement data
- Surfaces patterns that weren't visible in raw CiviCRM reports
- Identifies which schools are at risk of disengaging — before it happens

# What we learned

1

## Start with clean data

The first job is agreeing what a 'school' or 'teacher' record actually means before you import anything. Garbage in, garbage out.

2

## SaaS changed everything

CiviPlus as a managed service removed the single biggest barrier to recommending CiviCRM again. No server overhead means faster delivery and happier clients.

3

## Build for the workflow

CiviCRM is deeply flexible — shape it around how the hub actually works, not around how the default setup works. Training is as important as configuration.

4

## The platform is a shared asset

Rolling out across multiple hubs means every improvement benefits all of them. That changes the economics and the motivation for investment.

# Thank you

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Questions?

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