



It's our 30th birthday this year. We make around 85 grants each year with a grant making budget of circa £850,000. We work across multiple regions in the north and support work in the community, environment, education, health and arts & culture sectors.

Our bespoke grants management website was launched in October 2018. The original cost was £18,000. Annual hosting, security, backup and technical support is circa £1,300 / year. We have had no major expenditure on the website in the six years that we've been using it.

This represents an annualised cost of circa £4,300 / year over the six years.

We consider the grants management website to be one of the best investments we have made in the foundation.

www.shearsfoundation.org

Why did we make the decision to use a grant management system?

Around six and a half years ago we made the decision to move to a fully online system - having already moved from a paper based to a hybrid paper / email-based system over the preceding four years. We made the decision in order to:

- **Meet demand and increase capacity** – we had an increasing number of applications to deal with. In the last 6 years we have gone from around 30 applications a quarter to a peak of 77 a quarter recently.
- **Provide flexibility** – modern working, especially in a volunteer / part time role requires the ability to work from a variety of locations. Our old mix of paper-based and email systems did not facilitate this.
- **Be compatible with a limited staffing resource** - Doing grant making properly takes time and staff input and we needed a system to allow for the most important bits – the relationship building, getting to know charities, supporting them where possible – rather than endless admin.
- **Provide equity** – The ability to treat all applications consistently with the same level of diligence and commitment.
- **Increase professionalism** – Recognising that grant making should be done professionally (without losing the essential human element). We needed a system that made sure things didn't drop through the gaps and that we didn't let people down with poor communication, missed emails etc. We also wanted to speed up our processes.

- **Improve Integration & provide a single point of information / data.** Bring together a website that provided information; an application process; a trustee engagement process; manage grants and manage monitoring / feedback. Using multiple platforms and software solutions is both time consuming and gives more room for error.
- **Improve governance** – Involving trustees effectively in decision making, especially when the trustees live many miles apart and have busy lives – so face to face grants panel meetings aren't feasible.

What things were at the top of our list when we designed our grants management system?

There were three essential things that we wanted:

The front end (the applicant experience)
The governance end (the trustee experience)
The grants management end (the staff experience)

Which is why we opted for a bespoke system – we couldn't find any systems, off the shelf, that gave us all three things that we needed. We knew early on that we needed a bespoke system to give us:

1. The applicant experience.

We tried to build this around IVAR principles – we wanted to make the applicant's experience as painless and user friendly as possible by:

- Providing as much useful information as possible, for a potential applicant, on the website, helps us *communicate with purpose*.
- Providing a quick pre-application eligibility quiz so we *don't waste time*.
- Using a relatively short application form in which we only *ask relevant questions*.
- Having a user account / dashboard system – applicants have access to all previous applications, monitoring, signed terms and conditions etc. for reference.
- Re-applications are pre-populated with key info, again helping not waste time.

So far, it seems to have worked. From both our successful and unsuccessful applicants last year:

- 97% say our pre-application information is GOOD or VERY GOOD
- 97% say our process was open and straightforward
- 96% say that we communicated with purpose
- 93% of say that we didn't waste their time
- 91% say our application form is EASY or VERY EASY to complete

2. The Trustee Experience

An essential and unique part of our system is that trustees get to discuss and vote online for applications. At the end of the quarter, recommended applications get flagged on the website and trustees notified that there is a new application to consider. Trustees can choose to read an application summary or the full application / attachments; comment on a discussion board attached to each application and vote to accept, reject or abstain (where there may be a conflict of interest) on the application.

On their own dashboard, trustees can:

- View current and past applications and monitoring & learning forms.
- Play an active part in our democratic decision-making process, discussing and voting on applications.
- Read and comment on the uploaded 6 month follow up reports that we do for all grantees.
- Read and comment on uploaded visit reports.

3. The Staff Experience

Behind the scenes, in the back-office part of our grants management website, staff can control all aspects of the grants management process for applicants and trustees. The system uses a database of standard emails and time-based triggers to generate reminders to ensure we deal with all applicants consistently.

On their dashboard staff can:

- Prepare summaries and recommendations of applications for trustees to consider.
- Be automatically notified of any discussion around an application.
- Be automatically notified of the outcome of voting.
- Generate emails when applicants have been successful or unsuccessful.
- Be automatically notified when the terms and conditions for a grant have been accepted.
- Generate emails to tell the applicant that their grant has been paid.
- Be automatically notified when a six month follow up is due.
- Record the outcome of the follow up on the application.
- Be reminded of, and generate an email to the grant recipient when their monitoring and learning form is due.
- Be reminded of, and generate an email to trustees to notify that a new monitoring and learning form has been uploaded
- Generate an email to a previous recipient or unsuccessful applicant to let them know that they can reapply.
- 360 Giving data is automatically uploaded to 360 Giving each day without staff input.


What are we improving and what do we hope to improve?

As part of current update work on the website we are semi-automating the scoring system that staff undertake in order to arrive at a score out of 58 (based on 13 criteria). This score determines which applications go through to the trustees as recommendations. By automating this scoring process, we will save staff time and bring onto the grants management website a process which is currently done on a separate spreadsheet.

We want to Increase integration of our 360 Giving data to make it easier for potential applicants to see the sort of work we are funding, and this should help them judge their chance of success and their fit with our funding priorities.

We are reviewing our case studies and have made the decision to have some rolling case studies that show what we have supported in our most recent grants round. This, again, should make it easier for potential applicants to see the sort of work we are funding, and this should help them judge their chance of success and fit with our funding priorities.

Who designed our grants management website?



Design

Branding

Websites

Digital tools

☎ 01206 574147

✉ hello@creative.coop

🌐 creative.coop

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If anyone is interested in having a closer look at how the system works for us, I'd be more than happy to show you around.

Bruce Warnes
Trustee and Foundation Manager

The Shears Foundation