



CLIENT STORY SIR JAMES KNOTT TRUST

Eliminating an outdated manual grant-making process, Sir James Knott Trust finds a streamlined, integrated approach in MicroEdge Essential GIFTS

Action, not words

Sir James Knott believed in 'action not words,' and his many generous gifts to charities were examples of this philosophy. In order that his charitable giving could continue after his death, Sir James provided funds for the Sir James Knott Trust, a registered charitable trust based in Newcastle upon Tyne in England. In recent years, grants have been given in support of the welfare of the disadvantaged, the young, the elderly, the disabled, education and training, medical care, historic buildings, the environment, music and the arts and seamen's and service charities. Grants totalling £1 million pounds sterling a year are made, funded out of income.

Outgrowing a manual system

The Trust receives about 800 applications each year, all of which are responded to by telephone or in writing by a staff of two. "We were using a complex manual system to administer grantmaking," states Vivien Stapley, who is Trust Secretary and manages all the administrative affairs of the Trust. "While it was very organized and the workflow was well-defined, it was time-consuming and quite complicated."

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-Vivien Stapley,
Trust Secretary

Inquiries were indexed via a card system-with all relevant information typed onto the cards using a typewriter. "We researched applications as much as we could, wrote to grantees for additional information, and generated a package for each application," tells Vivien. Trustee meetings were held every four months to determine which grants would be awarded. Each grant was assigned a number, and that number was also typed onto the index card. All correspondence, such as approval and denial letters to applicants, was accomplished using a PC, but none of the information was stored on the computer. As one can imagine, the process of pulling index cards and typing notes for every action, task and event was immensely onerous.

Even financial records were kept by hand in large general ledgers. Investments were tracked by hand, and when income came in it was recorded in the ledger and balanced using a double-entry bookkeeping system-a very tedious, painstaking process.

All that changed with Vivien Stapley. Vivien joined Sir James Knott Trust about three years ago, and after having first-hand experience with the manual process, she realized that their system needed a complete overhaul. In addition to the efficiency that could be gained from an automated system, Vivien also needed to free up time to perform other important duties, such as to visit with and assess potential grantee organizations, and to attend more funding fairs.

The search for an automated system

Vivien sought the opinions of other charitable organizations in the area, and discovered that many of them were using GIFTS® grants management system from MicroEdge. She went on-site to several organizations to observe how they were using GIFTS, and after doing so contacted Buzzacott, a UK-based consulting firm that sells and supports GIFTS solutions in Europe. Buzzacott is a successful, growing mid-tier accountancy firm that is rooted in London, with a tradition for providing professional, independent advice to a range of clients, including many charities and international corporations. More recently, Buzzacott has continued to grow and develop specialized teams servicing the needs of the charity sector and other professional practices as well as developing a flourishing IT consulting service.

Stephen Hart, Head of Sales & Marketing for Buzzacott, immediately recognized and presented a solutions overview of the substantial efficiencies that Sir James Knott Trust could achieve with an automated grants management system like GIFTS. Vivien found that the Trust's workflow and routines were quite similar to GIFTS, so a decision was made to implement Essential GIFTS, a streamlined version of GIFTS that provides effective grants management in an affordable, easy to use package. Buzzacott supplied the technical expertise to help the Trust select and install the right equipment and trained Vivien and her assistant on how to use Essential GIFTS.

Sir James Knott Trust's installation of Essential GIFTS was quite successful and they opted for one-on-one training. "The support from Buzzacott has been brilliant," raves Vivien. In addition, local area user groups offer peer support and serve as a sounding board for discussions.

Significant time-savings over the manual process

"The time-savings has been absolutely phenomenal, just wonderful," praises Vivien. "It's more efficient, and it enables us to identify missing requirements or check on history more easily. In fact, we now have ample time to go out and visit with constituents."

Presenting the best possible submission

It's also much easier for Sir James Knott Trust to process their applications. Even incomplete applications can be handled more efficiently, as they are tagged in the system for further information required. Now Vivien can easily pull up tagged applications, send an automated letter or make a phone call-steps to make sure that the applicant's proposal goes forward in the very best possible manner.

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Seamless integration with financial programs

Once the Trust implemented GIFTS, they also installed SAGE to help manage their finances. Since GIFTS is seamlessly linked to their financial package, they now have a smooth flow between their grantmaking process and their financial activities. Integrated reporting enables them to easily import donation data to SAGE. "Financial statements are easily and accurately reconciled," asserts Vivien. "What used to take days at the end of the month now takes us less than an hour!"

Equitable distribution of grants

The Sir James Knott Trust makes grants in three main areas-north, middle and south-and they try to make sure that the giving is evenly distributed between these areas. With Essential GIFTS powerful coding capabilities, the Trust is able to code grants according to various criteria, and to report on and graph their giving to make sure that it is even throughout the region and across the different types of programs and groups that are being funded. "It helps us stay as balanced in our giving as we can possibly be."

Improved due diligence

While all grants are made in the northeast of England, there are various local volunteer organizations, umbrella organizations that are very small and part of the community, that may not be registered in their own right, but acknowledged in the community. If there are any doubts about the group, the local community groups will not vouch for them. Recently, Vivien put Essential GIFTS to the test while assisting the Metropolitan Police in their investigation of suspect organizations.

"We use the built-in link to the English Charity Commission Register of Charities to research organizations more efficiently," says Vivien. In fact, some fraudulent groups were attempting to secure monies from various charitable organizations. "The Met Police sent a list around to charities to see if they had awarded any monies to these fraudulent groups," recounts Vivien. "One organization had been in touch, but we had not given them any money. However, we were able to provide this information to the Metropolitan police, to help them assess how widespread these bogus organizations were."

The final verdict

"We recommend GIFTS for its efficiency and transparency, for all other compliance and requirements, and to make your life easier," says Vivien. "It has totally streamlined everything we do, and we do everything in a better way."

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