

Isosceles helped John Ellerman continue to make a difference to people's lives

The quality of the Isosceles team and their back office systems, was a major factor in John Ellerman's decision to choose Isosceles to deliver an interim outsourced accounting service.



John Ellerman, based in Central London, is an independent grantmaking foundation – supporting charities that make a practical difference to people, society and the natural world. A responsive funder, they listen to what applicant's judge is important.

The requirement

John Ellerman's Finance Manager was due to go on extended leave. Rather than recruit a temporary employee, the Trustees decided to outsource the financial and investment management. They were looking for an organisation or individual with the following characteristics:

- The skills and ability to undertake the financial and investment management and administration
- Highly organised, able to prioritise and plan ahead to meet deadlines
- Able to meet their demands with flexible onsite and offsite time

- Confident and competent in using Sage
- Experience of charity accounting

Why Isosceles?

John Ellerman chose Isosceles because they had the experience, skills and qualities they were looking for, and had some experience of working with charities and not for profit organisations.

They were also good value for money compared with others. They were also willing to reach agreement in principle and ensure an individual was in place when the Foundation needed it.

Isosceles' Interim Role

- Manage and administer the Foundation's finances, accounts and investments to meet the aims and objectives of the Foundation
- Contribute to the future strategic direction of the Foundation as required by the Director
- Manage all bookkeeping, investment records and administration

"We found Isosceles to be flexible and responsive at all stages of the process, and would recommend them to others. The individual accountant we worked with on a day to day basis was highly professional, pleasant and customer-focused. She built a good rapport with staff and trustees, and managed to fill an important and significant gap in a very effective way." Commented Nicola Pollock Director, John Ellerman

The Results

During their time at the Foundation, Isosceles provided the services required in an efficient and timely manner. They also helped improve efficiencies in the organisation by automating processes, in particular:

- Developing an efficient process for reconciling Sage, Excel and the grants

database for the implementation of a significant change to the accounting policy for grant liabilities.

- Importing journals into Sage rather than manual posting –reducing the time spent by staff
- Training the Finance Assistant to take on more advanced responsibilities, to enable the Finance Manager to spend additional time adding value to the organisation.

Isosceles were able to hand back to the Finance Manager returning from leave seamlessly and effectively.

