

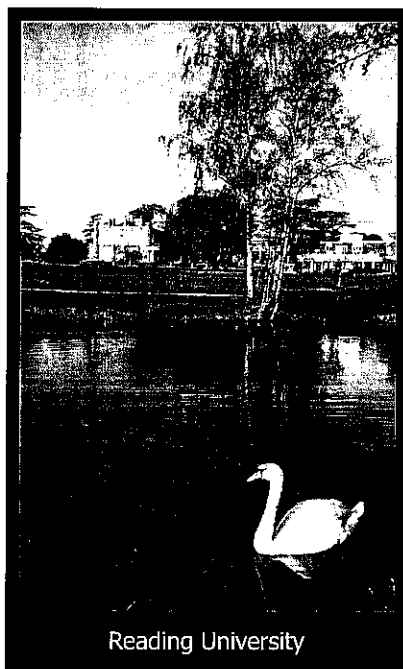
TRUST & FOUNDATION news

The magazine for independent grant-makers in the UK

Issue 71 – Spring 2005

ACF's Conference 2005

ACF's conference brochure, published in March, was warmly welcomed by members with a steady stream of booking forms coming in to the ACF office. The conference, to be held from **6-8 September 2005 at Reading University**, is a unique opportunity for all those involved in grant-making trusts to meet with others facing the same concerns, to share experiences, and discuss the issues that really matter. Geoffrey Shepherd, Conference Chairman and Chief Executive of Guy's and St Thomas' Charity said: *"Our provocative theme Cash Machine or Development Agency? – The role of foundations in the 21st century is intended to challenge delegates to examine their assumptions and consider the position of their own trust or foundation against others. While we hope that the conference will stimulate and pose questions, it is not our intention to direct delegates towards a particular approach – and in many ways the conference provides*



Reading University

an opportunity to celebrate the variety of approaches towards grant-making.

"Whatever the particular circumstances of your trust, whether it is large or small, and whether you are a trustee, adviser or member of staff, you will find something here to inform your practice and help you in your work."

The many speakers at the conference include:

- **Tim Cook OBE**, Clerk of the City Parochial Foundation 1986-98. Other grant-making experience includes Comic Relief, the Big Lottery Fund, and BBC Children in Need. Tim has written extensively on grant-making issues.
- **Geraldine Peacock CBE**, Chair designate of the Charity Commission and formerly Chief Executive of the Guide Dogs for the Blind Association.
- **Dr Geoff Mulgan CBE**, formerly director of the Government's Strategy Unit and head of policy in the Prime Minister's Office, and now Director of the Institute of Community Studies.
- **Luther M Ragin Jr**, from The FB Heron Foundation in New York City, a private foundation with assets of \$250 million, who will share his experience of Mission Related Investment.

...continued on page 4

contents

editorial/noticeboard	2	information technology	22-23
news	3-11	opinion	24-28
features	12-13	'Effective' and 'affective' giving	
Creating social wealth		Dissent, independence and risk - the challenge for grant-makers	
issue based networks	14-21	events diary	29
Commission for Equalities and Human Rights		policy issues	30-32
Penal affairs		Full cost recovery	
Capacity building, Soloists		reviews	32
regional meetings	21	VAT for charities	
Funders and advisers working together			

GIFTS

Richard Lally of Optimally continues his series of reviews of grant-making software by looking at GIFTS. The observations remain those of the author and not of ACF or *TFN*.

GIFTS is the grant managing software from MicroEdge. It is a modular, scalable system and as such it is potentially a suitable solution for any size and type of grant-making organisation.

The Core Module

In this review I concentrate on the core module which provides the following functions:

- Recording Grant Applications
- Recording Contact and Organisation information
- Producing Letters (Decline, Award, Request more information)
- Producing Summary Reports for Board/Review Meetings
- Scheduling Payments and Payment Requirements
- Managing Payments
- Producing End of Year and Ad-Hoc Reports

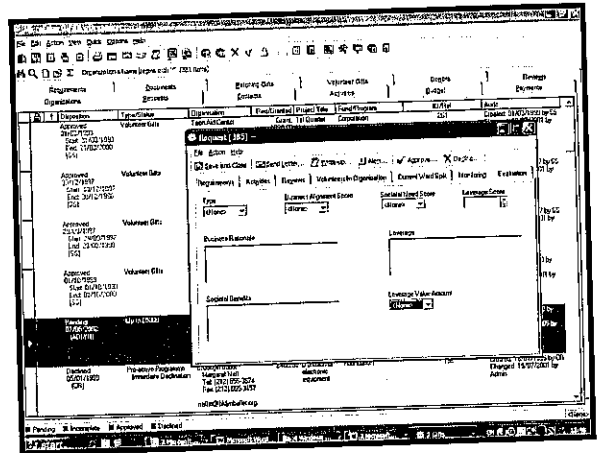
At the heart of the core module is the Organizer. When you first open the Organizer it is alarmingly blank – this is the first indication you get that GIFTS is designed very differently from most software. From the Organizer you can select the following folders:

- Organizations
- Requests (Grants and Grant Applications)
- Contacts
- Activities (eg Tasks/To Do items)
- Budget
- Payments
- Requirements (i.e. the obligations of the grantees)
- Documents (eg links to documents related to Requests)

Within a folder the search feature allows you to quickly select an item or group of items. You can then quickly see related items in another folder using the zoom feature. For example, you could select one type of grant in the Requests folder and zoom to show only those items in other folders (Organisations, Contacts etc) with links to those grants.

Users responsible for preparing summary papers for Board Meetings (or other review meetings) will benefit from the Write-up feature. This enables summaries of grants and grant applications to be prepared according to a variety of criteria (grant type, status, manager etc.). If you are blessed with a Board that is not too picky about appearances it might be possible to completely automate the production of Board Meeting papers.

After the Board Meeting the batch features of GIFTS make



it easy to change the status of a group of Requests in one go. Where decisions require letters are to be sent this can be completely automated or, if required, GIFTS can produce basic letters for each applicant which can be personalised before being sent.

With the Documents feature GIFTS provides a simple document management facility. The zoom feature means you can select a Request (or Contact or whatever) and then zoom to see all the relevant documents. I only wish you could drag and drop documents into GIFTS in the first place.

Other Modules

MicroEdge offer a range of add-on modules which increase the scope of the package into new areas or offer more functionality in areas covered by the core module. Below I summarize three of the add-on modules to give an idea of the possibilities.

The Customizer module is a tool for adding your own folders to the Organizer, and new data fields to folders. You can easily add your organisation's own requirements using this tool but beware: you can easily do more harm than

good with this tool if you do not think it through very carefully (my recommendation: make no changes to GIFTS until you have used it for six months).

The MyGIFTS module enables users to work with GIFTS over the internet (or an intranet).

The ReviewerConnect module allows reviewers to enter their reviews directly into the GIFTS over the internet.

Overview

MicroEdge tell me that the evolution of GIFTS has been heavily influenced by customer feedback. This is perhaps why I got the feeling when using the software that it was working with me.

The style of GIFTS is more like that of Contact Management

software (such as Act!) than that of most databases and as such users used to other software may take a little time to adjust to the GIFTS way. However, once you are familiar with the Organizer you realise that it puts you in easy command of all the information and processes available.

Some users might be uncomfortable at first with the "Americanisms" but I endorse the decision not to modify the package for UK users because it keeps the cost down and prevents errors being introduced during the anglicisation process.

The integration with Microsoft Office will be a bonus to many users. Those skilled in Excel will be pleased at how easy it is to import selected data from GIFTS; non-Excel users will be grateful for the

reporting and analysis features within GIFTS. Committed Outlook users will like being able to see their GIFTS activities in Outlook.

The cost of implementing GIFTS will vary enormously because of its modular nature and because some organisations will choose to customize it a lot and others not at all. It might be possible for a small organisation to implement GIFTS for less than £20,000 if they are just automating core processes and are willing to mould their process around GIFTS standard way of working. On the other hand, large organisations wanting to exploit many of GIFTS features and undertaking a large amount of customization might spend over £250,000 to get it just the way they want it. ■

Anthony de Lacey of Buzzacott responds:

The software is suitable for all organisations from small to large, having been developed over 20 years based on the ideas of former grant-makers working at MicroEdge, with input from

the users groups around the World including the UK. As an off the shelf package, used by over 2,000 grant making organisations, it has many advantages and each organisation has the ability to tailor the system to reflect their needs effectively and without the need for costly consultancy and programming costs.

As Richard commented, the software is modular and scaleable thus allowing an organisation of any size to decide which modules are right for them. Modules can be added easily at any stage. We have seen a great take up of the Internet Grant Application Module which allows our clients to receive applications via the Internet. Currently 10% of our clients have purchased the module and will collectively receive in excess of 12,000 applications via this module this year.

Richard mentioned the price range of GIFTS and as an example the Sir James Knott Trust, an ACF member, purchased the software, completed our standard training course and received some consultancy for a total cost of around £16,500 including VAT. Our clients benefit from the research and development, based

on best and current user practice, that such a large user base can support. These updates to the software are provided free of charge to users who have a maintenance and support contact. An example of these developments is the built in ability to allow GIFTS to connect to the soon to be released Guidestar web site.

Annually, when the maintenance and support contract is renewed, we undertake to visit free of charge each of our clients to review their use of GIFTS to ensure that they continue to get the maximum benefit from the software.

Client satisfaction is important to us, and to this end each year we conduct a Client Satisfaction Survey. Our most recently published results revealed that of the 45% of our clients who completed the return, 94% indicated that they rated our relationship as "good" or "very good" and 91% indicated that they would be happy to recommend us to other organisations.

Anthony de Lacey is chairman of Buzzacott Chartered Accountants, managing director of Buzzacott Computer Services Ltd distributors of GIFTS in the UK and Europe and a trustee of the Buzzacott Stuart Defries Memorial Trust – www.buzzacott.co.uk/bcs