

Charity IT Consultancy Grants Management Solution



“We are really happy with the provider we have selected and looking forward to starting the implementation. Smartdesc have been great to work with and I have found them very responsive.”

Hannah Cilia

Head of Grants Team



the project

Background

The Jack Petchey Foundation was founded in 1999 by businessman, Sir Jack Petchey. Since the charity's founding, Jack Petchey has invested over £110 million in youth projects across London and Essex. The Foundation exists to raise the aspirations of young people, to help them take advantage of opportunities and play a full part in society.

Jack Petchey Foundation approached Smartdesc through our partners ACEVO. They required a charity IT specialist to run a market review to appoint a new vendor to deliver a new Grants Management solution. Smartdesc is the trusted IT Supplier for ACEVO and also a Premium Partner of the organisation.

Situation

Jack Petchey Foundation had an antiquated Grants Management System that was not really fit for purpose. The team were having to undertake a lot of manual data handling and there was no integration with any other IT system.

Jack Petchey Foundation needed guidance and consultancy to define the requirements and select the highest quality, best value vendor to implement the new Grants Management Solution and to integrate it with the IT function.

Solution

Smartdesc ran the selection project from the initial audit of requirements, through to a consolidated and prioritised list that covered functionality, technology and compliance. Because of Smartdesc's in-depth charity IT knowledge and industry experience, the Request for Proposal (RFP) was designed and produced in such a way that it elicited the best quality and value responses from potential suppliers. Dozens of potential candidates were consulted offline, and the selection process was overseen. This included;

- Vendor pre-submission qualification.
- Multiple rounds of clarifications to ensure proposals were accurate and relevant.
- Shortlisting of preferred vendors based on cost, quality and cultural fit.
- Vendor demonstrations and showcases.
- Contract review and input into the final migration plan for the appointed vendor.

Moving Forward

Jack Petchey Foundation were pleased to appoint a partner to migrate them away from the old grants management system and implement a new one based on the Salesforce platform. This means that, not only can the Grants function be delivered, but other departments such as Events are also now joining the project and moving their business processes onto it too.

The solution overall enables the charity to have an integrated and powerful platform, they can build on over time to run more of their operations in a central system. This removes the need for manual importing/exporting and manipulation of data, giving a single view on operations.

Benefits

- **Peace of mind and assurance with a scalable and reliable solution.**
- **Cost savings through integrated, powerful platform and digital strategy alignment.**
- **End to end Grants Management Solution from one centralised location.**
- **User friendly – enabling all stakeholders to collaborate in an effective way.**
- **Compliant data management.**

