

## GIFTS™ Halves Assessment Workload for Government Grant Makers

When Liz Daw joined Capacitybuilders as Head of Programmes, in September 2008, she inherited a grant management system that was struggling to cope with the mounting volume and complexity of applications.

Capacitybuilders leads government investment in Third Sector support services. Since 2006, it has committed £100-million to improving the quality of support available to charities, voluntary groups and social enterprises across England - vital work, seeing an upsurge in demand during the recession, but managed by a process that had become a bottleneck.

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When Liz arrived, grants to around 350 different organisations were being processed in hard copy, aided by a complex system of Excel spreadsheets. Four officers were taking nine weeks to assess applications.

### **Urgent: solution for manual gridlock**

Drawing on previous experience, Liz put GIFTS on a 12-system long-list

for grant management software. The contenders had an exacting specification to meet: the ability to carry out an initial assessment and monitor applications online, and an extensive search and reporting facility good enough to respond accurately to a parliamentary question in 12 hours. She also wanted automated functionality that would provide interaction with Outlook while enabling her to track the progress of individual applications. The end-game was to go paperless.

GIFTS was chosen from a short-list of three. "GIFTS actually looks like something you'd use everyday," says Liz. "Some systems we saw during the tender process were clunky, some just didn't seem logical. We wanted something that had sufficient flexibility that we could build or customise in the way we wanted."

### **GIFTS makes £7-million point**

GIFTS justified her faith. It proved easy for staff to understand, which shortened training time and enabled easy and early integration with an important new programme, the £7-million Modernisation Fund.

The fund targets grants on third sector organisations which need to adapt, merge or collaborate to survive in the current climate. Initially, it was administered with the aid of a website which allowed applicants to assess

their eligibility for professional help in deciding from the options available. GIFTS, with its online grant application module (IGAM), offered this and more. Not only did it manage applications but payments, too; within two months, staff had assessed all those who applied and made 820 awards.

### **Win-Win for programmes and clients**

GIFTS was now integrated with the rest of Capacitybuilders funding programmes. Form filling and manual checking was replaced by self-assessment, using an online, pre-eligibility questionnaire. As well as saving the applicants time, in three months it filtered out 50% who did not meet the criteria, literally halving the workload.

**"We've saved the equivalent of a full-time post both in time and cost"**

There were other benefits. Because GIFTS' IGAM module counts visitors to the Capacitybuilders' site, Liz could gauge interest and forecast the likely number of applications for a given grant. By running the programme through GIFTS early on, she could see if they were going to make their target, and so whether they would be able to spend their budget. Moreover, the

reporting function kept the Office for Civil Society much better informed; once applications were complete, the necessary paperwork could be done in an hour instead of the two weeks it used to take.

Not only is the system now paperless - it is self-fulfilling, guiding staff and applicants alike through a process which took Liz's team just half a day to design. Only one person is needed to assess initial applications; more than two weeks have been saved by automating acknowledgments.

### **Ease of operation makes for big savings**

The benefits of GIFTS cut both ways. As well as saving applicants time with the pre-eligibility questionnaire, it gives the successful ones an online account which, in Liz's words, "allows them to track and

judge their progress".

This creates a virtuous circle for Capacitybuilders. "My team now have more time for relationship building with clients. We've saved the equivalent of a full-time post both in time and cost," she says.

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If she does need extra manpower she can confidently use temps because GIFTS is so easy to learn. She relied on Buzzacott Giving Solutions for the initial set up and called the help-desk once; now she feels totally confident.

"What's great about GIFTS is that when we first started using it we could tweak things where needed - for example, when questions needed to be worded in a different way we could change the form without having to change anything elsewhere. We don't need an IT consultant, we can change things ourselves."

**For more information or to book a demo please contact:**

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GIFTS and ESSENTIAL GIFTS grant management software are uniquely available in Britain from Buzzacott Giving Solutions. Those who see parallels to their situation in the Capacitybuilders case-study should know that GIFTS is tailored to need. The Capacitybuilders' package includes the core module as well as PlusPack, which provides the flexibility to perform tasks in batches, Customiser, which allowed Liz Daw to capture outcome dates that were previously captured in spreadsheets, IGAM which facilitates online applications and Task Centre, which, as well as providing security for sensitive financial information, allows staff to check that applicants' bank details have been correctly entered online.