



## YEF seeks a level of automation to focus on delegate services

### OVERVIEW

#### CHALLENGES

- Data was not joined up making forecasting and reporting difficult
- High manual workload
- Inability to track interactions with contacts

#### OUTCOMES

- Achieved a level of automation which would allow users to efficiently manage multiple rounds of grants and evaluations
- Signed off MVP go-live in 6 months

#### KEY SERVICES

- Cost and options for technology
- Requirements Gathering
- Invitation to Tender document
- Technology Partner Selection
- Implementation project management services

**T**he Youth Endowment Fund (YEF) is an independent charitable trust established in March 2019 with a £200m endowment and ten-year mandate from the Home Office with the mission to learn what works to prevent children and young people becoming involved in violence and to build a movement to put this knowledge into practice. The Fund was born out of a partnership between 3 other organisations and was relying on their technology to facilitate its work. After its first two years, the partners worked together to transition YEF to a single team under the parent organisation Impetus. As part of their transition, YEF identified their biggest technology challenges as:

- Data was sitting in different locations and was not joined up which made forecasting and reporting difficult.
- There was a high manual workload to manage grant applications and ongoing grants which would increase with each additional grant round.
- There was an inability to track interactions with contacts, and many YEF team members were communicating with the same stakeholders without having a central place to log updates, preferences or notes.

### GATHERING REQUIRMENTS AND SELECTING THE RIGHT PARTNER

Hart Square worked with YEF to produce a business case and strategic roadmap to consider technology solutions available to them and recommendations of where to focus their investment. Hart Square went on to gather requirements and help YEF choose the best suited technology partner and then went on to project manage the implementation of their grant-making CRM solution.

### GOING LIVE WITH MVP

Hart Square began the implementation in November 2020, and worked with YEF to define their systems requirements as they were building their workflows and processes in parallel. Following a very collaborative and interactive



**“Our team was in a peak period of busy and Hart Square was there to keep the project on track and ensure someone was fully focused on getting us to our deadline as planned. I think we would be in a very different place now without Hart Square’s involvement!”**

**Andrea Ramsay**  
**Project Sponsor**  
**and Director of**  
**Operations**  
**YEF**

discovery, the system was then thoroughly tested by YEF staff and signed off for MVP (minimum viable product) go-live in April 2021, all in under 6 months!

Due to frequently changing requirements and competing priorities, some functionality was removed from the MVP scope and delivered a month later, allowing YEF to hit their original deadline and have the system in place in time for the launch of their upcoming grant round. During this time, the first course of user training was delivered, and we worked to identify areas for improvement ahead of the next go-live cycle in May.

Ahead of the project, YEF shared a concern that they did not want the system to be resource heavy to maintain and the users should not become data inputters. Thus, the system needed to provide maximum output and reporting value without its users having to complete additional tasks on top of their usual role. Whilst there was still work to be done in that area, following the go-live of the MVP functionality, users were already reporting that the system was intuitive and that their day job was being made easier by having all data in the same place and their workflows improved.

### **MEETING AN AMBITIOUS DEADLINE**

The biggest challenge that the project faced was having an ambitious go-live deadline which required a quick turnaround of information, when YEF had not yet established their processes or business rules. To meet the deadline, the

Senior Management Team reviewed and defined each process at speed, following a carefully orchestrated plan, which allowed the technology partner enough time to build and release by the hard deadline.

As a result of the transition to a single team and rapid growth of the Fund, YEF were working with ‘subject matter experts’ who were new to their roles. Despite both challenges, the team work and willingness of all to get to the finish line was remarkable, and the input of information was exactly as required.

The objective of the project was to achieve a level of automation which would allow users to efficiently manage multiple rounds of grants and evaluations, as well as saving time on processes that could be automated. This allowed YEF to focus their attention on improving their delegate service and increasing the volume of grants offered and managed, all whilst maintaining a level of flexibility in which standard processes could be manually overwritten.

Edward Cook, Project Lead and Head of Operations at YEF concludes “The Hart Square consultant has been very patient and supportive with us as we continually changed and adapted our expectations throughout the project. We have learnt a lot through the course of this project and Hart Square’s support, professionalism and enthusiasm has meant we have got to a product that works for us and is well set up to keep improving.” ■