

Case Study

CARERS TRUST



Partnership approach key to success for Carers Trust.

In the face of increasing regulatory pressures, a challenging economic environment – and the associated pressures of raising funds, the need for the not-for-profit sector to measure and communicate its impact, it's easy to see why charities are re-evaluating their existing technology provision and, in some cases, taking steps to change their software solutions to facilitate a more streamlined method of working and greater efficiencies of data capture and management.

One such charity leading the way is Carers Trust. The charity – the largest carers charity in the UK - works to improve support, services and recognition for anyone living with the challenges of caring, **unpaid**, for a family member or friend who is ill, frail, disabled or has mental health or addiction problems. Carers can apply to Carers Trust for grants for funding to help them fulfil their caring duties.

The charity delivers services online and through a network of over 160 quality assured local service providers. Together, this vast network is united by a shared vision for carers – to make sure that quality assured information, advice and practical support are available to all carers across the UK.

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*Tim Cornish Head of IT
Carers Trust*

The Issue

As successful as this network is, it clearly presents a number of challenges, not least that the information and essential data is held across a number of disparate sources and not available from one central source. Tim Cornish, Carers Trust Head of IT, explains the decision to look at a CRM solution:

“We were looking at a way to centralise the management of our contacts through the business, with different teams managing different pieces of information, but using the same contacts. Sharing information was difficult previously, with numerous different spreadsheets and databases.”

The Solution

With bold ambitions but limited budgets, Carers Trust needed a cost-effective solution that was tailored for its own unique needs, but one that could be self-maintained with an element of training from CPS. The answer? A dynamic CRM that would enable Carers Trust to gather all its data into one central repository and make changes at the touch of a button.

CPS decided on a phased approach for the solution. The first phase was to develop a grants

management solution to manage the grants Carers Trust provides to carers. The plan was then for Carers Trust to use the development of this solution to springboard its own learning to be able to develop the system internally for other projects and teams.

“Previously, we had different spreadsheets, databases and hard copies of this information in multiple locations – without any joined-up resource,” explains Tim Cornish. “It was challenging because if a Network Partner had a new CEO or changed an address, our IT infrastructure was not cohesive enough for us to be able to make a simple change in one central location.

“However, being a small team, we realised that we couldn’t implement the changes across all the departments at the same time with the varying different degrees of information needed to keep up-to-date. So we decided to slice it up by department and function; budget was a significant issue. We started with a department that had a budget set aside for this activity – the Grants Team.”

So how does this work? The Grants Team provides grants to carers through the Network Partners. A carer will enter a Network Partner managed service and a support worker at the service will arrange to apply for a

grant for that carer, which could be anything from driving lessons, a new washing machine or holiday. The grants team then needs to manage the application process through a panel that determines whether that grant is approved or not and ultimately the payment to the carer through the Network Partner.

Carers Trust had previously been managing this process through an antiquated Access 97 database which was already working well beyond its capacity, so Carers Trust looked to CPS to develop a grant app within the CRM to enable Network Partners to manage the grant application, the fee and which grants had been won.

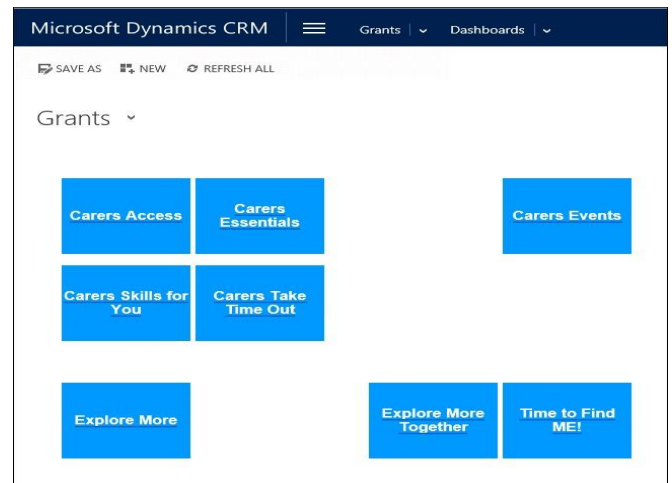
“One of the key things for the initial Grants Team work was to pass on knowledge about how to start developing in-house,” explains Tim. “CRM was a brand new product for us and we had no experience of it. It was important that CPS provided a key role in passing on this knowledge and were also in the background to help us answer any questions, as and when they should arise.”

Next Steps

The project took three weeks to implement and the Carers Trust grants team is already using the new CRM for any new grant application. In addition, Carers Trust is also looking at how the CRM can facilitate its network support team. This team is essentially an intermediary between Carers Trust and Network Partners (the local service providers), and works to manage that relationship. With the support of CPS, Tim and his team are looking at what their requirements are to record for Carers Trust Partners and what is required to manage the relationships with the frontline services.

To date, the partnership with CPS has proved extremely successful. “It was key for us to be able to continue the development of the CRM for different teams,” explains Tim. “That was a major factor in our choice of CPS and its willingness to work alongside us to deliver our objectives both in the short-term and medium-term. I was very impressed by the CPS team. It’s been a real partnership in terms of passing on knowledge, which is exactly what we wanted in the first place.”

The screenshot shows a web form titled "New Carers Skills for You". At the top, there are navigation options: SAVE, SAVE & CLOSE, NEW, EDIT PROCESS, and FORM EDITOR. Below this is a breadcrumb trail: Pre-Check (Active) > Application > Carers Skills for You > Close > Next Stage. The form has two main sections: "SupportWorker" and "Carer". Each section has a search bar and a table with columns for Full Name, Company Name, Email, Address, ZIP/Postal Code, and Date of Birth. Below the form, there are links for "Details of caring situation", "Details of the activity", "Benefits", and "Consent and declaration".





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