

## The Woodland Trust

### Case Study



## Becoming Paperless and Planting Trees

**UK woodland conservation charity implemented DocuWare to secure legal documents in an electronic format that was “legally admissible” by the courts and to improve long-term record storage. After implementing DocuWare, better records management improved the charity’s income by allowing the organization to take full advantage of tax credits on donations. Additionally, DocuWare was tightly integrated with their CRM solution to create one system for information and documentation which improved customer service.**

Established in 1972, the Woodland Trust is the UK’s largest woodland conservation charity and one of the leading conservation forces for woods and trees. The organization campaigns to protect ancient woods, restores woods that are damaged, and fights for those threatened by development. With the help of communities, schools, organizations and individuals, they create new native woodland throughout England, Wales, Northern Ireland and Scotland.

### The Woodland Trust

**Industry:** Nonprofit

**Location:** United Kingdom

**Application:** Donor Management, Legal Documentation, Estate Records

**Document Types:** Deeds, Legal Documents, Gift Aide Declarations, Direct Debit Records, Risk Assessments, Budget Reports

# Requirements

An upcoming move to a new, more modern building where they anticipated having less storage space prompted the organization to start evaluating document management solutions. The charity wanted to digitize their legal documents in a format legally accepted by the courts and to securely store these documents with long or indefinite retention periods. They also needed a solution that could integrate with other key systems such as their CRM and accounting systems, as well as provide home-based employees with easy access to important information.

With almost 2/3 of their employees working from home, access to information over the internet from a tablet, smartphone or laptop was an important consideration.

## The Tasks

- Reduce storage space
- Create a “legally admissible” electronic document archive
- Share information with home-based employees
- Integration a document management system with the organizations CRM and Accounting system

# Solution

Woodland Trust met with their Authorized DocuWare Partner and decided to implement DocuWare because it met the legal requirements of the courts, would help them reduce document storage space, and could be customized to their unique needs.

As an organization dedicated to woodland conservation, moving toward a paperless office was the logical next step. DocuWare was initially rolled out to the legal department to manage and store land acquisition documents and legacy documents containing the details of an individual's donation of part of their estate to the Woodland Trust after their death.

Easy searchable access to information inspired the charity to expand DocuWare's use to include: direct debit mandates - the document confirming a donation made with monthly electronic debit, and gift aid declarations - a document that allows an individual to declare that they are a UK taxpayer and donate the income tax previously paid on the donation to charity. This form allows the charity to collect an additional 25% of the value of the gift from the tax office as additional revenue. A donation of £100 would result in an additional £25 of income for the charity from the tax office.



# Benefits

UK law allows gift aid declarations to be made verbally but the charity must confirm the declaration in writing and keep a copy of the confirmation. DocuWare helps the organization manage and maintain these forms that are an important source of income. If audited the Woodland Trust could be liable for missing gift aid declarations, but with DocuWare in place this liability is eliminated.

“DocuWare helps us securely store gift aid declarations and claim tax credits. The increase in income from tax credits alone has more than paid for the software,” said Richard Gardner, IT Systems Analyst for the Woodland Trust.

## Applied Modules

- Active Import
- Content Folder

Using custom in-house software programming, DocuWare was integrated with the charity's CRM system, Advanced, NG. Once a donor is located in the CRM system, every document related to that donor can be accessed by clicking the integrated DocuWare button which works in the background to automatically search and display any document indexed with a donor's reference number. This integration has streamlined two databases into one system, simplifying information access and improving customer service, as well as the management of login credentials.

"By using DocuWare's integration tool we have managed to incorporate enterprise grade, reliable document management functionality into our CRM software to make one system for information," said Gardner. "This integration allows more staff to have access to supporter's documents very quickly without having to train them to use a new system. The integration is so seamless and easy that most of our staff don't even realize they are using DocuWare."

The Woodland Trust was able to add new work processes for home-based employees that allow them to access and store documentation anytime, instead of requiring them to travel to the office to submit documentation.

In the legal department, DocuWare meets the guidelines set by UK law and the electronic documents are legally admissible in court proceedings. Search times are considerably shortened which frees up the legal team for more important tasks. Their DocuWare solution also guarantees secure access to documents legally requiring long or permanent retention schedules, such as property deeds or wills. The legal department actually went back and scanned all of their files in order to provide digital access to any legal document.

DocuWare also plays a key part in the Charity's estate management. Today risk assessments, budget reports and other documents relating to site management are securely stored in DocuWare and available to the entire staff regardless of location.

## The Benefits

- Created a digital archive of "legally admissible" documents
- Improved customer service by integrating DocuWare and the CRM, creating a single system for all information
- Increased income through better management of gift aid declarations
- Enhanced work processes for home-based employees



## Conclusion

In conclusion Gardner said, "One of our original purposes in implementing DocuWare was to make our move to a new building easier and move toward a paperless office. That was accomplished, but the real benefit we've seen is DocuWare's flexibility which allows each of our departments to use the software in very different ways expanding charitable income and helping us reach out goals."



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*Richard Gardner, IT Systems Analyst, The Woodland Trust*



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