PANGAEA

Charities & Association Management Software

Case Study

The National Benevolent Charity
"Improved Grant Processing"

Background

The National Benevolent Charity (NBC) is a charitable organisation whose aim is to provide financial help to those experiencing hardship. It also manages supported-housing type accommodation in Tetbury, Gloucestershire and Old Windsor.

The core service which triggered the project is a welfare fund scheme (to help people buy essential items that will make a positive contribution to their day-to-day wellbeing).

We were referred to NBC who had asked for help in changing their business capability from a mainly paper based process to one which made use of technology. Specifically, they wanted to improve their responsiveness to applicants, manage funding activity and enable better analysis and planning for future grant making programmes.

Approach

Our starting point for the project (as with any other) was to meet with the senior management team to listen to how their existing processes worked, learn who was involved and understand the vision for the future.

The outcome was a document containing a set of high-level requirements which was used to shortlist suitable technology solutions that met the driving principles of ease of use, flexible, cost effective and meeting immediate requirements as well as having scope for growth.

The technology platform selected was Neetrix (a cloud-hosted CRM and business management system) as it met all the above requirements.

One of the key tenets of successful project management is that involvement of key users is vital – with that in mind a quick demonstration of the system was set up so that all staff could see and become familiar with the system capabilities, ask questions and add any suggestions/requests.

"I'm very grateful for all your work on Neetrix...it's made a massive difference to our delivery of grants and information storage. "
Ali Russell
Chief Executive

Case Study

Project Design and Build

A phased approach was agreed so that day to day operations were not impacted and to allow staff to gradually become accustomed to new ways of working.

- Phase 1 – Neetrix would be configured to enable the storage of Applicants, Referrers and Applications. Grant applications would continue to be taken through the existing online form and would be manually transcribed into the Neetrix system.
- Phase 2 – An integration between the online form system and Neetrix would be developed, allowing submitted applications (including documents) to be automatically uploaded directly into Neetrix.

It was quickly apparent that Phase 1 would impose on NBC staff a higher administration overhead than expected so the decision was made to fast-track Phase 2 and implement it immediately.

That was almost complete when the Covid-19 lockdown hit, and NBC saw the immediate need for a fund specifically for individuals impacted by it that would not fit in the profile of typical welfare applicants. We were able to react in an agile fashion, and designed and built a new application form, integration process and back-end data structures, and the new fund was up and running in 3 days. NBC now had 2 separate grant programmes running in parallel (Welfare fund and Covid-19 fund), each with a unique application form automatically uploading information into Neetrix, and funnelling into individual workflows tailored to each grant programme's eligibility criteria.

All through the project there were questions raised and process adjustments implemented, which built a great working relationship between NBC and the project team and allowed quick and decisive resolutions to maintain progress.

Some of the features that were set up and enabled real productivity gains were:

- Automatic upload of applications including mandatory supporting documents
- Pre-defined email templates allowing quick and easy personalised communication with applicants, including approval notifications, further information requests or rejections
- Workflows to take applications through the agreed stages and the flexibility to quickly adapt as the processes bedded in and different requirements emerged
- Different views of the status and workflows including work boards for viewing and managing applications in a graphical format
- An adaptable system which has now been used for 2 different grant programmes
- Notifications and tasks that enable communication and processes to be as automated as desired
- An Office 365 email add-in which enables inbound emails to be quickly attached to the correct application
- A solution that was easy enough to enable trustee members to have access and streamline the charity administration
- A system which includes not just grant management but also highly functional CRM and business management features.

Outcome

The project has been a great success for NBC as they now can process applications faster than they could before and have the flexibility to quickly react to changing circumstances. They also now have the ability to access the system from anywhere, enabling staff to continue processing grant applications during Covid-19 related lockdowns.

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