



THE CHICAGO COMMUNITY TRUST
AND AFFILIATES

Improving the user experience for everyone at The Chicago Community Trust.



Synopsis

The Chicago Community Trust was using a grants management system, but it wasn't meeting their needs. The online function was only able to accept applications, and they needed a system that had more in-depth functionality. It wasn't an efficient or intuitive system for applicants, as forms couldn't be broken out to make them easier to complete. When the Trust made the decision to move to SmartSimple, all their needs were met, and more. Every piece of information became saved and searchable, all the data they need for reporting easily accessible, and they've eliminated the need to print applications for their reviewers.



Key Stats

Client Name: The Chicago Community Trust

SmartSimple Client Since: 2014

Type of Giving: Grants

Dollars Managed: \$230 million in 2016

Old System: Other online system

Key Pain Points: Repeat applicants had to re-enter their organizational information every time they applied, no workflow capabilities, no reviewer portal, not very user-friendly.

New System Must-Haves: Ability for grantees to do all their work in one system, a reviewer portal, eliminating the need for printing, ability to make changes without needing to engage the vendor.



The system saves our grants management staff a lot of time. We don't need to print documents including applications, grant record forms, and award letters as we did with our previous system. We're able to easily communicate with everyone involved in our granting process and track all our activities in one central location. SmartSimple has definitely improved efficiency. ”

Sandy Phelps
Director of Grants Management,
The Chicago Community Trust

About The Chicago Community Trust

The Chicago Community Trust is a community foundation dedicated to improving the Chicago region through strategic grantmaking, civic engagement, and inspired philanthropic initiatives. They serve nonprofit organizations working to make a difference, bringing to life their bold vision of creating lasting community change. The Trust brings together local businesses, governments, and organizations to solve pressing challenges. By connecting thoughtful donors with smart solutions, they leverage collective knowledge, creativity, and resources to make a strong, positive impact on the lives of everyone in the region.

A solution that fell short

The team at The Chicago Community Trust was already using an online grants management system, but it was far from being a complete solution. “The online application function was alright, but we needed a system that did more than just accept applications,” says Sandy Phelps, Director of Grants Management at The Chicago Community Trust. **“Ultimately, what we wanted was a better experience for everyone in our granting community;** not just grant applicants, but reviewers, and our internal grants administration team as well.”

The Trust wanted the entire granting process to move more quickly and smoothly, with every step of the process – including revisions, requests and reporting – contained in one place so they didn’t need to use multiple systems to complete their work. “We were looking for a software solution that would centralize our process but also be easy to use. For example, we thought it would be great to have a system where applicants didn’t need to re-enter their information every time they applied for a new grant. Our old system involved a lot of scrolling through pages and pages of text. We wanted a system that sorted information in a much more concise manner.”

The Trust brought a consultant on board to help select their new vendor. “I strongly suggest using a consultant when choosing a system,” continues Sandy. “She first helped us define our requirements and grant process improvements as part of the selection process. A short list of vendors we wanted to consider was created, and she made sure that the right questions were asked during their system demos.”

A unique solution for a unique organization

The Trust ultimately chose SmartSimple for a variety of reasons. “Community foundations have very specific needs. Our granting process is extremely complex, due to a combination of work done by the core business, funding priorities, initiatives, and the range of geographic affiliates. Each area has such different requirements that present their own challenges. With SmartSimple, each fund and initiative is able to work in the way that’s best for them with the processes in place to administer their particular functions.”

Sandy points to the great people on her implementation team as the key to the project’s overall success. “Having a dedicated team and regular meetings to review and accurately track our progress was great. The personal contact provided an open dialogue so we knew what was coming up and could immediately address any issues or concerns. Our SmartSimple implementation team made sure everything happened on schedule, and came up with truly viable solutions for every aspect of our process.”

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The Chicago Community Trust
is hosted on
Amazon Web Services

The advantage of Premium Support Services

The Trust added Premium Support Services to their service package. “We’re thrilled with the additional features offered with Premium Support Services. The best part is having our very own Dedicated Support Representative (DSR), who has intimate knowledge of every aspect of our grants management system.”

“With a single phone call, any member of my team can reach out to our DSR and receive exclusive assistance with absolutely anything related to our SmartSimple system. Our DSR is uniquely qualified to help us make changes, solve problems, and give us a hand adding or amending features and functionality. It’s a real benefit when we have any issues or run into a problem. We simply reach out to the person who knows everything about us and our configuration. Our questions are answered quickly and efficiently, giving us more time to do our work and help our communities rather than tinkering with software.”

A holistic solution for the entire community

Thanks to SmartSimple, everything now runs more smoothly at the Trust. “The system saves our grants management staff a lot of time. We don’t need to print applications, grant record forms, and award letters as we did with our previous system. We’re able to easily communicate with everyone involved in our granting process and track all our activities in one central location. SmartSimple has definitely improved efficiency.”

“I would absolutely recommend SmartSimple to anyone looking for a grants management system that makes life easier for every grantor, grantee, and reviewer. Our experience was extremely positive; it’s a great company with great people. The system meets our needs and the support we receive is excellent. Everyone is wonderful to work with and the platform is intuitive and easy to navigate.”



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About SmartSimple

SmartSimple is a global leader in cloud-based automation software, offering unique process solutions used by over 300 clients in nearly 200 countries. Some of the largest companies in the Fortune 100, as well as global foundations and government agencies, choose SmartSimple to enrich their impact story and create greater efficiencies in their granting processes.

About GMS360°

SmartSimple GMS360° is a robust, end-to-end grants management solution that makes it easy for foundations to track, manage and report across multiple grants programs, giving true insight into the impact of your funding efforts. In a single online solution, GMS360° gives you complete control and visibility over the entire granting process. From the initial call for proposals to reporting on final outcomes, GMS360° helps foundations stay on top of everything from correspondence with applicants, to monitoring budgets and reporting, eliminating hours of paper shuffling and administration. No two foundations are alike. That's why the technology behind GMS360° comes with the flexibility to fit your unique needs and deliver innovative solutions that transform how you manage your granting programs.

Our commitment to making processes work better and freeing our clients to do more good goes beyond the technologies we create
– it's at the very heart of our business.

Michael Reid
Co-Founder, Chief Operating Officer
SmartSimple



Discover more.

Contact us to request a demo that's tailored to your granting needs.

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SmartSimple interacts with over **115,000** unique users a month from over **300** organizations in nearly **200** countries.

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