# How to make a successful funding application for ‘AIMS’ – the Advice and Information Management System Database

Part 1: Information relating to the AIMS package and how to draft your funding application.

Part 2: The AIMS Funding Application.

## Part 1: Information relating to the AIMS package and how to draft your funding application

### **Introduction:**

This guide is designed to assist groups in making successful funding applications that will help them to implement the AIMS enquiry recording and case management software. Part 1 of the guide provides information on the software, training and support services you might want to include in your funding application. Part 2 of the guide is a template application for you to copy and then personalise so that it better meets your particular needs.

By using the information in this guide you will be able to design your own funding application, estimate your agencies support needs, identify and provide details of the benefits that will accrue to both your organisation, your service users and your funders, and explain this in your funding application.

The guide considers the “total cost of implementation” of the AIMS software, i.e. not just the purchase of the package itself, but all the elements of support, training and consultancy you might require to ensure AIMS is successfully incorporated into your organisation. Often it will be easier to attract the funding to cover this “total cost” in a single funding application, rather than struggling to find the money to pay for the training and support after you’ve bought AIMS.

Many grant providers and Local Government bodies have “mini” pots of money available for smaller one-off projects or sums of money that need to be used before the end of the financial year. Find out as much as you can about the amount of grant available and its main purpose.

Once you have identified a suitable funder, ensure your application meets their criteria and matches the amount of funds they have available. You might for instance want to consider increasing the number of training days you purchase or perhaps add an additional year of support to your application, to get it closer to the size of the funds available.

### The options described below would form an attractive, affordable and sustainable proposal for many small grant providers, so if you are unlucky the first time try again. Good Luck.

*If you have any questions or have some additional requirements please contact the AIMS support team on 020 7377 2806, and we will try to help.*

### **A description of the various components of the funding application**

This section describes the various components or services that will eventually make up your funding application. You can get more information on these various services by looking on our website at [www.rightsnet.org.uk/aims](http://www.rightsnet.org.uk/aims), and downloading the AIMS Demo.

Which Package?

### First decide which package is most suitable for your organisation. The AIMS database is available for two different platforms (Access and SQL). The figures in this guide refer to the AIMS Access version, see the website for further details.

### AIMS is also available in two levels of complexity: Core and Extra.

### If funding is available it may be better to start with the AIMS Extra package and switch off any unwanted features until required.

* The AIMS Core system provides the basic elements of a client case or enquiry recording database. The system can be configured to meet your organisations particular data capture requirements by the addition of new fields and the amending of classification schemes. The package comes with a function by function electronic Help Guide and installation instructions.
* AIMS Extra builds on the Core features by the addition of a number of case management tools, proving amongst other things, a Reception Room Booking Diary, the Key date organiser Action Manager feature, an on mass mail merge facility called the Merge Suite, and a Linked client family carer module.

AIMS annual licence to use and support contract

Each year you will need to renew your user licence, which also provides access to telephone support, email and web based information materials, and free upgrades to later versions of the database. If you need assistance with server installation, or other technical support problems then you should consider purchasing technical consultancy as part of the package from your local IT support provider.

The support contract varies in price (see our web site for the latest figures) depending on which AIMS package is being used in the agency. You should consider including additional future years of support within your current application. This would both help to maximise your funding application and minimise your expenditure in future years.

Training Requirements

You will need to assess how many courses and how many trainees you should include in the funding application. The training is suitable for both AIMS Core and AIMS Extra package users unless otherwise stated.

AIMS users have access to a number of different training courses, these include; Introductory level, Report Writing and bespoke courses covering advanced features and functions. Training is normally delivered to only 6 delegates per course to provide sufficient time for questions and one to one support.

Before specifying the In House training option you will need to contact the AIMS team to discuss the suitability of the training venue, the number of delegates, start times etc. Please also remember to include any additional travel, accommodation and subsistence costs when calculating In House training services.

AIMS Introductory level

Training covers the basics of data entry, searching, adding clients, subjects, work and outcomes.

Where possible it may be beneficial to have more than one person from your group attending the introductory level training, some groups like all members of staff to have access to the training. This helps them both support each other in their learning, as well as safe guard against the loss of knowledge if one worker leaves the organisation.

In your funding application consider applying for several places which you can hold as credits with the AIMS Team and then use to place new workers on the introductory level course at some point in the future.

No previous experience of using a computer is assumed.

Report Writing course.

This course will help you both better understand how to work the pre-loaded reports, as well as design additional reports that can be used to provide key management data, help monitor equal opportunity provision and report to various funders or management committees.

The course covers the key concepts in report data collection, designing report layouts, and applying various report conditions.

This course requires good knowledge of how AIMS has been configured and the data collection practices within your organisation to ensure maximum benefit. One or two people from your organisation would benefit from attending the course, as this would help them support each other and implement their learning once back in the office.

Consultancy service

The consultancy services on offer are described in more detail below. The number of days, type of consultancy required, travel time and whether the consultancy can be combined with other activities, e.g. follow on from a training day, will all affect the total number of days required. You will also need to include any additional travel, accommodation and subsistence costs when calculating consultancy services.

*Before specifying the number and type of consultancy days service required in your funding application please discuss your needs with the AIMS team.*

Configuration and Usage Consultancy:

Consultancy is available where groups wish to explore their particular data capture design requirements and want assistance in configuring AIMS to best match their style and type of service provision. An in-house half day Intro level training for staff followed by a half day configuration and design session is a popular consultancy choice. Groups should discuss their requirements directly with the AIMS team and utilise consultancy support to help tailor the system.

Example Spreadsheet illustrating the inclusion of various services included in the total cost of implementation

The spreadsheet below is an example of how an agency might have selected different services to comprise their total funding application. In this example the agency has requested:

1 AIMS Extra (Access version) package

2 year’s Licence to Use (which includes support)

4 places on the Introductory level training course

2 places on the Report Writing training course

1 day’s In-house consultancy

Travel and accommodation costs associated with the consultancy

NB. The spreadsheet will automatically calculate the sub-total and add the VAT. You would need to apply for the total cost, in this example just over £4000.

Example Spreadsheet illustrating the inclusion of various services included in the total cost of implementation:



## Part 2: draft Funding Application FOR AIMS

You now need to enter your own requirements in the spreadsheet which can be found at the end of this document. Then complete the draft application below by personalising the information and then send your proposal to the funding bodies you have identified.

Covering letter to accompany the application:

Dear *{Insert Funder Name}*

Please find enclosed our application for funding under the *{Name of grant / funding stream}* which we believe is a very suitable match for our proposed bid. The application details the significant benefits that could be attained, as well as outlining our proposals for successfully implementing the system should our application be successful.

We believe that the work of *{Insert Your Organisation Name}* would be considerably enhanced by the introduction of a computer based enquiry recording system, and that this application will complement our existing funding and service provision making it more effective and of greater value.

Yours sincerely

# A funding application for the AIMS enquiry recording & case management system.

{Amend the wording and contents of this application so it matches the services you have included in your funding bid, e.g. do not mention consultancy unless you have applied for consultancy}

Summary of the main proposal:

AIMS is a specialised enquiry recording and case management system designed and supported by rightsnet for groups providing advice and information services. With the growing demands for accountability and quality assurance from both funders and service users, it is essential that our organisation has in place a system that enables us to deliver more effective, efficient and responsive services. The AIMS database system provides us with the ability to do this.

Our funding proposal covers the total cost of implementation and ownership of the database, including software familiarisation and staff training, assistance with initial set-up, consultancy support and on-going telephone support and system updates.

The Main Benefits of AIMS:

AIMS has been designed for use by advice and information service providers, can be configured to **meet our particular local reporting and recording requirements** and meets the Quality Mark criteria as set out by the Advice Services Alliance.

The database will enable us to be more **effective** in our service delivery. For instance, we would be able to use the information collected on the database to identify trends amongst our users and to target information more closely to their needs. When legislation changes or new services become available in the area we could communicate directly with those likely to be most effected, ensuring improved take up of the service or benefit.

AIMS could help us make more **efficient** use of our time by assisting us in the active management of the case, automating certain procedures, reminding us of deadlines or key dates and ensuring that all staff and volunteers were able to access the client records, thus saving time and progressing cases faster.

The data once collected will enable us to be far more **responsive** to information requests from our major funders, Management Committee and service users. The problems and issues raised by local people will help inform the direction of local services and will be useful as a **social policy indicator**. In addition we will be able to provide our Management Committee with evidence relating to the **quality and quantity of service provision**. The data will enable us to map our service provision and help us meet our **equal opportunity policy** ambitions, as well as identifying any gaps in provision.

Key issues when implementing a case recording system:

Rightsnet’s experience of helping groups set up and implement a client recording system suggests that the following points need to be addressed to maximise the likelihood of success. The “Total Cost of Implementation” includes all the additional time and services required over and above the simple purchase of the database itself;

Groups should be

* committed to the introduction of a database recording system to monitor and record their work
* have a clear and realistic timetable for implementation
* be confident that the system can be (or has been) configured to meet their particular working practices
* provided with sufficient support and training in how to use AIMS
* able to call on further support in the use and development of the database over time

We have considered each of these points and having looked at the demonstration version of the AIMS database, have put together a mix of consultancy, training, and technical support that will ensure the successful implementation of the package. We have identified the total cost of implementation (including access to technical support, consultancy and user training) and ownership (including ongoing telephone support and follow up training) which we have detailed below.

We are seeking a grant to cover the cost of implementing the AIMS software successfully, which will be £ *{Insert the Total figure from the spreadsheet here}*

Include a summary of the various services you have applied for or a print out of the spreadsheet.

AIMS Software £

Support £

Training £

Consultancy £

VAT £

Total £

### **A pick and mix spread sheet to design your own application with associated costs**

Double click on the spreadsheet to open and amend the “Number” column to match your needs.

