

Community Trusts Combining Together.

Eleven of the Community Trusts in New Zealand have combined together with a common goal of delivering better services to their respective communities throughout the country. The Trusts, which formed after the passing of the 1988 Trustee Banks Restructuring Act, are all similar in that funds received from the proceeds of the sale of shares in their then respective Trustee Savings Banks are invested in various asset classes and the income from these investment make up donations or grants that go out to support the communities (Not for Profit) they work with.

At the outset, the Community Trusts shared a common view that they needed to offer an online system to streamline their donation application processes and to make this process simpler for applicants to engage with the Trusts. There were also concerns about the risks arising from the disparate and individual database solutions that the Trusts were using. Syd Beguely, Chair of the Trust's Project Steering Group said, "The Trusts all felt that as our businesses were changing over time, our current systems were not capable of meeting our business requirements. We wanted to build on the benefits and the value add that could be obtained from a common solution across the eleven Trusts through gains in effectiveness and efficiency, and for our communities, making it easier for grant applicants with the option of applying for grants and donations on line".

The Combined Trusts went through a rigorous tender process which resulted in a fully integrated Sage Accpac, Sage CRM solution supported by Enabling being selected. "It was a very close call, but when we did the reference checking we knew that Enabling could deliver what we were looking for" said Syd of the decision to go with Enabling and Sage.

The decision was driven not only by the good support provided by Enabling but also by the fact that the Donation Management (Grants) System would be seamlessly integrated into the FMIS (Financial Management Information System). "These systems talked to each other, so we knew they would deliver what we wanted," said Syd of the Sage products. For the key Trust personnel, this meant they could get a 360 degree view of the various aspects of their granting businesses, providing better information that allowed the key stakeholders to make better informed decisions.

The Trusts have a good working relationship and regularly work on research, various projects and have an annual conference together. The vision for this project was not only driven from a cost perspective of combining resources but also because the Trusts individually felt they would be able to get a better system if they all worked together on the project.

Enabling's Canterbury Regional Manager, Tim Smith, was excited with the prospect of working with the Trusts. "It's a sizeable project and we like the challenge of working with the family of trusts to bring a single fully integrated Sage solution to them all. Each and every team member has added value to the process, with local community knowledge and strong product knowledge. Together we will deliver a solution that is intuitive and enables the Trusts to spend more time working with their clients in the community. This has to be a great step for all".

The Enabling team is a Sage Master Partner with over 120 professionals, PMP certified project managers, business analysts and product consultants spread throughout New Zealand and Australia. www.enabling.net