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CUSTOMER SPOTLIGHT
The R E Ross Trust

THE R E ROSS TRUST

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—Margarita Sagris, Grants and Office Manager, R E Ross Trust

An online grants management system that places information right at your fingertips

The R E Ross Trust is a perpetual charitable trust established in Victoria in 1970 by the will of the late Roy Everard Ross. Since its inception, the Ross Trust has distributed over $105 million in grants for charitable purposes in Victoria.

Margarita Sagris is the Grants and Office Manager at Ross Trust and has been with the organisation since 2001. Although her role has changed and evolved over the years she has been administering all the grants for the organisation and overseeing what comes in and what is delegated to Ross Trust's two key program managers – who assess the applications monthly.

Some of the organisation's critical success factors include having the right systems and staff in place and according to Margarita, these two elements really go hand in hand.

The R E Ross Trust is powered by:

Blackbaud Grantmaking™

Ross Trust has been working closely with FINREA, one of Australia's leading IT services providers to implement Blackbaud Grantmaking and bring all its inhouse grants management and reporting online.

"We have been working closely with FINREA to bring everything online, but we are not quite there yet, we are progressing well and should be completed by the end of this financial year," said Margarita.

Other critical success factors for the organisation encompass having a clear mission and vision for the organisation and planning the way they work. When Margarita came on board a new filing system was implemented. The organisation has since become more focused on capturing electronic copies of documents and also hold one hard copy of the grant application which could be used by trustees or staff who are not using Blackbaud Grantmaking.

The challenges: Overcoming the manual and time-consuming processes

The organisation faced several key challenges which spurred along the review of its Grants Management system known as GIFTS Alta.

As part of the assessment, Ross Trust did not review other Grants Management solutions in the market as they were comfortable with Blackbaud Grantmaking.

With the Blackbaud Grantmaking solution, an opportunity presented itself to enable Ross Trust to move everything online. The key questions initially posed by the organisation were how they would move forward, and whether the timing was right.

At the forefront the drive is to accomplish the organisation's main goal - to streamline their internal processes and change the way they work.

"By implementing the grants management solution, it has enabled our organisation and people to change the way we work," said Margarita.

"It really changed it for the better."

"We are now working more efficiently and effectively and there is less room for error which is really pivotal in what we do," claimed Margarita.

Avoiding the laborious manual data entry error was also key for the Ross Trust. Prior to bringing on board Blackbaud Grantmaking when they were using the GIFTS Alta, they would be entering their data manually and this would always make them more prone to error.

Into the future, the sophisticated reporting and tracking capabilities of Blackbaud Grantmaking, will enable Margarita and the rest of the team to evaluate their efforts and quantify their results in a way that was not possible before moving to the solution.

"Through the use of Blackbaud Grantmaking there is less room for error as there are checks and balances all the way through for the grant seeker." — Margarita Sagris, R E Ross Trust

Empowering the Ross Trust team to improve the entire grants management application process

Prior to Blackbaud Grantmaking the grant seeker had to submit seven copies of the application to the Ross Trust which was a lot of manual hard work. Now all they do is go online and do it with much more ease. The speed of which the approvals occur is also critical and is one of the big things that stand out for grant seekers.

"Blackbaud Grantmaking has really helped us to improve our process, our applications and overall management of the grants process."

For instance, following a board meeting, approval is automatically sent out to the grant seeker and this can occur within 24 hours via email through Blackbaud Grantmaking– this enables the grant seeker to be made aware of the outcome of their application.

"Through the Blackbaud Grantmaking solution the approval process is now automated rather than manual. It used to take anywhere between three to five days to send out an approval email, now it takes as little as 24 hours, so the grant seeker knows where they stand and can have an immediate outcome to their application," said Margarita.

From an ROI perspective the solution has brought about operational efficiencies for the entire Ross Trust team.

"The efficiency gained, together with the improvement in the effective use of staff's time and hours has been significant."

Margarita says the organisation is now working with Justin Finighan of FINREA to get all the final reports finalised and online by their June 30 deadline.

Find out how Blackbaud Grantmaking can help you achieve your mission goals by delivering capabilities that allow you to streamline your workflows, improve collaboration, and measure your impact.

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