

**Ravina Sangha**  
Technical Account Advisor,  
SmartSimple Software

# Client Success Stories

Generally, people invent things due to dissatisfaction. SmartSimple Cloud is no different.

When we started the company Keith and I were deeply dissatisfied with the way that the software industry was heading, people in the industry seem to have forgotten that software is about empowerment. Rather, they saw software as a way of extracting the maximum amount of money from an organization with the minimum empowerment that they could get away with.

That's just not how we think. Our vision has always been to fully empower our clients and, as importantly, assist our clients empower their communities.

Fast forward to today, the stories in this book are testaments to our efforts to achieve that goal. Every one of these 50+ stories, 50+ clients, regardless of the sector, is about our efforts to empower clients to empower their communities. None of these stories are technical as technology is nothing more a means to an end, it's the empowerment that's the real story. Hopefully you will find these stories useful in understanding what we could do to empower your organization.



**Michael Reid**  
Co-Founder and  
Chief Operating Officer



**Keith Yau**  
Co-Founder and  
Chief Technical Officer





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## California Arts Council



**How SmartSimple's Platform enabled the California Arts Council to grow and scale beyond boundaries.**

### At a Glance

The California Arts Council had just six months to move to a new grants management system before their previous provider deprecated its software. Despite the time crunch, SmartSimple delivered a system that not only accommodated the state agency's complex granting processes, but also empowered their staff with the ability to evolve it as their grantmaking needs grew.

"Whenever I need support, it's there. The one-on-one attention to the clients is truly an admirable quality of SmartSimple. We felt listened to."

**Kala Kowtha**  
IT Specialist

**SmartSimple client since:** 2017

**Type of giving:** Grants

**Dollars granted:** \$24,451,331

**SmartSimple product/services:**

- SmartSimple Cloud for Grants Management

### Key pain points:

- Inflexible software that couldn't manage entire lifecycle
- Manual administrative process
- Disparate and disjointed data collection process

### New system must-haves:

- A new, flexible system to scale the program
- Intuitive software that was easy to adopt by staff
- A configurable system to accommodate the different classifications and user roles



California Arts Council is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About California Arts Council

The California Arts Council is a state agency based in Sacramento whose mission is to advance the state of California through the arts and creativity. Its 11 members are appointed by the Governor and the State Legislature, and bring diverse experience from the arts and creative sectors, arts education, community development, state and local governments, and nonprofit and for-profit sectors of California's economy."

The California Arts Council encourages public participation in the arts within the state, helps build arts organizations at the local level, assists with the professional development of arts leaders, promotes awareness of the value of the arts, and directly funds arts programs for Californians.

### Big changes in little time

The California Arts Council tried to make the most of their previous grants management system (GMS), but it had its limitations with respect to what more they could do. While their former system facilitated incoming applications, it didn't provide features to manage their entire grantmaking lifecycle. This meant that administrative staff was dealing with a disjointed and manual process for contracting, accounting, and payments that involved having to compile data from other systems.

The worst news came when their previous software provider sent them an email announcing that they were phasing out the solution, leaving the arts council with just six months to find a new GMS. "We didn't know what to do in that short amount of time," says Kala Kowtha, IT Specialist for the California Arts Council, who at the time had recently joined the team. To make matters worse, their previous software provider offered minimal support during this time and extracting all their grantmaking data became the arts council's responsibility.





At the time, the California Arts Council was managing 12 programs with a total of around 1,700 organizations registered in their system, as well as receiving 1,500 submitted applications and funding an average of 1,000 California organizations annually. Switching to yet another system that didn't accommodate their entire granting life cycle was out of the question.

### The search for a new, more flexible grants management system

Over the course of their search, the California Arts Council reviewed seven different solutions and decided on SmartSimple Cloud. "We liked the flexibility offered and felt like we were best able to scale our programs with SmartSimple's platform," says Kala. With a more flexible grants management system, they could better tailor their own system to their requirements now and into the future.

Even though they were able to export all their historical data from their previous system, the Council saw this as an opportunity to rebuild their GMS from scratch and didn't import their data into SmartSimple Cloud. This was done deliberately due to the rapid implementation timeframe and the preference of not wanting to compromise the integrity of their new system with incomplete data. From this experience, Kala learned exactly what she needed from their system, saying "when you're thrown into the pond, you learn how to swim."

### A grants management system designed to grow with

During the implementation of SmartSimple Cloud for Grants Management, the Council was in a time crunch. There were a lot of programs and branches to build out. Over the course of their GMS selection, additional grant programs needed to be taken online. Nevertheless, SmartSimple's Implementation team got them up and running without skipping a beat or compromising the user experience for applicants. "Overall, SmartSimple's Implementation team worked very well with us," says Kala.

Working with their new SmartSimple Cloud, Kala and the rest of the administrative staff are no longer limited within the confines of their former, now-sunsetted software. "We're now able to add even more organizations into our system," says Kala. Along with the ability to scale with their needs, they now have a GMS that's tailored to the exact needs of their

**"We liked the flexibility offered and felt like we were best able to scale our programs with SmartSimple's platform."**

**Kala Kowtha**  
IT Specialist

grantmaking programs thanks to the flexibility afforded by SmartSimple's user classification features. "We're able to assign roles and attributes to different users throughout the grant lifecycle, so they only see the data they need to see," says Kala.

Kala was able to take full control of their SmartSimple Cloud and started making configuration changes on her own. "There's a high comfort level with our system and what it has to offer," says Kala. With the intuitive settings offered in SmartSimple, she was able to configure a new grant application cycle entirely, making for a much more efficient administrative process. "Whenever I needed support, it's there. The one-on-one attention to the clients is truly an admirable quality of SmartSimple. We felt listened to," says Kala.

### Evolving into the future

The California Arts Council is currently developing a second system with SmartSimple that will serve as a content management system (CMS) to power its Arts in Corrections program. In partnership with the California Department of Corrections, the program improves access to the arts for incarcerated individuals, so that when they're released, they're able to cope in a healthier way. Despite being a different solution, it's still powered by the same SmartSimple platform.

With their new CMS, the California Arts Council will be able to run ad-hoc data reports to their federal funders. And as they're expanding their arts programs, SmartSimple Cloud is keeping pace alongside them. "There are quite a few enhancements that are nice to have and we discover them every day. It's the nature of the system and it's constantly evolving," says Kala. ●



## City of Phoenix Office of Arts & Culture



**How the City of Phoenix Office of Arts & Culture gained greater efficiency, agility and resiliency with SmartSimple.**

### At a Glance

The City of Phoenix's Arts & Culture Department was faced with a basic, point software solution that could no longer handle their growing grantmaking needs. In fact, their old solution shut down during one of their application deadlines, causing undue stress for both their staff and applicants. Making the switch to SmartSimple Cloud for Grants Management provided a much more seamless solution to efficiently review applications, effectively disburse emergency funding, and simplify the application submission process that lessened anxiety for applicants. The decision to switch to SmartSimple Cloud couldn't have been more timely to handle rapid response grantmaking during the COVID-19 pandemic, which they were well-equipped for.

**SmartSimple client since:** 2019

**Type of giving:** Grants and programs to strengthen diversity and inclusion in the arts and culture sector for all Phoenix residents.

**Dollars granted:** \$1 million annually

**Old system:** Basic portal without reporting capabilities

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

**Key pain points:** An inefficient grantmaking process without reporting capabilities.

**New system must-haves:** A flexible, future-proof system that centralizes all data, has robust reporting capabilities, handles payment processes, and is easy to use for reviewers, staff and applicants.



"SmartSimple stepped in at no charge to help strategize how to roll out the money quickly. We disbursed the funds so fast that the process we've built together set a standard for other departments."

**Sarah Leon**

Community Investments and Engagement Director



City of Phoenix Office of Arts & Culture is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About the City of Phoenix Office of Arts & Culture

The City of Phoenix Office of Arts & Culture supports a community that makes up the fifth largest city in the US. The arts funder works toward a mission to provide fair treatment, access, and opportunity for all individuals in the arts.

Their equity strategy aims to identify and eliminate barriers that have prevented the full participation of marginalized groups from the Office of Arts and Culture programs and to strengthen diversity, and inclusion in the arts and culture sector for all Phoenix residents.

### A grantmaking process on the verge of collapse

The City of Phoenix Office of Arts & Culture wasn't working with a software platform that could address the growing needs of their large and diverse groups of applicants and staff. "We worked with just an online portal that wasn't great at keeping records," says Sarah Leon, Community Investments and Engagement Director for the City of Phoenix Office of Arts & Culture.

"Some of our tools were a little outdated and weren't serving the community very well. Maybe fifteen years ago it did, but we weren't efficient. It's a big goal for us to be efficient," continues Leon.

Things went from bad to worse when their portal shut down on the application deadline date. "That was really



challenging and we quickly needed something more dependable that wouldn't confuse people," says Leon. Things started to shift once they started working with SmartSimple Cloud. "Our leadership team supported the idea of getting a more robust solution for managing our grantmaking, and we were able to do it on a very tight turnaround," continues Leon.

### Rising to the challenge and setting a standard

COVID-19 has changed how many sectors approach their work, including the grantmaking landscape. Having a resilient system to disburse emergency funding to communities in need was a priority. "We got \$2.6 million from the Federal government to help with arts and culture with a fast turnaround because the city needed to use the funds quickly," says Leon.

The City of Phoenix Office of Arts & Culture not only met this challenge, but also grew their grants program with funding opportunities all while introducing SmartSimple Cloud for Grants Management. "We just had a newly-built system and we were still in the process of learning how to use it. However, SmartSimple stepped in at no charge to help strategize how to roll out the money quickly. We disbursed the funds so fast that the process we've built together set a standard for other departments."

### Easing applicant stress during an anxious time

Even during COVID-19, the City of Phoenix Office of Arts & Culture found greater confidence with their streamlined grantmaking process to support their community. "People have a lot of anxiety, especially in the art world, so it was nice to bring something that didn't bring more uncertainty," says Leon.



**"Learning new systems can be quite daunting, but in this situation, once I figured out how it works, I learned to build things pretty fast"**

**Sarah Leon**

Community Investments and Engagement Director

Sarah and their team found SmartSimple Cloud's Meeting Module for panel reviews to be simple and very helpful. "We didn't have a tool like that before. We had to email everyone before, and now we have something much more centralized. Even now in a remote state, we're able to review easily," says Leon. In a time when things come with so many questions, the stability of their new system didn't add to the list. "Learning new systems can be quite daunting, but in this situation, once I figured out how it works, I learned to build things pretty fast," continues Leon.

Another aspect that elevated their grantmaking to the arts and culture sector was parsing out the data that is only relevant to particular staff roles. "I really like the Submission Manager and Filtered Views, I get to select the granting information I need and be able to download it," says Anel E. Arriola, Community Investments and Engagement Manager for the City of Phoenix Office of Arts & Culture. "From being able to assign different roles to different staff to having different reviewers evaluate specific grants has been an easy process, especially in this time when we are all required to work remotely," continues Arriola.

### More room for imagination

Now with a more efficient grantmaking process and being able to address the granting needs of their community, the City of Phoenix Office of Arts & Culture has a strong foundation and their eyes on the future. "Because everything has moved so fast, we suspect there's a lot of abilities that SmartSimple Cloud has that we don't know exist, so we're excited to explore," says Leon. "We love having the room to imagine and explore what more we can do with our new system and we're excited to surprise our community," adds Arriola. ●

## Ohio Arts Council



**Moving the Ohio Arts Council to a sustainable, future-ready grants management solution.**

### At a Glance

The Ohio Arts Council decided to get a custom-built system to manage the up to 2,000 awards they handle at a time. After 10 years, however, the system was dated and they needed a platform that was flexible, and able to change as arts granting processes and practices did. SmartSimple Cloud provided complete configurability, a high level of transparency, and the powerful security they needed to meet their complex reporting needs and protection for the proprietary information that flows through their system.

**SmartSimple client since:** 2014

**Type of giving:** Grants

**Dollars granted:** \$13 million since 2015

**Old system:** Custom

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- An outdated system
- Old system requires an extensive overhaul that was going to be very expensive to upgrade

### New system must-haves:

- Complete operational transparency
- Robust reporting capabilities
- A high level of security
- Ease of use for staff and applicants

"As a grants management system that could grow with us, SmartSimple Cloud for Grants Management struck the perfect balance between being easy to use and still being nuanced enough to handle how we do things... SmartSimple Cloud allows us to be nimble and won't ever hold us back from executing big ideas or initiatives."

**Dan Katona**

Deputy Director



Ohio Arts Council is a SmartSimple Cloud user

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### About the Ohio Arts Council

The Ohio Arts Council is a state agency that funds and supports quality arts experiences to strengthen Ohio communities culturally, educationally, and economically. It supports creative expression for artists, organizations, students, educators, and for the public across its cities and towns. The Council ensures that the arts enhance quality of life, enrich education, build Ohio's economy, and tell stories of communities.

### An early adopter in search of a new solution

As a medium-sized arts granting organization, the Ohio Arts Council manages 1,000 to 1,200 grant awards at any given time, while reviewing an additional 1,000 new applications each year.

With the volume of information the Council had to review and process, they started looking early on for an online-based system as a means of consolidating their processes. "We moved away from a paper-based system back in 2005 and were one of the early adopters among state arts agencies to use an online system," says Dan Katona, Deputy Director of the Ohio Arts Council. "Online systems for grants management were so new [at the time]. It was a really exciting time for us to get involved in such an interesting process."

### A limited custom-built system no longer met their needs

The Council's first system was a custom one. They relied on an outside programmer to keep it working, as they had no way to make any changes themselves. But after 10 years they found that their system wasn't keeping up with the times or growing with the organization. "Since the system had been custom-built, it was going to take a significant amount of money to update. So much had changed in both the arts and technology landscapes, and what we had just wasn't meeting our needs anymore."



Looking for a grants management system that could grow and evolve with the changing times, Dan and his team started their search, and that's when they found SmartSimple Cloud for Grants Management.

"Right from the start, we were very impressed with both the balance of functionality and power that were the guts of the system," continues Dan. "Not only was what [SmartSimple Cloud] could do impressive, it was user-friendly, accessible, and we could work with it without needing to hire programmers. We're a small team without a lot of technical expertise, but we got the training we needed from the SmartSimple team to be able to manage the system ourselves. As a platform that could grow with us, it struck the perfect balance between being easy to use and still being nuanced enough to handle how we do things."

### An opportunity to update and integrate processes

It had been a long time since they'd really analyzed their granting process, so the team took their time reorganizing how they managed and administered their procedures. "It was great working with the SmartSimple team during this time. They really helped us review and revise how we did things, giving us some very intelligent changes and fixes. We discovered things along the way we'd never thought of, and were so glad to have the level of support we did."

In particular, the Council enjoyed working with SmartSimple's President, Cameron McLean, and Systems Solutions Architect, Bob Longworth. "Cameron and Bob were great to work with," adds Dan. "They never told us they couldn't do what we asked for, and they never made change requests seem like they were unreasonable. Even when we transitioned [from Implementation to Support], we were never made to feel like our questions were too trivial, or that we were asking too much."

**"Right from the start, we were very impressed with both the balance of functionality and power that were the guts of the system."**

**Dan Katona**  
Deputy Director

### A well-received grants management solution

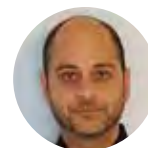
Feedback from all the Council's users has also been overwhelmingly positive. "Applicants and grantees are reporting the system is really easy to use and functions smoothly. We've also been impressed with the security of SmartSimple's system. A big concern for artists is intellectual property; knowing their work is protected and their identities are safe, so a robust and secure site is a big deal for us.

"As a steward of public dollars, we need to be aware and accountable for how and where we spend our money. SmartSimple Cloud is very reasonably priced since we only pay for what we use. We are glad to be able to share that we are being responsible with taxpayer funds."

"SmartSimple Cloud truly is an infinitely configurable system that makes our work better. We can make changes quickly, tally up information for reports at a moment's notice, and get funding dollars out the door without spending weeks and months getting programmers to set everything up for us. SmartSimple Cloud allows us to be nimble, and won't ever hold us back from executing big ideas or initiatives." ●



## Toronto Arts Council



**Communications and transparency are top priorities for the Toronto Arts Council.**

### At a Glance

The Toronto Arts Council (TAC) had been processing grants manually. Application deadlines would run late due to the sheer volume of data entry required, and the review process was generating literally boxes of paper. With SmartSimple Cloud for Grants Management, TAC was able to cut down significantly on the amount of paper they used and eliminated nearly all data entry work. With everything automatically tracked by contact in the system, they were also able to keep tabs on every single communication, eliminating concerns that emails or reports were past due or missing. They also worked with SmartSimple to create an interactive mapping feature that shows where their funds are being used to boost stakeholder transparency.

**SmartSimple client since:** 2013

**Type of giving:** Grants

**Dollars granted:** \$18 million annually

**Old system:** Manual process

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- Too much paper being generated,
- Too much time spent on manual data entry
- No way to properly track communications

### New system must-haves:

- Detailed communications tracking
- Reduction in paper files
- Less time on manual processing
- More granular reporting capabilities

"With communications features like group email and system-generated emails that are automatically saved, we have a complete record of each interaction with our applicants and clients. Every point of contact is attached to each individual's record in SmartSimple Cloud, so even when there is staff turnover, no historic knowledge is lost as everything is safely stored in our system."

**Andrew Suri**

Director, Grants Management



Toronto Arts Council is a SmartSimple Cloud user

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### About the Toronto Arts Council

Since 1974, the Toronto Arts Council (TAC) has been the city of Toronto's funding body for artists and arts organizations. From emerging to well established artists and arts organizations, TAC supports creative endeavors in every region of the city. Through its funding, TAC cultivates enrichment, and proudly reflects Toronto's vibrancy through the diversity of artists, arts communities and audiences it serves.

### A manual system with limited capabilities

The Toronto Arts Council (TAC) had been relying on an entirely manual process using a very old version of Filemaker - a cross-platform relational database application - to track data. "There was too much paper and we had limited resources for all the data entry and administrative work. As the years went by and the volume of programs and applications were increasing, it became clear we needed a better solution," says Andrew Suri, Director, Grants Management.

TAC brought in a consultant to help find a solution that would reduce both paper and manual administrative work. "After seeing SmartSimple's demo, it was very clear they were the answer we were looking for," continues Andrew. "The other systems we reviewed didn't provide the level of personalization we needed to structure a solution that would reflect how we work. None of the other vendors we evaluated had the diverse features to suit our needs. SmartSimple Cloud had the capabilities to do exactly what we needed. Their whole team was so focused and friendly. They knew the right questions to ask; they knew what they needed from us to build the system the way we wanted."

### Superior communications functionality saves time and effort

"The most impressive aspect of our SmartSimple system is how much it has improved our communications. With

communications features like group email and system-generated emails that are automatically saved, we have a complete record of each interaction with our applicants and clients. Every point of contact is attached to each individual's record in SmartSimple Cloud, so no historic knowledge is lost as everything is safely stored in our system."

"With SmartSimple Cloud, we have the ability to add notes to applications and reports to request further information. The system instantly sends an email to that person and shows them what specifically needs revising while locking down the rest of the document. This has been a real time-saver, eliminating back and forth emails with clients by making our request perfectly clear. Clients easily understand exactly what is being asked of them and they reply more quickly with the correct details the first time we ask."

"I also like the automated workflows. For example, we can set up automatic notices for grants officers for incoming reports required from clients. Instead of constantly having to dig through different spreadsheets to see if a report has been received, the grants officer is emailed as soon as it's entered."

"Another feature we have made great use of is the payment scheduler. We have a few programs that require multiple payments to be made either to different artists or over a specific period of time that rely on actions such as the reports. SmartSimple Cloud has smoothed out our entire process, ensuring timely award payments and reducing errors in our accounting activities. We can reconcile payments with our bookkeeper during audits and prepare specific paperwork for auditors so much more easily, saving hours of time digging out information and creating more spreadsheets."

### A new feature enhances funding transparency

"After our system had been up and running for a while, we went back to SmartSimple to ask if they could create a new tool for us. To provide complete funding transparency, we wanted to build a map on our website that would show all our stakeholders and the general public exactly where our grants were making an impact in Toronto. Our purpose was to ensure people knew that we were truly a city-wide arts funder, not just supporting projects in the downtown core, but all across Toronto."

The SmartSimple team created an interactive mapping feature for TAC that offered site visitors the opportunity to drill down into the data about each initiative TAC supported. Information can be accessed by art form (dance, theater, visual arts), type of venue, geographic region, and even by strategic initiative.

**"SmartSimple Cloud has smoothed out our entire process, ensuring timely award payments and reducing errors in our accounting activities."**

**Andrew Suri**

Director, Grants Management

"If you were interested in what musical events were funded in Scarborough, you would simply enter your search criteria and the map populates with the information you're looking for. By zooming in, you can not only locate the number of events taking place within that area, you can click on specific points on the map to see what exact initiative we funded, its location and whether the event is free or there is a charge to attend."

"The SmartSimple Cloud's mapping feature has been also a great way to share our data openly with City Councilors and the granting community to demonstrate our impact and openly show precisely where and how our funding is being used."

### Self-sufficiency and easier applications

"Overall, I love that we can manage the system without needing a dedicated IT support person on site. We were actively encouraged to explore and learn the system. I was so happy to discover we could do everything ourselves. And, since we have limited resources, not having so much time taken up with data entry has freed up our time to explore new initiatives."

The TAC community has also provided positive feedback. One grant applicant emailed TAC and said, "Your new online application is fantastic. It's intuitive, easy to follow and saves paper. Thanks for making things easier!" Grants adjudicators also found using SmartSimple Cloud saved time during the review process. "Because everything from the applicant is available to review online before the assessment meetings, we managed to cut some adjudication processes down from four days to two days."

"We would happily recommend SmartSimple to anyone looking for a grants management system," concludes Andrew. ●

## Edmonton Community Foundation



**How Edmonton Community Foundation revamped and standardized its grantmaking with automation and configurable user portals.**

### At a Glance

The Edmonton Community Foundation (ECF) was processing millions of dollars in grants but ran on an unreliable and inflexible form-based solution for its grantmaking. Before seeking a new solution, they had two critical problems with their old system: only having access to surface-level information on grant statuses; and functions that kept breaking, including the ability to export data and create reports. ECF's entire grantmaking lifecycle required intensive manual effort in email communications, updating grant opportunities, and weeding through qualified applicants.

By implementing SmartSimple Cloud for Grants Management, ECF has improved and gained efficiency within its grant management processes. The foundation realized this through automated communication tools, applicant and reviewer portals to edit, track, and change the status of grants, and the ability to link applicant and organization records to recreate recurring opportunities more easily. ECF found efficiency gains within its procedures, including robust reporting and tracking capabilities to inform the long-term impact of its grantmaking efforts.

"The transition [to SmartSimple Cloud] has been great because it hasn't interrupted our granting at all; we're still having the same positive impact on the community that we've always had."

**Nick Diaz**

Donor Grants Associate



Edmonton Community Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

**SmartSimple client since:** 2020

**Type of giving:** Grants, Student Awards

**Dollars granted:** \$25 million annually

**Old system:** An unreliable form-based solution with a lack of reporting capabilities

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- Significant manual tasks throughout the granting process
- Slow or delayed responses from vendor support
- Lack of visibility over applicant, organization, and application information

### New system must-haves:

- Workflow management for all granting programs
- Visibility in any stage of the granting process
- Advanced reporting and tracking capabilities
- Less admin time spent on application-related emails and support tickets

### About Edmonton Community Foundation

Formed in 1971 by the Edmonton Community Foundation Act, the Edmonton Community Foundation's (ECF) mission is to attract and manage endowment funds to make strategic investments enhancing the quality of life in Edmonton, Alberta, and throughout Canada.

ECF helps the people of Edmonton and the surrounding areas by encouraging philanthropy and funding charitable activities. Through contributions from donors, ECF raises and administers sustainable pools of capital so the returns can be sustainably reinvested in the Edmonton area.

### Too many kinks in their previous grantmaking process

ECF runs three grant programs through their web portal: A Community Grants program that has more extensive, ongoing capital requirements, a Small Grants program that approves micro-grants on a weekly basis, and Student Awards program. However, the previous system they were working with could not keep up with changing requirements and had limited depth of capturing grantmaking information and reporting on program data.



"Everything [in the old system] was very surface-level. We couldn't relate records, users didn't have profiles, and our tools would regularly break, such as exporting and reporting data," says Nick Diaz, Donor Grants Associate at ECF. When functionality did break, they experienced delayed vendor support, which in turn, delayed their mission-critical processes. "The turnaround times on support were not great," says Diaz. "When we started seeing features break, web pages failing, and the system not being able to export 500 student awards applications, we'd have to make a phone call to our support person, who could take two weeks to get back to us, which impacted all of our processes," continues Diaz.

Added to that, their previous system could also not reliably accommodate continuity when working with multi-year awards and grantees. "Our old system couldn't connect first-year and second-year requests. If an applicant asked for a renewal of an application, we couldn't connect it, and it couldn't produce reports," says Diaz.

Working with a form-based solution that didn't scale or offer the continuity ECF needed, the Foundation was starting to outgrow its system. They needed a system that was more flexible and scalable to add continuity to their work in the long term. "We didn't have a lot of depth in our system until using SmartSimple CLOUD for Grants Management, and we were challenged with exporting data. It was there, but it was hard to access," says Diaz.

### Quickly implementing a new system during a pandemic

When seeking a new grantmaking system, a leanly-staffed team of six required a more intuitive and reliable solution that could bring a new depth of intelligence to the data they process. ECF sought features that eased friction within every stage of their grant application process. From submission and grant status updates through to reviews and post-award communications to awardees. After an extensive search, the ECF team decided on SmartSimple Cloud as their new solution, since the more flexible platform-based technology would meet their needs and enable them to gain a more dynamic view into their grantmaking to inform future decisions.

**"SmartSimple Support has been very, very snappy with responses. When you open a ticket, you get a response within a day. It's really fast..."**

**Nick Diaz**

Donor Grants Associate

Working in tandem with SmartSimple's implementation team and an Account Manager, ECF opted to start fresh and not import historical data. While implementing SmartSimple Cloud for Grants Management, the ECF team found the process highly collaborative along the way. "When SmartSimple was building out the system, we got to go in and give our feedback in a very structured way throughout the whole process," says Diaz.

Within about 100 days, ECF had a new solution implemented by June 2020 without causing any lapse in their programs, even amidst COVID-19 lockdowns. "We did this whole transition from our home offices... The transition [to SmartSimple Cloud] has been great because it hasn't interrupted our granting at all; we're still having the same positive impact on the community that we've always had," says Diaz.

### Greater efficiencies in the grantmaking lifecycle

Only a few months into using their new system, Diaz and the ECF staff have already gained a new depth of intelligence into their grantmaking. "It's nice to finally have user profiles, so we can go look at an individual and see their history with the system," says Diaz. With a more intuitive solution housing and tracking all the data they needed in one place,



ECF can link contacts to records, such as applicants to grants and reviewers to assigned grants, and develop a more straightforward organizational hierarchy of all their internal and external community users. “Linking records have been very powerful. It’s all connected now, where before it was very disconnected,” says Diaz.

User portals have been an integral element in many of ECF’s workflow efficiencies. From reviewer portals that can assess, approve, or decline submissions, to applicant portals that can track their grant status and easily revise in-progress submissions. “When the grant applications come in, applicants can log into the system, see what’s available to them, and hit ‘apply.’” We don’t even have to create new applications every three months, like we used to. We have the same application that opens and closes again,” says Diaz.

ECF has realized greater efficiencies in staging their grant lifecycle, since every stage is now tracked all in one place. This, in turn, has enabled the foundation to evolve their process. “Before, we would receive the application, and then it would leave the system that we were using once it moved to the review stage. Now, everything is built into the system where we can segment application stages like ‘draft,’ ‘submitted,’ ‘approved,’ and ‘reported.’ This forced us to standardize our process. It was less about the system and more about having us have to rethink ourselves,” says Diaz.

### A more responsive support experience

With the inconsistent services of their previous system, ECF’s lean team experienced delays in responses from their own applicant and user support requests. Since implementing SmartSimple Cloud for Grants Management, ECF now has access to SmartSimple’s support teams that quickly assist any of their support tickets which, in turn, substantially reduces the amount of time to respond to their users’ questions. “SmartSimple Support has been very, very snappy with responses. When you open a ticket, you get a response within a day. It’s really fast,” says Diaz. Applicant support has also been enhanced through the use of internal communication and automation features.

“Applicants can send questions through the system or by email. And when they hit the ‘submit’ button, it saves us so much time by sending them their application as a PDF attached to an automated email. Before that, we were doing it manually,” continues Diaz.

The grant approval and decline emails have also been automated, saving hours of administrative time for the ECF staff. “We used to have to send decline and approval emails that would take many days to email 40-50 people more detailed notes about why they’ve been declined or approved. It now takes hours,” says Diaz.

### More automation, less stress

Using features like the Canada Revenue Agency (CRA) integration, grant applicants can self-register and use their CRA code to pull in their details. This reduces any errors and inaccuracies with organization details since they’re pulled directly from the federal tax database. “Now, we’re not getting people making accounts that aren’t even eligible. It’s weeding out all the people that can’t even apply anyways,” says Diaz.

ECF is now utilizing automated email workflows to reduce administrative time to focus more on strategy. “We were mail merging emails to every single applicant, whether they were denied or approved, and sending that to over 50 people every time,” says Diaz. With automated emails, every time an application is approved or denied, an email will automatically be sent to the applicant with their associated notes.

Applicants are also benefiting from flexible SmartSimple Cloud features. “We set it up so that grant applicants can add co-editors of their submissions. If they’ve hired someone as a grant writer, they can invite them into the application to work with them. Before it was only one user per application,” says Diaz. This feature enables applicants to collaborate with their teams to submit the best and most accurate application they can, which increases their chances for approval.

### Getting ready to help a broader community

ECF already has their eyes on the future and how to further expand their system, including integrating their financial processes for even more continuity. The foundation is also looking to add more programs into the system, including their scholarship program, which will impact a broader community. “Once we go live with our scholarship program, we’ll be going from a few hundred organizations to thousands of individual students,” says Diaz. ●



## Georgia Family Connection Partnership



**Superior scalability and flexibility for evolving processes increases self-sufficiency for Georgia Family Connection Partnership.**

### At a Glance

The custom-designed system being used by the Georgia Family Connection Partnership (GaFCP) had failed to keep pace with the speed at which GaFCP's work was evolving. They required a solution that was responsive and adaptable to the changes in processes taking place within the organization, not just today, but well into the future.

With SmartSimple Cloud for Grants Management, GaFCP found a system that met their requirements and more. SmartSimple Cloud had the functionality to meet their complex reporting requirements and automate much more of their process, saving time and resources. GaFCP also became a Premium Support Services client, increasing their internal knowledge base and providing even more options for personalized configuration that the team could build on their own.

**SmartSimple client since:** 2014

**Type of giving:** Grants

**Dollars managed:** \$7,711,500 for 2018

**Old system:** Custom

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- Files too spread out
- Custom system couldn't keep up with process changes
- Updates to the system were expensive and time-consuming

### New system must-haves:

- Centralized files
- Fast and easy to make changes and update system
- Able to add new functionality on our own



"SmartSimple Cloud had functionality that made it a far superior choice than any other system available. I saw so much that we as an organization could make use of to improve other processes we knew could use updating."

**Celeste Orr**

IT Resource Coordinator



smartsimple  
**CLOUD**

Grants  
Management

Georgia Family Connection Partnership is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Georgia Family Connection Partnership

Georgia Family Connection Partnership (GaFCP) brings more than 3,000 local and state level partners together from all across Georgia's 159 counties. GaFCP works toward measurably better outcomes for Georgia's children, families, and communities. GaFCP is the only statewide network of its kind.

At the local level, they connect their partners to the resources they need, help coordinate and manage efforts, and empower communities to craft solutions based on local decision-making. At the state level, they provide expertise in planning and governance, and administering state-appropriated funds for collaborative community initiatives.

### Custom-built system lacks adaptability

GaFCP originally had a custom grants management system built to accommodate their grants processing needs. They eventually found they had outgrown its capabilities, and the vendor just wasn't able to keep up with the changes they needed. "As our initiative grew, we found we needed to make more and more frequent changes to our grants management system, but the vendor wasn't able to turn our requests for support around fast enough or economically enough for us," says Celeste Orr, IT Resource Coordinator.

The team decided to go shopping for a new vendor with a much more adaptable solution that could keep pace with the updates and amendments they needed. "We did a lot of research before we made a decision on a new system. The



Idealware Guide to Grants Management Systems was a great resource for us. It contained comprehensive comparisons for dozens of possible solutions.”

“I was personally hoping that we could find a solution that would do more than just report on what we were doing. While that was, obviously, functionality we needed, we were looking for a system that would be able to perform other tasks, like tracking our contacts and sharing application files with our stakeholders and those of us administering the daily work of GaFCP.”

### **Ease of report creation and accessibility key requirements for a new system**

GaFCP’s reporting needs were complex and needed a system that would be accessible not just to the internal team, but to the nearly 200 grantees who were required to regularly provide reports on an ongoing basis as to how their funding was being used.

After seeing a demo of the system, Celeste and the team decided SmartSimple Cloud for Grants Management would be the ideal solution for them. “It was evident from the moment we saw SmartSimple Cloud in action, there would be a multitude of benefits implementing SmartSimple Cloud over any other option available on the market.”

“SmartSimple Cloud had functionality that made it a far superior choice than any other system available. I saw so much that we as an organization could make use of to improve other processes we knew could use updating. Providing members of our community their own permissioned access portals so they can modify their own information whenever they need is so much more efficient. It not only ensures our contact information is always up to date, but takes a load of communication and data management work off of our internal team.”

**“It was evident from the moment we saw SmartSimple Cloud in action, there would be a multitude of benefits implementing SmartSimple Cloud over any other option available on the market.”**

**Celeste Orr**

IT Resource Coordinator

### **The advantages of regular and reliable vendor communications**

During the implementation phase of the project, SmartSimple met with the GaFCP team every week to ensure everything was on track and address any questions. “The weekly update calls were really helpful for us. The team felt confident that all our questions were being answered and that the process was on track and being managed effectively.”

After working with their system for a couple of years, GaFCP decided to add Premium Support Services to their service package. “Conversations with our Dedicated Support Representative and with Eric Lauer, Director of Customer Experience, provided great insight into how I could configure some SmartSimple Cloud features on my own. I have a sociology background so am certainly no programmer, but having the tools to help make the lives of our end users easier is so refreshing! Sure there was a learning curve, but I’ve saved a lot of time by being able to call someone directly who knows everything about our system and can help me make changes and add functionality quickly and with less effort than I imagined.”

Celeste and her team have created their own suite of materials - including videos and a discussion board - to ensure new staff and external users have everything they need to start working with SmartSimple Cloud for Grants Management right away. “It’s so easy for new users to jump in and start using the system. We’ve actually heard people say this is the easiest transition to a new system they’ve ever experienced.”

“Any time I’m at a conference or tradeshow and someone asks me what I think of our SmartSimple system, I am always more than happy to share how positive our whole experience has been and how much SmartSimple Cloud has improved how we work at GaFCP.” ●

## Grand Rapids Community Foundation



**How the Grand Rapids Community Foundation created a versatile grants management platform that improved their customer service and user experience.**

### At a Glance

Grand Rapids Community Foundation had long developed and maintained its own grants management system. Although this provided the foundation with a high level of control, the foundation ultimately decided to get out of the business of developing grants management systems. Grand Rapids Community Foundation therefore had to find a replacement system that was less cumbersome for the end user and removed known barriers from the perspective of the grantee.

#### SmartSimple client since: 2014

**Type of giving:** Grants, program-related investments, scholarships

**Dollars granted:** \$172 million through 22,000 grants

**Old system:** YourCause (Good Done Great)

#### SmartSimple product/services:

- [SmartSimple Cloud for Grants Management](#)

#### Key pain points:

- Previous system was difficult to use
- Inflexible to changing organizational needs, along with configuration
- Changes were cumbersome to apply

#### New system must-haves:

- Increased flexibility
- Improved ease of use and user experience for staff and grantees
- Access to reliable and responsive support

"SmartSimple is one of our better experiences working with a vendor."

**Ann Puckett**  
IT Manager



Grand Rapids Community Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Grand Rapids

Grand Rapids Community Foundation supports the community of Grand Rapids, Michigan through the creation and management of a permanent endowment. Support is provided through philanthropic giving in the form of grants, initiatives, program-related investments, and scholarships. Since their inception in 1922, Grand Rapids Community Foundation has provided funding of over \$172 million through 22,000 grants.

### Selecting SmartSimple Cloud

Having developed and maintained their own system for many years, Grand Rapids Community Foundation staff knew exactly what they wanted out of a grants management system and, as such, insisted on a system that is flexible and easily personalized in terms of functionality and user experience.

In addition to seamless technology, they were also looking for a vendor who could be a trusted partner; a vendor that could deliver on its promises, that had a strong reputation for customer service and that operated with a sense of integrity.

### Working with SmartSimple

Months after selecting SmartSimple Ann Puckett stated that, after six migrations over the course of three years, the relationship with SmartSimple "is one of our better experiences working with a vendor. The implementation team has been outstanding in delivering on promises and in looking for ways to make the system better."

Would Grand Rapids Community Foundation recommend SmartSimple? They already have! Ann found that SmartSimple's implementation and customer support process has been consistent, professional and very client-focused throughout. ●





## GROW Central Florida



**How the GROW Central Florida Program turned from passion project to a highly-recognized organization in 6 months.**

### At a Glance

GROW Central Florida was a brand new and expanding nonprofit organization in dire need to “grow” out of their paper-based management system. With an administrative team of one, too much time was getting lost tracking down applicant information through emails and collecting information through different filing systems and Excel spreadsheets. In one month, SmartSimple configured a platform that centralized all of their key applicant and inventory information and easily managed their daily tasks.

#### SmartSimple client since: 2018

**Type of giving:** Recess toys for schools and durable goods and resources for running programs, new running shoes for students, and playground revitalizations

**Old system:** Paper-based and Excel spreadsheets

#### SmartSimple product/services:

- [SmartSimple Cloud for Grants Management](#)

#### Key pain points:

- Too much administrative time tracking down equipment orders and requests scattered in different documents and filing systems

#### New system must-haves:

- A centralized, online program organizes applicant information and resource requests
- A shared calendar that tracks rental timelines and reservation dates
- A platform that creates comprehensive reports on milestones and organizational activities

“SmartSimple has given me an avenue to serve more people.”

#### Colleen Gonzalez

Founder & Executive Director



GROW Central Florida is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About GROW Central Florida

Founded in 2015, GROW is a nonprofit organization that provides material support to increase opportunities for physical activities and healthy living for Central Florida school children. In an effort to help teachers not have to pay out of pocket for equipment, GROW partners with grassroots volunteers, local law enforcement to assist poorly-funded school health & wellness programs in Central Florida to support cross country running programs, playground revitalizations, recess toys for schools, shoes for runners in need, and family engagement events. GROW Central Florida’s work has been gaining recognition including nomination for Florida Blue Foundation’s Sapphire Awards.

### Big problems for a small organization

GROW Central Florida was experiencing administrative difficulties for an organization with one full-time administrator and one volunteer driver. While serving 44 schools with unique needs, they were struggling to manage their inbound inventory donations and request forms for equipment rentals through paper-based forms. Colleen Gonzalez, Founder & Executive Director of GROW, stated “we were working with paper and spreadsheets and it was a nightmare. I was constantly circling around and had to hunt down where all the equipment was.” GROW was facing difficulties tracking when schools needed the equipment, how long, and how many items because the information was scattered through different emails and spreadsheets.

When looking for a solution, Gonzales sought a “one-stop-shop” to keep all inbound and outbound workflows organized and centralized. “We needed to funnel everything into one place, especially when people need something, they can request it through the platform.” In a nutshell, GROW was looking to simplify their process and ease the administrative workflow. SmartSimple answered the call.

### Shedding paperwork and growing projects

When building the system, SmartSimple was helpful every step of the way and Gonzales loved working with the support staff. “The people that helped build the portal were amazing. The SmartSimple staff were very specific and communicative.” Once the program was configured to GROW Central Florida’s needs in a matter of months, they experienced immediate benefits.

**“The SmartSimple staff were very specific and communicative.”**

**Colleen Gonzalez**

Founder & Executive Director

Gonzales found organizational value in the flexible features that helped declutter the equipment request process. “SmartSimple Cloud’s user portals allow schools to ask for exactly what they need, much like a library. Schools can ask for a reservation date to borrow from our inventory, and the calendar function allows them to know where their goods are and when they’re promised to be returned.

By utilizing the SmartSimple Cloud’s automated system features, Gonzales saved a lot of administrative time. “There is no more back and forth in emails to sign contracts and agreements, and I don’t have to have binders full of papers.” Their system uncluttered the process of collaborating with school staff and volunteers as well through automated workflow emails, “everyone gets a notification alerted people on progress on their requested equipment.”

### Looking towards the future full of growth

Fully equipped with a system that centralized their workflow and data, GROW found value in tracking their progress and were able to report and present their accomplishments to new schools and counties through compelling presentations and visuals. Gonzales states, “people can’t argue with the numbers, and the numbers really shine through with our data-backed presentations.”

GROW now has 40 volunteers in their system and their goal for 2019 is to expand their programs to new counties (Orange, Lake, Seminole, Polk) to continue to offer more resources to low-parent engaged and low-resource communities.

As of October 1, 2018, Colleen quit her full-time job to become executive director of GROW due to the success and efficiency of the program. Gonzales can now document more numbers and can apply for larger grants. By simplifying their administrative processes, GROW Central Florida can focus on their mission and helping kids grow up healthy and happy, “SmartSimple has given me an avenue to serve more people.” ●



## New Hampshire Charitable Foundation



**How The New Hampshire Charitable Foundation simplified their complex grants and scholarship management process.**

### At a Glance

The New Hampshire Charitable Foundation has a complex array of processes to manage thousands of grants and scholarships each year. Yet, even with two grants management systems running, they found they still needed to do most of their own configuration. Then, one vendor changed focus and decided to no longer support foundations, meaning the limited amount of help they were getting was about to disappear.

The Foundation heard about SmartSimple Cloud's impressive range of online capabilities and the reliability of the platform from colleagues in the community foundation space. The Foundation discovered that they could indeed have their entire suite of programs stored and managed safely from the cloud. Being completely online meant they could handle the complexities of their grants and scholarships much more easily than before, with individual portals for every applicant, reviewer, and team member. The Foundation eliminated paper, put every stage of their programs online and saved money since they only had to pay for what they actually used. The configuration work they had to handle in the past was now supported by SmartSimple Cloud, and help was only a click, call or email away.

"Keeping everything in one system and being able to centralize our entire program has made the wide range of funding opportunities we offer our communities so much easier to manage."

#### Hilary Miskoe

Student Aid and Program  
Technology Manager



New Hampshire Charitable Foundation is a SmartSimple Cloud user

#### SmartSimple client since: 2017

**Type of giving:** Scholarships, application grants, donor-advised funds

**Dollars granted:** More than \$40 million annually

**Old system:** Grants Edge, Good Done Great

#### SmartSimple product/services:

- [SmartSimple Cloud for Grants Management](#)

#### Key pain points:

- Previous online grants management systems were not sufficient for saving time in the application review process

#### New system must-haves:

- High level of security
- Regular vendor updates
- Solid support offering
- Able to house their entire process in one location
- Manage multiple application types and programs
- Able to process scholarships
- Multiple user access
- Seamless transfer of data from current system to their new platform

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About the New Hampshire Charitable Foundation

The New Hampshire Charitable Foundation is New Hampshire's statewide community foundation, founded in 1962 by and for the people of the state. The Foundation manages a growing collection of 1,900 funds created by generous individuals, families, and businesses, and awards more than \$40 million in grants and scholarships every year.

The Foundation works with generous and visionary citizens to maximize the power of their giving, supports great work happening in our communities and leads and collaborates on high-impact initiatives to make New Hampshire better for all. Their areas of support include arts and culture, civic engagement, education, the economy, health and well-being, and the environment.

### Trying to manage with limited system capabilities

The New Hampshire Charitable Foundation was using a combination of two different grants management systems to administer a rather large number of application grants and scholarships. “This was our first time putting our grant applications online,” says Hilary Miskoe, Student Aid, and Program Technology Manager. “The system was inexpensive, and even though our vendor told us we wouldn’t need to do any of the customization work, we did, in fact, wind up doing a lot of it ourselves.”

“We also learned that our supplier would no longer be focusing on foundation and nonprofit clients. They had decided to change their business model, so the limited support we had would not be there for us any longer,” continues Hilary.

### The challenge of finding a competent partner

The Foundation had a long and detailed list of features and functionality they wanted in a new system. “We certainly didn’t want to lose any of the functionality we had with our previous grants management system, but it wasn’t the easiest program to use. We were looking for a solution that would offer a great deal more flexibility, a high level of security, integration capabilities, and the ability for everyone — staff, applicants, and reviewers — to be able to use the platform for their part of the grants process.”



The Foundation was seeking a platform that would keep them up to date on the latest technology and offered a superior customer support model. “Some of the options we saw would require us to implement a multitude of individual modules to handle each stage of each program, which was not going to work for us. We also wanted multiple users to be able to log into the system at the same time. We’d had to share login for the entire organization with one of our previous systems, and it was not a great solution.”

Hilary and her team started doing the research needed to find a new system that would be able to manage their very complex processes. “We must have looked into 10 different vendors, and were able to eliminate over half of them pretty quickly because they couldn’t handle the level of sophistication involved in our processes. One vendor even told us right up front they’d be unable to meet our needs.”

The Foundation was looking to have the entire system configured but still have the ability to easily reset passwords, modify application forms, intuitive navigation, and have mobile access. “Because community foundations have a very unique granting process due to the number of other organizations we support, we asked a lot of questions of potential vendors and also of other nonprofit colleagues. We wanted to know what other organizations were using and how they were managing.”

### Making the move to complete process automation

“We’d heard about SmartSimple Cloud, and had received good feedback on the platform. We saw they could provide everything we were looking for.” The Foundation presented SmartSimple Cloud with a challenging timeline for launching their new solution. “We were working with a very ambitious agenda because we needed to get the new system up and running before our old system expired.

SmartSimple completed all the required configuration we needed and kept on track with the demanding schedule we created. Their implementation team presented us with a complete work back schedule, detailing all the milestones set to meet our required launch date. SmartSimple met every single deadline, so we knew we could rely on their work being done when we needed it. We never heard ‘oh, we’ll get to that next week/next month’, every aspect was delivered when and as promised.”

### Up and running

“The biggest advantage of a configurable system over a basic out-of-the-box product is that there are no limits to what you can do. With SmartSimple, we received proper training. We also had — and still have — access to the SmartSimple video channel and the SmartSimple Wiki. If we need to talk to someone, we simply call the technical support team for assistance.”

“How important is it that we finally had a completely configurable system? Very! Not only do we have a multitude of programs to manage, we have all the pieces of the application, review and awarding process to complete for every grant and scholarship instantly organized and stored securely in one place.”

Another great feature the Foundation likes is their backup system. “It’s great to have an entirely separate environment from our live system where I can try out new features and functions, so if I break anything it’s not critical to our live environment.”

Being able to administer every aspect of our broad range of programs online has meant there’s absolutely no need for paper anymore. We’re also really excited about the donor portal. It’s such a great feature; any community organization looking for funding can simply log into SmartSimple Cloud and see all potential granting opportunities available to them,” concludes Hilary. “Keeping everything in one system and being able to centralize our entire program has made the wide range of funding opportunities we offer our communities so much easier to manage.” ●



## Vancouver Foundation



**How Vancouver Foundation created an efficient process to maximize its grant funding.**

### At a Glance

With over 200 different funds to grant from and hundreds of new proposals submitted each year through different granting calls, Vancouver Foundation had difficulty being efficient and effective through its collection of segregated in-house processes and systems.

[Gen3](#) configured an intuitive application process from application submissions to post-grant reporting that also assisted the Foundation to maximize the funding available. Their new flexible system allowed them to rethink and develop new, innovative work strategies to scale their work into the future.

**SmartSimple client since:** 2018

**Type of giving:** Grants

**Previous Platform:** Enterprise Resource Planning (ERP) software along with Excel spreadsheets and Word documents

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key challenges:

- Too many systems working in isolation of each other
- An inefficient grant application process

### Gen3 Impact:

- Built integrations to centralize data from managing grant programming, volunteer reviewers, and meetings
- Implemented a set of taxonomy search tool for fund matching and data analysis



"We can see better now where the opportunities are to improve and then move forward from there."

**David Doig**

Director of Field of Interest Grants



Vancouver Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Vancouver Foundation

Vancouver Foundation is a community-inspired foundation that connects the generosity of donors with the energy, ideas and time of people in the community. Since 1943, they've brought together donors, non-profits and charities, government, media, and academic institutions, local leaders, and passionate individuals to build meaningful and lasting change in the Canadian province of British Columbia.

### Bound by an inefficient process

Vancouver Foundation's granting process has been disjointed and inefficient. They worked with a legacy Enterprise Resource Planning (ERP) system, an online application portal they built themselves, and a variety of Word and Excel documents to receive, assess and track multi-year funding proposals and commitments.

"Although the systems we created to manage specific points in grantmaking process worked well on their own, it was always a challenging and labour intensive process to understand and analyze our caseload at any point in time," says Dave Doig, Vancouver Foundation's Director of Field of Interest Grants.

"Although the systems we created to manage specific points in the grantmaking process worked well on their own, it was always a challenging and labour intensive process to understand and analyze our caseload at any point in time," says Dave Doig, Vancouver Foundation's Director of Field of Interest Grants.

### The search for a configurable grantmaking system

The foundation wanted to simplify their current process, while having the capability to innovate their work for more

community impact.

Not only did Vancouver Foundation want to simplify their current process, but they also wanted the capability to innovate their work for more community impact. “At the time we were looking for new software, we had been using our in-house process for a couple of decades. We realized that we only knew grantmaking from our own entrenched perspective, and so hoped that working with a new solution would lead to new methods and ideas about how to be more effective,” says Dave.

They also recognized the importance of finding a solution that could be owned and managed by the granting department, instead of by a small IT team. Dave was impressed by Gen3’s collaborative approach and the team’s ability to translate the Foundation’s needs into a highly tailored plan that effectively incorporated the Foundation’s most pressing requirements.



### A system that fulfilled on its promises

An important goal for the foundation was to find a way of maximizing the number of grants they could make. In order to do this, they had to come up with an efficient way of quickly identifying grantseekers that aligned with their program objectives. To tackle this, they worked with Gen3 to develop a number of taxonomy-based search assist tools that could be used at each of the workflow stages.

Within their SmartSimple Cloud for Grants Management system, they code every proposal, fund, and volunteer using the same taxonomy. They then use the taxonomy assist tools developed by Gen3 to put their review panels together, by grouping like proposals and pairing them with the right volunteers who have the necessary perspectives to review the proposals. Next, they use the fund search tool to identify funds that are most aligned to the purpose of a specific grant proposal, beginning with the most restricted funds first.

At the end of the process, they use SmartSimple Cloud’s list views, dashboards and reporting functionality to understand and describe the characteristics and breath of the caseload, based upon the taxonomy. “Our taxonomy is four levels deep for each of the Purpose, Place and People categories, and the search tools need to take that into account. It’s quite amazing that way!” states Dave.

Their SmartSimple Cloud Platform went live in July 2018 and the responses from most users were immediately positive. “Our applicants appreciate being able to submit all of the proposal details using just one online form and our volunteer reviewers love using the system to assess and rank the proposals,” says Dave. Not only have the search assist tools made the overall process more efficient, it’s also helped Vancouver Foundation to demonstrate their effectiveness at maximizing the funds that donors have left to its discretion to support a wide range of community-led initiatives.

### Support from all sides

The creation of Vancouver Foundation’s system took a collaborative approach. Dave reflects that “the Gen3 team checked in regularly with us. They were really good at presenting ideas and were more concerned about being an ally instead of selling us a system.”

On an external level, Vancouver Foundation’s team appreciated the support and connection found within the SmartSimple community of users. “We like the ability to talk to other foundations and to learn from them.”

### Looking forward to the future

Vancouver Foundation is looking forward to further leveraging the dashboard and reporting abilities to help tell their story. By simplifying their processes, they now have a clearer view of what to improve. “We can see better now where the opportunities are to improve and then move forward from there.”

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## Egmont Foundation

EGMONT

**From applications to audits: How The Egmont Foundation saved time in every aspect of their grantmaking process.**

### At a Glance

Turning the corner on their 100th year of operation, the Egmont Foundation had been running an exhaustive and time-consuming grantmaking process living on physical files in a cabinet. While some applicant and grant data was housed in a central spreadsheet, information went missing or incorrectly entered. SmartSimple developed a system powered by SmartSimple Cloud that centralized all data in one location, automated key processes, handled payments, and gave administrative staff more control of quality data.

#### SmartSimple client since: 2018

**Type of giving:** Grants to help provide equitable access and opportunities to education in accordance with the United Nations Sustainable Development Goal #4

**Dollars awarded:** €13 million annually

**Old system:** Physical papers and spreadsheets

#### SmartSimple product/services:

- [SmartSimple Cloud for Corporate Social Responsibility](#)

#### Key pain points:

An inefficient and error prone manual grantmaking process through Excel spreadsheets and physical paperwork.

#### New system must-haves

A system that centralizes all data in one central place, has robust reporting capabilities, and handles payment processes



"We didn't want to be constrained by how the system worked, and we didn't find that with SmartSimple Cloud."

**Jakob Roepstorff**  
Program Manager



Egmont Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Corporate Social Responsibility >**

**Request a Demo >**

### About The Egmont Foundation

The Egmont Foundation is the philanthropic arm of the leading Denmark-based global media corporation, Egmont Group. The Egmont Group works in the digital and print media sector in countries including Denmark, US, China, Sweden, and Australia. Established in 1920, the corporate foundation works to alleviate the consequences for children and families living in poverty. Today, their mission is to protect young people against "modern poverty" – the lack of learning and life skills. Since their inception, they've spend €13 million (US \$14.5 million) on philanthropic activities per year and have donated a total of €410 million (US \$450 million) to date. They actively work toward the United Nations Sustainable Development Goal (SDG) #4 – Quality Education.

### 1000s of applications. 1000s of headaches.

The Egmont Foundation works with an annual budget of €13 million (US \$14.5 million). Being such an established foundation, they receive a lot of applications. However, this doesn't mean that every application is in alignment with their philanthropic mission. To make matters more difficult, it was a daunting task to review each physical application that came in. "Our application process wasn't effective and was a waste of time weeding through applications that didn't have relevance to our work," says Jakob Roepstorff, Egmont Foundation's Program Manager. So the team moved to an invitation-only process where they find projects they want to fund. In fact, half of their initiatives were a result of outreach alone. After they find programs they're interested in, they ask them for a two-page inquiry.

In their mission to address SDG #4 – Quality Education, the corporate foundation needed to devote more time to applications that focused on driving outcomes around this primary cause. By making their grantmaking more efficient, this outreach-based intake method narrowed down the review process from 1000 applications to 100. However, even when an application is approved, their grantmaking process was still a lengthy one. "Each application is handed back



and forth at least four to five times with the applicant,” says Roepstorff. The Egmont Foundation wanted a system to cut down administrative time on paperwork and correspondence and create more time for meaningful conversations with applicants.

### Data getting lost in the shuffle

“Our data was all over the place. We were working with old-school, physical files in the cabinet,” says Roepstorff. The Egmont Foundation’s grantmaking process was hinged on “one gigantic spreadsheet” for storing all its data. While it was only meant to be this way for six months, it stuck for ten years. As the spreadsheet got bigger and bigger, so did the administrative strain. “With four to five people working on this spreadsheet, lots of data went missing and was entered incorrectly,” continues Roepstorff. Information kept getting lost and working with physical mail as the form of correspondence with people

wasn’t helping the issue. “Staff would print out forms, set them down, and lose them,” says Roepstorff. “We needed a new grantmaking system for a long time.”

### An automated system without constraints

When working with SmartSimple, Egmont Foundation was delivered a fully tailored system powered by SmartSimple Cloud that centralized all of their giving data in one place. This flexible system was configured to not only automate some of their key processes, including receiving and managing inquiries, processing payments, and reporting finances, it also had the robust capability to report specifically to their SDG efforts. Most importantly, it was a system that carefully fit their needs. “We didn’t want to be constrained by how the system worked, and we didn’t find that with SmartSimple” says Roepstorff.

**“Our staff have customized dashboards with relevant grantmaking activities. Also, the Foundation’s payments are done by a third-party and it makes the auditing process much easier because all of the financial numbers are accurate and reported.”**

**Jakob Roepstorff**  
Program Manager

While many foundations have grants management systems where anyone can log into, the Egmont Foundation created a different approach with theirs. “We had a discussion and proposed the idea that applicants and grantees wouldn’t need to have access to the system, which would cut out unessential communication from within the system,” says Roepstorff. This access control helped with only including important and relevant mail for the process, ultimately leading to much more control over their giving data.

### More efficient application submission models

“We’ve saved a lot of time internally with looking at applications,” says Roepstorff. With their system powered by SmartSimple Cloud, the Egmont Foundation has a more proactive approach to looking at applications with more efficient application submission models. Internally, their processes are also running more efficiently. “Our staff have customized dashboards with relevant grantmaking activities. Also, the Foundation’s payments are done by a third-party and it makes the auditing process much easier because all of the financial numbers are accurate and reported,” says Roepstorff.

### Building for a brighter future with SDG’s

After only a year, the Egmont Foundation has ideas on how to build on their system. “We’re building on the reporting aspect with OData (Open Data Protocol) for real-time data in our system,” says Roepstorff. By having clear models of data reporting, they can more effectively report against their SDG goals, their impact and create larger strategies to address global issues. “It’s been fun in getting to know the system and discovering how we can develop it even further. The amount of possibilities are huge. It’s all about figuring out what you want to do,” says Roepstorff. ●

## Global Corporate Foundation

**How one Global Corporate Foundation saved 70% on user fees with SmartSimple.**

### At a Glance

The Foundation, the philanthropic arm of a global food and beverage company, had been spending a large amount of money on user fees with their supplier, CyberGrants, even though many of their users were only in the system a few days a year. In addition, the service had been declining significantly in recent years. A serious system crash went unresolved for an extended period of time and their customer support lacked a sense of urgency when responding to requests. Looking for a change, the Foundation selected SmartSimple Cloud because of their usage-based pricing model, strong Customer Support, as well as the flexibility and scalability of the SmartSimple Cloud platform to support their increasingly complex needs.

**SmartSimple client since:** 2016

**Type of giving:** Grants

**Dollars granted:** Approx. \$80 million annually

**Old system:** CyberGrants

**SmartSimple product/services:**

- [SmartSimple Cloud for Corporate Social Responsibility](#)

### Key pain points:

- Lack of system stability
- Unresponsive customer support
- High user-based fees

### New system must-haves

- Usage-based pricing model
- Flexibility
- A high level of security
- Personalized support offering

"With SmartSimple Cloud, we knew we could build something that would meet everyone's expectations. This was not going to be just a one-time relationship but a partnership that would build synergy for both organizations."

**A Foundation Representative**



Global Corporate Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Corporate Social Responsibility >**

**Request a Demo >**

### About our Client

One of the world's largest food and beverage companies, the Atlanta, Georgia-based company's charitable foundation is a world-wide philanthropic organization, committed to giving back at least 1% of their prior year's operating income annually. As of 2020, they have awarded more than \$139 million, providing grants for water and the environment, the economic empowerment of women and community well-being. More than 432 organizations have benefited from their donations in over 154 countries and territories.

### CyberGrants system failure prompts the quest for a new solution

The Foundation had been using CyberGrants as their granting solution since 2009. However, they experienced a rash of issues around system functionality and customer support. "We suffered a major system crash and the vendor wasn't able to respond and fix the problem in a timely manner," says one Foundation representative. "We already felt we were spending considerably more than necessary on user fees, so we took this as an opportunity to check out the market and consider implementing a new system."

The grants management team knew that an out-of-the-box solution would not meet the Foundation's complex needs. "The Foundation has a very unique situation. We receive about 6,000 unsolicited applications a year. As an international company, we rely on the recommendations from our global business units as to where our funding should go. There are only 10 of us on staff, and there are business units in countries all around the world. Without the ability to collaborate with them, we'd be unable to keep up-to-date on philanthropic organizations across the globe, so we need their valuable input."



"The local offices have their own philanthropic programs, so it's entirely possible for an organization to receive funding from an office in Japan, then apply for funding from the global Foundation. At that stage, the Japanese office has to approve the application before they qualify for global funding. Add to that our employee giving program and you have a lot of information that needs to be entered, stored, tracked and reported on."

But it was the high user fees that were the major underlying issue. The Foundation had spent a great deal of money each month on user fees because CyberGrants charged the same access fee for everyone, no matter how often they were or were not in the system.

### People make the platform

After narrowing down their search to two potential vendors, the grants team decided on SmartSimple Cloud. "What really impressed me was the attitude of the SmartSimple team. While yes, platform functionality and cost was very important to us, it wasn't as important as a company's culture and their attitude towards cooperation. With SmartSimple Cloud, we knew we could build something that would meet everyone's expectations. This was not going to be just a one-time relationship, but a partnership that would build synergy for both organizations."



The Foundation staff were impressed with their seamless implementation and how smoothly their system worked from the get-go. "I love that the platform is fully configurable. Whatever we want to do, SmartSimple Cloud can accommodate and make it happen. The SmartSimple Cloud workflow is completely different from any other we've seen or used. We can decide on how it functions rather than needing to change our process to match the limitations of the system."

"We also appreciate the great Technical Community Support team at SmartSimple. The Technical Community Support team is much more dedicated than at other companies. They have helped us not just with the administration of our system, but with the actual configuration as well. They always complete tasks on time and have extended hours that accommodate the needs of all our offices from around the world."

### Significant reduction in the cost of system access

The Foundation is saving 70% annually thanks to SmartSimple's fee structure. "With SmartSimple Cloud, we have the advantage of flexible user fees, so we're only paying for the amount of time people are actually in the system. We're also taking advantage of the community group license that covers occasional users. This is making a huge difference to our bottom line."

**"The SmartSimple Cloud workflow is completely different from any other we've seen or used. We can decide on how it functions rather than needing to change our process to match the limitations of the system."**

**A Foundation Representative**

The Foundation staff also really like the benefits of having unique user portals for everyone accessing the system. "Everyone has their own portal, their own password and they only see what they need to see. This makes the overall interface much more efficient for local approvers."

"I would recommend SmartSimple Cloud to anyone because it's a fully configurable solution. We haven't had to compromise our process to use the platform and they have a culture of helping their clients improve their granting processes. We've benefited greatly from our system, and every enhancement just makes it a better solution." ●

## Leading Health Plan Provider

**How a leading corporate health plan provider streamlines grantmaking process with SmartSimple's Premium Support Services.**

### At a Glance

The client, a large corporate enterprise, was looking for a centralized grants management system that could be used across multiple departments. Due to a negative past experience with another vendor, they also wanted customer service that would provide timely, effective support. By moving to SmartSimple Cloud, each team was given access to the system to manage their programs their way.

And by integrating SmartSimple's Premium Support Services offering, they had strong support behind them for when they needed help. The service gave them access to regular one-on-one discussions with a Dedicated Support Representative, as well as regular meetings with the Customer Experience team leaders. This level of engagement empowered them to make the most of their system by building a deeper understanding of how it worked.

**SmartSimple client since:** 2014

**Dollars granted:** Over \$13 million in 2015

**SmartSimple product/services:**

- [SmartSimple Cloud for Corporate Social Responsibility](#)
- [Premium Support](#)

### Key pain points:

- No reviewer portal
- Lack of post-implementation support
- Too much paper
- No tracking capabilities

### New system must-haves

- Online platform
- Solid support offering
- A one-stop shop for all funding opportunities
- Detailed tracking and reporting

"SmartSimple Cloud provides potential grantees one central location to find all available funds and sponsorships from all three departments."

**A Senior Community Funding Coordinator**



Leading Health Plan Provider is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Corporate Social Responsibility >**

**Request a Demo >**

### About our Client

The client is one of the most recognized health and travel insurance brands in the United States. As one of the largest plan providers in the state of Minnesota, they've improved the lives of Minnesotans for more than 80 years. Not just a provider of health insurance plans and services, they are committed to making a healthy difference in peoples' lives.

### The Challenge

"Customer service is very important to us. Our previous vendor didn't provide the support we needed," says the Senior Community Funding Coordinator. "Response time is critical for us, so any delay in response made it difficult for us to continue our work. Not having a direct contact person to assist us with technical problems exacerbated the issue.

When we were able to arrange assistance, some solutions would be resolved in a day or two while others could take months. There were even some issues that never got resolved." To add more complexity to the organization's challenges, the client required a solution that would enable multiple teams to work in the same, centralized system.

### Moving to SmartSimple

The client moved to SmartSimple Cloud in the summer of 2014. They were impressed that they found a single solution that could fit all their unique needs. "Each area of the organization is different, so we needed a system that would enable us to show all the activities we were supporting collectively. SmartSimple Cloud provides potential grantees one

central location to find all available funds and sponsorship opportunities from every department.”

### The support challenge

When the SmartSimple Cloud implementation team completed their work and transitioned the system to the client, many were surprised at the breadth of capabilities that could be included in one, overarching system.

“We wanted even more training to ensure we understood everything we could do and be ready to take charge of our system.” It was during this time that SmartSimple was working on a pilot project for a new, extended **Premium Support Services** offering.”



### The Solution for Personalized Support

Premium Support Services was created in response to frequent requests from clients looking for an enhanced service option. “Our goal was to create a more individualized support offering for clients with complex configurations, those who don’t have a dedicated internal IT resource or those who regularly reach out to us for hands-on assistance,” says Eric Lauer, Director, Customer Experience at SmartSimple.

“The key benefit that differentiates Premium Support Services from Essential Support is a Dedicated Support Representative assigned to the client, specifically equipped with an in-depth understanding of their unique configuration. This means the client has their own personal support resource they can call for assistance who has the insight into their system that gives them the ability to provide answers and solutions quickly. Premium Support Services also offers regular meeting opportunities with a Customer Experience team leader to address any needs or concerns a client wishes to discuss, from additional training or conversations around strategy to additional changes to evolve the client’s system.”

**“Premium Support Services has definitely exceeded my expectations.”**

**A Senior Community Funding Coordinator**

“We became one of the early adopters of Premium Support Services,” continues the Senior Community Funding Coordinator, “We were very excited to be given the opportunity to try this new service before it was opened to other SmartSimple Cloud clients.”

### Providing Superior Customer Service

“Our Dedicated Support Representative is fantastic. What felt like a huge learning curve was made so much easier. I feel so much more comfortable using our system now. I can always reach out to someone with the expertise I need to guide me.”

“Premium Support Services has definitely exceeded my expectations. I’m the type of person who likes to talk through issues, so having someone on the phone with me while I’m working through a problem helps me to understand exactly what I need to do. Our Dedicated Support Representative is very patient while I take notes during our calls so I have the chance to learn as I go. Now I know I can solve most issues myself with confidence.”

### On Track to Success

“The additional training opportunities that come with Premium Support Services has vastly improved my skills and knowledge of our system’s capabilities. I was putting in about 100 hours a month performing my tasks. Now that I have a greater understanding of how to take advantage of the total system’s functionality, those same tasks are taking just 20 to 50 hours, freeing up days’ worth of time. We’re also seeing more members of our team actively using SmartSimple Cloud since everyone feels much more comfortable working with it.”

“Premium Support Services really made a difference, easing the transition from implementation to support. It’s an efficient process that helps our team accomplish more, faster. Everyone we’ve worked with to get Premium Support Services in place has been highly professional, extremely patient and very responsive. That’s pretty amazing, because of the unique needs of each department. No matter who calls our Dedicated Support Representative, they always get the help they need. We never worry because we always get the right solution.” ●

## Merz North America



**How Merz North America digitized their Grants Management System into a powerful all-in-one solution for every aspect of their workflow.**

### At a Glance

Merz North America, Inc., wanted to create a more efficient, innovative solution to continue building exceptional customer relationships. Their ultimate goal was to create a centralized system that was intuitive to use for all internal and external users. With SmartSimple Cloud, Merz discovered the advantages of an online grant application process and a clear, completely trackable audit trail. Their office is now paper-free, and their approval process is completely automated, improving efficiencies and enabling them to approve and distribute funding more quickly and easily than before.

**SmartSimple client since:** 2015

#### Type of giving:

- Medical Education Grants
- Corporate Charitable Giving
- Commercial Sponsorships and Exhibits
- Investigator-Initiated Research

**Old system:** Excel spreadsheets

#### SmartSimple product/services:

- [SmartSimple Cloud for Corporate Social Responsibility](#)
- [Premium Support](#)

#### Key pain points:

- Paper-based documentation process
- Manual signature
- Payment request processes

#### New system must-haves

- Eco-friendly, paperless process
- Compliance and legal audit readiness
- Online grant application, review, and approval processes

"Sharing our SmartSimple Cloud experience with other Merz departments and affiliates has helped us demonstrate our value and commitment to live our vision to become the most admired, trusted and innovative company for our customers. We've also been able to illustrate how the SmartSimple Cloud might be used in other areas of the organization."

#### Michael Hall

Senior Manager of Grants & Giving, Systems and Analysis



Merz North America is a SmartSimple Cloud user

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### About Merz North America

Founded in 1908, the Merz Pharma Group is a family owned company headquartered in Frankfurt, Germany. Merz North America operations specializes in the development of innovative treatment solutions in aesthetics and neurosciences. Merz North America's granting program administers funding for commercial program support, medical education, corporate charitable giving, and investigator-initiated research.

### Opportunities for the integration of automation

Prior to working with SmartSimple Cloud, Merz North America has explored the possibility of integrating with an automated platform. "We were looking for an innovative solution to grow and develop efficiencies," says Michael Hall, Senior Manager of Grants & Giving, Systems and Analytics. "Manual internal application reviews, check requests and electronic signature capture were areas of opportunity for increased automation."

Merz North America's desire was to continue to improve and positively impact its relationships with scientific, educational and charitable communities. "We wanted to ensure that users of our Grants and Giving portal would experience a simple, easy-to-understand process while submitting their requests. We also wanted to optimize our opportunities for creating a presence as a corporate sponsor for various events."

### A large corporation with unique, complex system requirements

The organization felt it was time to invest in an automated granting system to create efficiencies and bring value to the entire process. "As both a specialty healthcare company and a granting organization, we had some pretty unique requirements for a grants and giving program."

After reviewing several options, SmartSimple Cloud's flexibility, extensive features, and platform flexibility won the Merz team over. "While many others offered very nice out-of-the-box products, none of them had the level of configurability SmartSimple Cloud offered. It was clear this was a platform that would provide value to the team while allowing for future growth."

"The specialty healthcare industry is constantly changing, so having a system where we could easily add features and functionality as we needed was a valuable benefit."

### A specialized team to meet specialized needs

"We kicked off the project by sitting down with our SmartSimple project manager to discuss our needs and what we hoped to accomplish with our system. Based on our needs, SmartSimple created a project plan for us that was personalized, well designed and easy to implement. The implementation team was very responsive to our concerns, questions, and ideas. Anytime we brought up an issue it was addressed quickly and handled professionally."

"The complete automation of Merz North America's grants and giving activities has vastly improved efficiencies for everyone on the team, and created an innovative Grants & Giving portal."

**"It was clear this was a platform that would provide value to the team while allowing for future growth."**

**Michael Hall**

Senior Manager of Grants & Giving, Systems and Analysis

### Seamless integration for improved processing

"We've also successfully used SmartSimple Cloud's integration with an online document signing platform that gives us the ability to send documents via email for electronic signatures. Having online signature capture has been a huge time saver; it's an incredibly valuable integration for us. SmartSimple Cloud has taken an immense administrative burden off of our shoulders."

"The SmartSimple team has been responsive and we enjoy collaborating with them," concludes Michael. "They focus on teamwork and finding workable solutions. We love how the platform can be molded and tweaked to make it even more user-friendly. The Technical Community Support team has been wonderful, always working with us to find an optimal solution, and they always offer options when we present a problem. Others across our organization who have only ever associated our team with granting are now talking about us as a valued partner in the business, helping to create new opportunities for everyone." ●





## National Commercial Bank of Jamaica



**How the National Commercial Bank Of Jamaica digitized and elevated their grants management system in two weeks.**

### At a Glance

The National Commercial Bank of Jamaica (NCB) Foundation was managing their grants programs with a disjointed process. Applications were cobbled together with a combination of manual and digital processing methods and there was no effective way of consolidating all of the applications and data they were gathering. An immediate solution was needed in order to simplify the process and centralize all related activities under one system that could manage it all. Within two weeks, SmartSimple delivered a robust grants management system that provided a solution to NCB's immediate needs all while leaving them with the flexibility to grow and scale their system as their needs became more complex.

**SmartSimple client since:** 2018

**Awards given:** 218

**Old system:** Disparate manual and digital processes

**SmartSimple product/services:**

- [SmartSimple Cloud for Corporate Social Responsibility](#)

### Key pain points:

- An inefficient paper-based system that slowed down the awarding process.

### New system must-haves

- A centralized and digitized system to standardize every step in the reporting process and run evaluations with ease.

"SmartSimple already had the platform with the solutions we needed, and the fact that it could be delivered in two weeks was ideal."

**Melissa Bradford-Britton**  
Operations Manager of NCB



National Commercial Bank of Jamaica is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Corporate Social Responsibility >**

**Request a Demo >**

### About The National Commercial Bank of Jamaica Foundation

The NCB Foundation was formalized in 2003 as the philanthropic arm of the country's largest home-grown bank. Their primary areas of focus are education, entrepreneurship, youth leadership, and community development. Since the creation of the foundation, they've provided opportunities that help future generations who can lead wisely and participate in a meaningful way to Jamaica's development.

NCB accepted applications through a number of different sources ranging from PDF forms, emails, and survey software. This mixed bag of processes didn't create a coherent and streamlined workflow. "Consistent details were difficult to obtain," says Melissa Bradford-Britton, Operations Manager of NCB. They wanted to create a more efficient process that allowed them to spend less administrative time tracking down the correct information from applicants and more time to developing strategies for funding impact. "We wanted to make our process more digital. What we were doing wasn't working and we wanted something better."

### The search for a better system

After exploring five other software solutions they found SmartSimple Cloud to be the best fit for their needs. "SmartSimple already had the platform with the solutions we needed, and the fact that it could be delivered in two weeks was ideal," says Bradford-Britton.

### Fast delivery with a better solution

From the initial meetings between SmartSimple and NCB to the delivery of a platform catered to their needs, SmartSimple provided a solution in very little time. "In two weeks, we got our system and we were able to consolidate

all our data into one place,” says Bradford-Britton. When describing NCB’s experience transitioning to using the new system, Melissa continued by saying “it was great working with the implementation team. When we needed changes, SmartSimple immediately made them and delivered on all the time timelines...Now we have clear cost, proof, and documentation for auditing purposes.”

### Everything needed all in one place

Since working with their new system, NCB has saved valuable administration time because of a more efficient process via SmartSimple Cloud, “we are able to ask people to enter their own forms in themselves in the one system where we can capture all the information internally,” says Bradford-Britton. “We’re able to lead everyone to their online portal and capture data more easily.”



**“In two weeks, we got our system and we were able to consolidate all our data into one place.”**

**Melissa Bradford-Britton**

Operations Manager of NCB

No matter how you break it down: 14 days, 336 hours, 20160 minutes or 2 weeks, NCB found a better solution that drastically improved their CSR operations in very little time with SmartSimple Direct. “We can now assess and approve all applications through one system,” says Bradford-Britton.

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 Cloud to enrich their impact story and create greater efficiencies in their granting processes. ●

## City of London, Ontario



**How the City of London, Ontario built a grants management platform that evolved with their growing needs.**

### At a Glance

The City of London had a completely paper-based system to manage their granting activities. All signatures had to be physically collected and were only accepted on original, printed documents. Every application had to travel between the applicant, reviewers, and the city's granting office, making it difficult to properly track and organize them.

Because of all the back and forth, grant reports took a great deal of time to complete. Reports were shared as blank templates which meant they were often submitted without all the required information. Once the city implemented SmartSimple Cloud, everything was organized and centralized online. They saved hours of time in processing applications, building reports and tracking all aspects of their granting program.

"SmartSimple Cloud is making our work supporting organizations so much easier. We have eliminated many of the time-consuming aspects of our old program and can now focus on other priorities. Our team has more time to support and empower our grantees, helping to build the capacity of the organizations the city funds."

**Jen Carter**

Manager, Policy and Strategic Issues



City of London, Ontario is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**

**SmartSimple client since:** 2015

**Type of giving:** Grants

**Dollars managed:** \$1.8 million annually

**Old system:** Microsoft Office, paper

**SmartSimple product/services:**

- [SmartSimple Cloud for Government Funding](#)

### Key pain points:

- Too much paper
- No centralized document storage
- No online document signing capabilities
- Reports extremely time-consuming to complete

### New system must-haves:

- Cost effective
- Online application and tracking
- Intuitive to use
- Able to evolve
- Strong security features

### About the City of London

London is a Canadian city located in Southwestern Ontario. With a population of over 380,000, the city boasts a vibrant art scene as well as several historically significant sites and museums. London is home to one of Canada's largest universities, the University of Western Ontario, and one of Canada's largest colleges, Fanshawe College. Their granting activities align with the city's strategic plan, and work to advance the priorities of Strengthening our Community, Building a Sustainable City, and Growing our Economy. The city funds a number of different organizations from large non-profits to smaller, grassroots organizations.

### Drowning in spreadsheets, contracts, and photocopies

The City of London's manual, paper-based system was in desperate need of an overhaul. "With all the grants being on paper, nothing was, or even could be, automated. Staff were using an Excel spreadsheet to try and administer grants, track awards, and maintain reporting data," said Jen Carter, Manager, Policy and Strategic Issues.

"There were reams of paper going back and forth between us, our finance department, our grantees and reviewers. The system also involved stacks of contracts that needed original signatures, which then had to be filed. But the biggest pain for us was reporting. Reporting is a very important part of our granting process, and we need to be accountable for how public dollars are being spent. Our team worked very closely with organizations to assist in completing reports, but with



a paper-based system, this took several rounds of edits.”

“We had a large volume of photocopied documents - mostly applications - that we would add handwritten notes to. At times it was difficult to tell if those notes had been incorporated into the most recent versions of our documents. Applications submitted to the city were frequently missing information which involved a lot of back and forth to gather missing data.”

Through their strategic plan, London’s city council directed the municipal granting team to modernize the process so that they could better support local organizations and residents. One way was by providing a simple, online application and tracking system that everyone could use.

### Seeking a community-friendly solution

When conducting a comprehensive review of other technologies, they were looking for a “perfect fit” to keep up with the unique way their operations were running. They chose SmartSimple Cloud as their flexible solution to track and report the complex funding and disbursement structures. “Other systems didn’t allow for the flexibility that SmartSimple Cloud did.”

The city had considered a Microsoft-based CRM, but it would have cost upwards of \$300,000, an amount significantly higher than what was budgeted. “Because we are using public funds for important investments to enhance our community, it’s critical for us to be accountable for every dollar we spend.”

“The City of London’s grant applications also have to be intuitive, so it was important to build a system accessible to all levels of computer competency so anyone could apply for funding with minimal assistance from us. We have a variety of different groups using the system, including older adults applying for small neighborhood improvement grants, environmental groups looking to beautify the city by planting trees, and large, established organizations with a strong aptitude for completing grant applications.”

**“Through our research, we discovered that SmartSimple Cloud was the perfect solution. They provide a cost-effective platform with the ability to be configured based on our business process, as well as the ability to adapt to our business needs for the future.”**

**Jen Carter**

Manager, Policy and Strategic Issues

“Among our other requirements was ensuring we implemented a system that was highly adaptable; able to change as the priorities of the city do. We needed a solution that could easily grow and work for the city over the long term. And, as a municipal government department, it’s extremely important that we adhere to very high security protocols. Jen did some online research and discovered the Idealware Consumers Guide to Grants Management Systems. “It was a great resource to begin our search for a grant management system, and helped us identify the right vendor for an online system to suit us.”

“Through our research, we discovered that SmartSimple Cloud was the perfect solution. They provide a cost-effective platform with the ability to be configured based on our business process, as well as the ability to adapt to our business needs for the future.”

“SmartSimple Cloud offered a nearly endless range of configurable features and functionality. It was exactly what we were looking for to make our grant process more efficient, and move entirely online.”

### An adaptable future for the city’s granting process

Having never been through a major system implementation before, Jen was appreciative of the guidance and support provided by the SmartSimple team. “The implementation process gave us the perfect opportunity to reevaluate how we managed our granting program from every angle. We were entirely open to new ideas and to be challenged about our current process in order to develop a system that would be both efficient and effective. Our SmartSimple

implementation team was able to adapt and adjust to all the parts of our granting process, making the program much easier to manage.”

“SmartSimple Cloud is making our work supporting organizations so much easier. We have eliminated many of the time-consuming aspects of our old process, and can now focus on other priorities. Our team finally has time to support and empower our grantees, building the capacity of the organizations the city funds.”

“We’re very happy that we chose SmartSimple Cloud for our grants management system. We really appreciate the ongoing, open dialogue between SmartSimple and their clients to evolve the platform; they use our feedback to continually improve the system and make certain it is reflective of the needs of their clients. SmartSimple actually takes our suggestions into consideration, which is reflected in new features that are added through quarterly upgrades. SmartSimple Cloud truly empowers me to use and configure new functionality on my own; that means, technically, I can build new pieces of our system on my own.”

**“SmartSimple Cloud truly empowers me to use and configure new functionality on my own; that means, technically, I can build new pieces of our system on my own.”**

**Jen Carter**

Manager, Policy and Strategic Issues

### A time-saving solution to grow with

These substantial process improvements ensure the city’s reports are now automatically sent to organizations complete with past due reminder emails. “Organizations submit their reports to their board members for approval through SmartSimple Cloud, and we’ve eliminated the need for physical signatures. With the ability to create workflows to automatically send out reports to grantees, reporting is already set up to be entirely managed through the system for the next 3 years.”

Jen has been so thrilled with their SmartSimple Cloud platform that she has recommended SmartSimple Cloud to other municipalities as well as other departments at London City Hall.

“The City of London will be bringing more departments online with SmartSimple Cloud. With the range of highly private and personal information that other departments manage, they quickly saw how SmartSimple Cloud would align with their security requirements and provide a cost-effective solution that supports city staff to better serve our community.”

“SmartSimple is invested in supporting us to meet our growing business needs; not just the needs of my team, but for all the residents of London. With the ability to constantly enhance our system and adapt to change, SmartSimple Cloud will be a valuable partner for years to come.” ●





## Enterprise Ireland



**How Enterprise Ireland created a more efficient grants application process through a digitized platform with robust reporting capabilities.**

### At a Glance

Enterprise Ireland's Commercialisation Fund Programme grants manual processes were cumbersome, taking a heavy toll on their staff. "We really needed to find a way to streamline and improve the audit trail," says Majella Maher, Programme Manager for Enterprise Ireland. "Plus, the research space has changed, with more and more researchers working online to submit grant applications and scientific papers for publication." Recommendations from other Irish organizations, and a strong track record in the United States helped guide their decision to choose SmartSimple Cloud.

**SmartSimple client since:** 2012

**Type of giving:** Grants

**Old system:** Manual

**SmartSimple product/services:**

- [SmartSimple Cloud for Government Funding](#)

### Key pain points:

- An out-of-date, paper-based grants management system requiring a too many hours of administrative support

### New system must-haves:

- A fully-digitized and efficient grants management process
- Robust track and reporting capabilities

"Other funding agencies in Ireland spoke highly of their own SmartSimple Cloud platforms."

**Majella Maher**

Programme Manager



Enterprise Ireland is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**

### About Enterprise Ireland

Enterprise Ireland is the government organization responsible for growing and developing Irish companies. The aim of the Commercialisation Fund Programme is to improve the competitiveness of the Irish economy. We invest in innovative scientific research at Irish universities and research performing organizations to develop new products and services, leading to the creation of technology-based start-up companies and the transfer of innovations to industry in Ireland.

### The Challenge

The Commercialisation Fund Programme grants manual processes were cumbersome, taking a heavy toll on their staff. "We really needed to find a way to streamline and improve the audit trail," says Majella Maher, Programme Manager for Enterprise Ireland. "Plus, the research space has changed, with more and more researchers working online to submit grant applications and scientific papers for publication."

### Selecting SmartSimple

Recommendations from other Irish organizations, and a strong track record in the United States helped guide their decision to choose SmartSimple Cloud. "Other funding agencies in Ireland spoke highly of their own SmartSimple Cloud platforms. Their large client base, particularly in the United States, also made it clear that they had the capabilities to handle our needs."

Once Enterprise Ireland met with the SmartSimple team, they were sold: "The people were competent and confident they had the expertise to create the kind of system we were looking for."

### Working with SmartSimple

At the start, Majella and her team put a high value on regular, face-to-face meetings with SmartSimple's Dublin office. "It was important to build the relationship and a common understanding of our system needs. Once we got to know the people and the process, we were able to comfortably transition to virtual meetings."

"A high level of configuration and innovation was needed to create the online system for Enterprise Ireland. The SmartSimple team was open, responsive and willing to adjust and change specifications to ensure we had what we needed. Overall, it was clear they wanted to work with us to find a good solution everyone was happy with. We also appreciate ongoing regular support meetings with Business Support Analyst Ciaran Arshad, as we continue to refine our system."

Enterprise Ireland has experienced improved efficiency since moving online and into the cloud. "Not having to print off reams of paper has greatly reduced the amount of administrative support required to manage our grants. Having one central system has made work much less labor intensive for everyone. The system provides a better audit trail, eliminating the need to go into multiple systems to find all the details we're looking for."

**"Having one central [grants management] system for our Commercialisation Fund Programme makes work much less labor-intensive for everyone; no need to go into multiple systems to find and collate the information we're looking for."**

**Majella Maher**  
Programme Manager

External users have also complimented Enterprise Ireland's online SmartSimple CLOUD for Government Funding platform, "Feedback from our users has been highly favorable. For applicants, the application forms are organized so they are easy to work through and complete. For reviewers, applications are organized to logically present information – rather than needing to flip back and forth between sections looking for relevant details – making it easier to evaluate each submission."



"Since the system also keeps track of where applications are in the process and what actions are completed, I can go in at any time and see exactly what stage any given application is at. I can see who has done their review and how the application is rated so far. Previously, I would have had to go in and out of multiple files to find out what stage an application was at. Now, I get a complete picture in one central location."

"SmartSimple Cloud offers many advantages over a manual system, and everyone has found it quite easy to use. The SmartSimple Dublin team is great. It's clear that pleasing the client is their main priority and they're always open-minded and willing to listen to what we need." ●

## Fish & Wildlife Compensation Program



**How FWCP digitized their grants management data into one centralized, paperless platform all within 9 months.**

### At a Glance

The Fish & Wildlife Compensation Program (a partnership between BC Hydro, the Province of BC, Fisheries and Oceans Canada, First Nations and public stakeholders) had been struggling with managing a growing number of applications with their old, manual process that consisted of emailing, using spreadsheets, Word documents and even filing away physical folders.

Turning to SmartSimple Cloud to automate these processes, SmartSimple was able to deliver a fully configured system within FWCP's 6 to 9 month timeframe. With a new system in place, nearly all of FWCP's process pain points have been eliminated.

#### SmartSimple client since: 2015

**Dollars granted:** >Approx. \$8.9 million in 2016/2017

**Old system:** Manual process that used email, word documents, file folders and spreadsheets

#### SmartSimple product/services:

- [SmartSimple Cloud for Government Funding](#)
- [Premium Support](#)

#### Key pain points:

- Excessive amount of printing
- Large amount of manual work in the process
- No automation

#### New system must-haves:

- High level of security
- Fully automated with the ability to print as required
- Canadian company
- Demonstrable ROI

"The time we've saved since implementing our system has been huge. Binders that took dozens of hours to create can now be produced in 30 seconds. We know exactly where each reviewer is with their assigned tasks and can quickly create and send reminders; no more guessing if everyone is on schedule or not; we can truly monitor the entire review process from start to finish."

#### Marc Nielsen

Project Manager and Business Analyst Test Lead



Fish & Wildlife Compensation Program is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**

### About the Fish & Wildlife Compensation Program

BC Hydro is a provincial crown corporation owned by the government and people of the Province of British Columbia. They operate 31 hydroelectric facilities and two thermal generating plants that deliver power through a network of more than 48,000 miles of transmission and distribution lines.

BC Hydro funds the Fish & Wildlife Compensation Program (FWCP), whose mandate is to conserve and enhance fish and wildlife that have been impacted by BC Hydro dams.

### Finding a way to eliminate manual processes

FWCP had two immediate problem areas they wanted to address: first, they wanted to improve how the review process was managed for grant applications and second, they wanted to find a better, more efficient way to communicate with grant applicants. Before switching to SmartSimple Cloud, the Program had been using a mix of emails, word documents, physical file folders and spreadsheets to manage these activities.

"Applicants would email applications to us, the administrative team would manually record them on a spreadsheet, and then we would print and ship binders to between 10 and 20 reviewers."

"Over a period of a few short years, the number of grant applications was increasing rapidly. We were spending a great deal on supplies and resources to accomplish our work."

"We definitely needed a new process, one that we could automate but would still support any paper-based

requirements as needed to accommodate our review panels.”

### Selecting SmartSimple

Marc and the FWCP team did an extensive amount of research before deciding on SmartSimple. They needed a supplier that could demonstrate a clear ROI while being able to deliver on a very demanding schedule. “We needed someone who could provide obvious value for dollar, and deliver a finished system within a 6 to 9 month timeframe. It was critical for us to be able to use our new platform for our fiscal 2017 grant cycle, or we’d be stuck using our old, manual system for another full year,” adds Marc.



“It was clear to us from the first demonstration that SmartSimple Cloud for Government Funding was the only vendor solution that could meet all of our requirements and deliver on time within our price range. Several other vendors were close, but they were either more costly, could not meet our privacy standards or other key business requirements. SmartSimple Cloud for Government Funding was the one solution that could do everything we needed, and more.”

### Working with SmartSimple

“The SmartSimple team was extremely attentive and met our demanding deadlines. They were a true partner during our implementation. And the support team has been just outstanding, answering our questions quickly while giving us the information we need to develop our own internal skills. I’ve actually been able to configure new grant types myself.”

Since moving to SmartSimple Cloud, the FWCP team has been able to eliminate most of the old process pain points. “The time we’ve saved since launching our system has been huge. We know exactly where each reviewer is with their assigned tasks and can quickly create and send reminders; no more guessing if everyone is on schedule or not; we can truly monitor the entire review process from start to finish.”

**“We definitely needed a new process, one that we could automate but would still support any paperbased requirements as needed to accommodate our review panels.”**

**Marc Nielsen**

Project Manager and Business Analyst Test Lead

“The ability to use digital signatures, being able to produce PDFs of our applications and online reviewing options have greatly reduced the complexity of collecting review scores and summaries. Reports can be created and exported with next to no effort,” continues Marc.

On top of eliminating hours of repetitive work printing, scanning and photocopying, FWCP has already saved over \$50,000 in resources and the saving will continue each year. They even surveyed applicants, and more than 75% said they found their overall experience using SmartSimple Cloud was either very good or excellent. “If we suddenly had to go back to our former process, it would be a huge let down for our supporters; our reviewers would be highly disappointed and our administrative staff would be disheartened.” ●

## Ontario Centres of Excellence



**How the Ontario Centres of Excellence scaled their grants management system to limitless heights.**

### At a Glance

Ontario Centres of Excellence (OCE) was challenged not only with the high volume of incoming grant applications but effectively managing the diverse needs and requirements associated with each application. Their data was scattered across different software and platforms, which caused delays in their administrative and application review processes. SmartSimple delivered them a cohesive system that integrated all functionality they needed into one, centralized platform to simplify their workflows. This enabled OCE to efficiently manage their processes on a large scale.

"The demand is always high for grants, but one metric that stands out since moving to SmartSimple Cloud is an increase in user satisfaction."

**Farzad Zohouri**

Director, Information Systems



Ontario Centres of Excellence is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**



### About Ontario Centres of Excellence

Ontario Centres of Excellence (OCE) focuses on ensuring the people of Ontario reap the personal and economic benefits of leading-edge research underway in the province's publicly funded universities, colleges and research hospitals - research that can be transformed into technologies and services that enhance the quality of life and help build a globally competitive, job-creating economy in Ontario.

OCE deploys an experienced team of Business Development Managers across the province to help build industry-academic collaborations and support the launch and growth of businesses. They identify what is needed in different industries by exploring the halls and labs of academia to discover the latest breakthroughs from researchers. OCE then guides industry-academic partners in accessing tailored programs that provide the support and expertise required to commercialize innovations, transfer technologies, and develop promising talent.

### Searching for a home for all the data

OCE has different programs that work with startups as well as large enterprises, receiving 2,000 applications every year. Each applicant applies for various funds based on the criteria of eligibility. The initial workflow was the same across each program, but based on the nature of the program, different applications required different elements — for example, programs for social engagement and programs for technology advancement will need different granting needs. OCE's challenge was too many processes surrounding each of the granting requirements.

To accommodate its large-scale application process, OCE used a number of different tools in separate systems. They had a CRM software for contact management, yet had to send data back and forth to their financial software. They then had another tool for document e-signatures while using Zendesk to manage support tickets. "We wanted a centralized place to handle all feedback and requests," says Farzad Zohouri, Director, Information Systems at Ontario Centres of Excellence. SmartSimple managed to create seamless integrations housed in one system. From CRM tools, grant management, reporting, to payments, OCE's platform handled every nuanced application process from start to finish, no matter how complex.



### One cohesive system for multiple processes

OCE now has one shared system to manage the flow of every program and can make any changes with more ease. From the information collected at the start of the application to the reporting process at the close-out, OCE has simplified workflows to move the application from stage to stage faster and more efficiently. OCE's process for making system changes, which involve nine Program Managers, is much more manageable and coordinated because everyone is using one centralized system. "We're able to come up with a common solution and implement the solution more easily," says Zohouri.



To ensure they create a system that's relevant to the needs of their applicants, OCE can send a feedback survey to those who have received funding from their system. "Feedback is critical for our process of bettering our programs and making it easier to use while ensuring it provides the necessary reporting functionality to our stakeholders," says Zohouri. After sending the survey, OCE's internal staff can now take feedback from their integrated support system (Zendesk) and input it directly into their implementation process.

**"We've managed to receive 3,000 reviews on time, and without the SmartSimple system, we couldn't handle the processing of our grants."**

**Farzad Zohouri**

Director, Information Systems

### A stress-free applicant experience

"The demand is always high for grants, but one metric that stands out since moved to SmartSimple Cloud is an increase in overall user satisfaction." By having an efficient administrative process, OCE can deliver results to their applicants and meet expectations in a clear timeline. Depending on the client and the application information they need, OCE takes up to three weeks for each external application review. Workflows are set up where alerts notify reviewers when they're close to the deadline to keep all parties accountable.

"Application reviewers are happier now since they have all the info they need in one place," says Zohouri. OCE designed a standard base review form for ease and can communicate any issues and concerns as they arise in real-time. "We've managed to receive 3,000 reviews on time, and without the SmartSimple Cloud platform, we couldn't handle the processing of our grants," adds Zohouri.

### A platform on the grow

"We're always looking to enhance what we have," says Zohouri. One feature OCE wants to work on is enabling reviewers to be able to push a button to add the calendar review timeline directly into their calendar. "We're always thinking and looking through the perspective of the applicant and building our system from there, and while we have a close knowledge of our system, there's always room to grow," concludes Zohouri. ●

## Ontario Trillium Foundation



**How one of Canada's largest grantmakers became the first foundation to invest in outcomes and deliver on the promise of bias-free assessments.**

### At a Glance

The Ontario Trillium Foundation (OTF) is one of the world's ten largest foundations by annual grantmaking. After 30 years of helping build healthy communities as an Agency of the Government of Ontario, OTF made the courageous decision to embark on a journey of innovation that would see the transformation of their strategy, people, process, and technology. They emerged as one of the most evidence-based, digitally efficient and outcomes-effective grantmaking organizations. As a result of a significant organization-wide change effort enabled by SmartSimple Cloud technology, Ontarians were assured that the granting model was fair and transparent. OTF's entire granting and reporting process became completely paperless by the time the system went live and the organization transformed all of its processes to create more long-lasting funding impact in their community investments.

**SmartSimple client since:** 2015

**Type of giving:** Grants

**Current platform:** SmartSimple Cloud

**Previous platform:** Custom-built

**SmartSimple product/services:**

- [SmartSimple Cloud for Government Funding](#)

### Key challenges:

- Previous grants management system couldn't accommodate new strategy and vision for the organization
- Finding technology that would enable a new outcomes-based model, virtual workforce and volunteers and increase objectivity in decision-making

### New system must-haves:

- A cloud-based grantmaking solution to efficiently manage their programs
- Capture and measure outcomes on the impact of investments
- Implement a bias-free assessment process for local volunteers and staff
- Centralized, convenient access to information by staff, board and local volunteers

"Since everything on SmartSimple Cloud is in the cloud, no one missed a beat. We have staff and volunteers assessing grants across the province, so our system was built knowing assessors would not be located in the same place. During COVID-19, it has allowed us to easily offer flexibility to staff and grantees."

**Beth Puddicombe**

Vice President of Community Investments and Project Lead



Ontario Trillium Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**

### About the Ontario Trillium Foundation

The Ontario Trillium Foundation (OTF) is a Government of Ontario agency and one of Canada's largest grantmakers, having awarded \$115 million in grants to 645 projects in 2019 to help build healthy and vibrant Ontario communities. The Foundation's investments are driven by Priority Outcomes within six Action Areas, based on 12 of the indicators used by the Canada Index of Wellbeing (CIW) for measuring changes in the wellbeing of Canadians.

Every year, over 3,000 grant applications are reviewed by hundreds of volunteers who each bring deep knowledge of local needs and a wide range of expertise to the decision-making process. OTF invests in a broad range of community projects across Canada's most-populous province, from bird sanctuaries to local skateboard parks and theatre groups. Since 2014, OTF has continued its decade-long commitment to investing \$1 billion for creating healthier communities across the province of Ontario.

### Transforming to a more objective grantmaking strategy

OTF was tasked with advancing their grants management system in order to reflect the multi-faceted nature of their evolving giving efforts. Beth Puddicombe, Vice President of Community Investments had this to say of the undertaking: “How we were funding was working, but as we went through the processes, we became aware of a lot of opportunities to enhance transparency and build more effective and efficient processes. In reviewing the state of the grants management field, we knew we needed a different solution than what we had been using.



OTF was an early adopter of an online grants management system, long before the space developed into what it is today. “We decided to work with SmartSimple’s cloud-based platform for our grants management technology needs and implemented the system to our new outcomes driven process with Gen3,” says Blair Dimock, Vice President of Partnerships and Measurement. He continued, “We were tasked with making two critical changes in our granting: the ability to have an objective and bias-free assessment model and process; and improve the quality of the evidence that our board could be able to use for decision-making.”

### A more strategic approach towards measuring outcomes

In their revamped approach to investing in communities, OTF focused on not only which nonprofits they funded, but how they funded them and what they funded them for. As such, they were able to better define community problems and measure solutions. In OTF’s new investment model, funding is assessed through six Action Areas, based on 12 of the indicators used by the CIW. These Action Areas are addressed by supporting different kinds of projects being undertaken by the right nonprofits who are experts in the field in which the projects are identified and funded. However, OTF’s internal processes did not yet support this new model and needed to evolve in order to stay in line with these new practices. This was especially important so that the Foundation could more effectively measure their funding outcomes. Blair defined OTF’s mission by saying, “We needed to have more action and less talk to enable the provincial government to see the real impacts our grants were having.”

**“We designed our grantmaking system and strategy to be as simple and easy to work with as possible without administrative burden, standards we continue to measure our performance against as a funder.”**

**Blair Dimock**

Vice President of Partnerships and Measurement

Along with capturing more objective quantitative data from their applicants, they needed to then transform the numbers into a clear story on the impact they’re helping to move the needle on. “We needed to pull together a compelling story from all the data, and design the granting opportunities around that,” says Beth. With a vision in mind for their new system, OTF had two key strategic goals in mind: 1) To develop a grantmaking system with a stronger capacity to track where the funding was going, and 2) To evoke a clearer picture of how people’s lives were truly being impacted by OTF grants, through the stories they could now pull from their tracked outcomes data. “By knowing what we wanted to do, it started to put meat on the bones and helped us figure out what changes we wanted to see, how we would achieve those changes, and to design all these data collection pieces,” says Beth. To achieve these key goals, OTF transitioned to a model with distinct funding streams: “Capital”, “Seed”, “Grow”, and “Collective Impact.” This model allowed OTF to ensure that objective comparisons could be made between grants of similar size and purpose, and made it possible to gather more dynamic data on how its funding was distributed. This in turn, allowed them to develop more long-lasting funding.

The task to map out a cloud-based platform to meet the foundation’s complex needs and ambitious goals was no small feat. Gen3 delivered a purpose-built grants management system using SmartSimple Cloud technology that equipped the foundation to streamline outcomes measurement and bolster a stronger business intelligence strategy. Using this platform allowed them to effectively and efficiently align their funding and partnerships with their mission. With a solid data model and two solid Business Intelligence and Knowledge Management strategies, their solution powered by SmartSimple Cloud was uniquely architected so that data collection was embedded into their system’s processes.

### Executing on a new strategy through technology

To effectively track and measure all of their giving efforts while still building a final strategy, OTF needed technology that could enable them to continuously adapt to a then still evolving strategy. This required different layers of planning. “We needed to needle down on the variance of change data collection pieces, starting from a high level and going down and down,” says Beth. “Working closely with Gen3, they configured SmartSimple Cloud to start with the data collection source of research and narrowed it down to six Action Areas that addressed community health. Within each action area, they strategized priority granting outcomes.”

This was a very ambitious strategic undertaking, and by using their system powered by SmartSimple Cloud, OTF developed and adopted a set of standardized survey tools, including “a standard menu of actions and measurement models to address each of these action areas,” says Blair. “We designed our grantmaking system and strategy to be as simple and easy to work with as possible without administrative burden, standards we continue to measure our performance against as a funder.”

“Working closely with Gen3, they configured SmartSimple Cloud platform to start with the data collection source of research and narrowed it down to six Action Areas that addressed community health. Within each action area, they strategized priority granting outcomes.”

**Beth Puddicombe**

Vice President of Community Investments and Project Lead

### A successful launch

Change is hard, no matter how much better a new model might be. It can often still take time for all stakeholders to understand it and adapt to it. “We were able to get everyone on board much quicker by telling people why we were changing our model and we were easily able to do that with our comprehensive system,” says Beth. This was a chance for all OTF’s staff to move focus away from who was processing the grants to what the actual outcomes were. “Our process design was focused on the embedded data model that allows us to capture and support our reporting activities and other work processes to become more data-driven and evidence informed,” says Blair. By having a clear strategy and design for a solution for supporting it in place, user adoption and change management was much more streamlined, and their stakeholders could better understand the new model’s mission and application.

### A future-proof platform to weather unknowns

COVID-19 threw a wrench in everything, and the world now operates much more differently than any industry could have anticipated. However, with a cloud-based system set up to be accessible and managed remotely, OTF was able to respond to the unprecedented situation without disruption. “Since everything on SmartSimple Cloud is in the cloud, no one missed a beat. We have staff across the province, so our system was built knowing assessors would not be located in the same place. During COVID-19, it has allowed us to easily offer flexibility to staff and grantees,” says Beth. “Our work with Gen3 and SmartSimple, along with having everything in the cloud, has been a huge asset,” continues Blair.



### Ready for whatever comes next

With a strong strategy in place, and a clear method of data collection and outcomes measurement, OTF is able to now fund organizations even more effectively. They have made their vision of a more streamlined and objective grantmaking process and their mission of better tracking funding outcomes come to fruition, despite a year full of unprecedented challenges. Now with their eyes to the future, they’re looking to make their system even better. “We’re always trying to find efficiencies and, [with] digitization in mind, that includes working on our website where all interested parties can find information about OTF funding and start an application on it,” says Beth. “Now with the

ability to pivot and make changes as we need to, we’re better equipped today to handle a situation like COVID-19 and adapt to any changes that come our way,” says Blair. ●

## Pennsylvania IOLTA Board



**How the Pennsylvania IOLTA Board built a robust client service and financial reporting system.**

### At a Glance

For their lean staff size, the Pennsylvania Interest on Lawyers' Trust Accounts Board (PA IOLTA Board) conducts complex and detailed reviews of their grantee organizations. In order to ease the administrative burden on staff, the PA IOLTA Board sought to automate their granting process with an online grant management software.

SmartSimple delivered a robust and intuitive system specifically tailored to their unique reporting requirements. Now, their staff has more time to devote to substantive issues surrounding their grantmaking.

#### SmartSimple client since: 2018

**Type of giving:** Grants that support the provision of civil legal aid in Pennsylvania

**Dollars Awarded:** Nearly \$28M (\$5M managed through SmartSimple Cloud)

**Old system:** Manual process

#### SmartSimple product/services:

- [SmartSimple Cloud for Government Funding](#)

#### Key challenges:

- A disconnected reporting process through Excel spreadsheets, Word documents, and emails.

#### New system must-haves:

- A centralized system with robust client services and financial reporting capabilities.

"We've only used a small portion of what was built out in SmartSimple, Cloud and the platform has exceeded my expectations."

**Jim Swoyer**

Grants Manager



Pennsylvania IOLTA Board is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**

### About the Pennsylvania IOLTA Board

The PA IOLTA Board is a nonprofit organization operating under the jurisdiction of the Supreme Court of Pennsylvania. The PA IOLTA Board carries out its mission to financially support the delivery of civil legal aid to low-income and disadvantaged Pennsylvanians through the careful administration of various revenue sources, both court-directed and legislatively-directed.

Upon approval of the Supreme Court of Pennsylvania, the PA IOLTA Board makes grants annually to qualified legal aid organizations across the state, Pennsylvania's nine law school clinical and externship programs, and administration of justice projects — all of which provide legal assistance to low-income individuals and families facing a civil legal crisis where basic human needs, such as shelter, food, medicine and safety, are at stake.

This year, the PA IOLTA Board awarded nearly \$28 million to 35 legal service organizations and 9 law schools. Since the inception of the IOLTA Program in Pennsylvania, more than \$295 million has been awarded in grants.

### Too many programs, not enough time

While the PA IOLTA Board is one of the larger IOLTA programs in the United States in terms of the funds it administers, it has a small staff of six people that work in-house. Limited resources meant that every part of the granting process needed to be as efficient as possible, yet they were working with scattered tools. "We were using an online grants management system that we discontinued and went onto Word, Excel, and email which felt like everything was on paper," says Jim Swoyer, Grants Manager for PA IOLTA.

The majority of the PA IOLTA Board's grants are disbursed quarterly, and after the grantees report on their expenditures and delivery of services, another quarterly payment is issued. These detailed, recurring reviews ensure accountability



for the efficient use of limited public funds. In the previous fiscal year, the PA IOLTA Board received and reviewed 281 Grantee Performance Reports.

"It was time consuming to prepare the report forms each quarter," says Brianna Bosak, Assistant Grants Manager for the PA IOLTA Board. Once the compliance reports were created, staff still faced the administrative burden of having to distribute the reports by way of email. They needed one centralized system for both grantees and staff to input and manage real-time data.

### Forming a cohesive granting process

The PA IOLTA Board knew what they needed from their system from the start. Handling the search internally, they thoroughly researched and evaluated nine different vendors over the course of three months. They also contacted other IOLTA programs and consulted Idealware's Consumer Report on Grants Management. Eventually, the PA IOLTA Board narrowed their search to two software systems that could support their complex compliance reports. "We couldn't find a lot of vendors that could show Year-to-Date views, which is an important part of evaluating the relationship between the services provided and the money spent to provide those services," says Brianna.

In addition to their robust reporting requirements, they needed a portal that their grantees could sign into from anywhere to access their quarterly compliance reports. They also wanted the ability to collect integrated post-award grantee information from the reports and also to administer other grant related functions, like the creation of the contracts, all in one place. "Ultimately, we wanted to sync our reporting and operational processes together and also to automate as many of our processes as possible," says Brianna. The only system that accommodated their needs was SmartSimple Cloud.

**"Managing the process through SmartSimple has saved us a lot of administration time this year."**

**Jim Swoyer**  
Grants Manager

### Manual data entry becoming a thing of the past

The intensive implementation process took three months in total. "SmartSimple's Development team was receptive to feedback and worked on solutions that worked with our processes," says Brianna. Once the system was set in place, their intuitive centralized process was immediately adopted by their grantees. "We didn't get a single complaint with the application process after implementation," says Jim.

Through their new system, the PA IOLTA Board was able to dimension their grant agreements and distribute the contract through the system. "Managing the process through SmartSimple Cloud has saved us a lot of administration time this year," says Jim.

Having all of the data automatically entered into the system has also drastically cut down on administrative time spent. "We have significantly reduced the amount of data we need to manually collate," says Jim. The internal reporting mechanisms within SmartSimple Cloud is another function the PA IOLTA Board enjoys about the system. "I like being able to pull data quickly and reliably," says Brianna. This has enabled staff to devote more time to substantive issues surrounding the PA IOLTA Board's grantmaking.



### Manual data entry becoming a thing of the past

The PA IOLTA Board is already working on more ways to tailor their processes to be even more efficient. "We're currently working on enhancements to our system that will make the application process less burdensome for staff members and grant applicants alike," says Brianna.

With the high configurability and flexibility of the SmartSimple Cloud platform, it can quickly scale to the growth and future needs of the PA IOLTA Board. "We've only used a small portion of what was built out in SmartSimple, and the platform has exceeded my expectations," says Jim. ●

## Washington Traffic Safety Commission



**How the Washington Traffic Safety Commission modernized their system to save lives and administrative time.**

### At a Glance

A sluggish paper-based system hampered the Washington Traffic Safety Commission's nuanced and complex government-funded granting process. With all the detail work required to manage federally funded grants, they wanted to move to an electronic-based system.

SmartSimple Cloud helped them centralize their process into one platform enabling them to invoice, manage projects, and track program impact in an all-in-one platform.

"We selected SmartSimple Cloud because of how configurable it was, and the price points were right."

**Debi Besser**

Program Manager



Washington Traffic Safety Commission is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Government Funding >**

**Request a Demo >**

**SmartSimple client since:** 2017

**Type of giving:** Grants

**Old system:** Paper-based system with Excel spreadsheets and Word documents

**SmartSimple product/services:**

- [SmartSimple Cloud for Government Funding](#)

### Key pain points:

- Too cumbersome of a process handling papers back and forth between staff resulting in loss of information.

### New system must-haves:

- A centralized system to cut down on administrative time with invoicing, reporting, and grantee management

### About Washington Traffic Safety Commission

The Washington Traffic Safety Commission (WTSC) is Washington's designated highway safety office. They work in collaboration with numerous other state and local public agencies with the goal of reducing traffic fatalities and serious injuries to zero by 2030.

### More paper, more problems

"Traffic safety is about saving lives and reducing traffic fatalities and one of the ways we do this is by managing grants," says Pam Pannkuk, Deputy Director for WTSC. To promote traffic safety, WTSC receives federal funds on an annual basis and manages programs for each of those funds. These programs include providing high visibility enforcement, school zone grants, community coordination, and the prevention of impaired and distracted driving. Yet, working with eight program managers, it was difficult to have a streamlined process as everything was printed and managed in paper files in filing cabinets. "Every program involved so much paperwork. We spent a lot of time shuffling papers to our managers, and it delayed a lot of our program progress," says Pam Pannkuk.

Another complex component added to WTSC's process was tracking their funding from both federal and state agencies. This reporting was tracked from invoices that were managed through spreadsheets and PDFs. Often, this process was met with delayed results since papers and spreadsheets were exchanged back and forth between program managers, grantees, and the finance department. "Too much administrative time was spent on tracking down the information we needed," says Pam Pannkuk.

WTSC sought to depart from paper files to an automated system where grantees could not only apply for grants online, but they could also monitor grant status and see their budget status as well. They wanted a robust system that could easily manage their contracts and programs.

### The search for a better system

Finding a new system was a lengthy process. With the help of a contracted project manager, they defined their unique process. Then WTSC put out an RFP for a system that SmartSimple responded to. Six other companies responded, and they had demos from each system. “We selected SmartSimple because of how configurable it was, and the price points were right,” says Debi Besser, Program Manager for WTSC. Besser continued by saying, “we liked the flexibility of the [SmartSimple Cloud] system, and it was so user-friendly,” referring to the quick up-to-date access to application statuses and granular functionality of all the records in the intuitive user portals.



### Invoicing and federal management reviews made easier

After SmartSimple Cloud configured a system that met the Commission’s needs and requirements, they officially launched their system called WEMS, short for WTSC Enterprise Management System.

WTSC needed a system that they could control the look and feel of. Along with centralizing their data, they also needed a system that could accommodate changes in federal regulations. With their SmartSimple Cloud platform, they were able to create interactive displays with individualized views and dashboards with all the relevant information they needed. “We can now see all the invoices and the statuses they’re in — if they’ve been submitted, approved, and even request more information if we need. This helps with processing,” says Debi Besser. The WTSC staff used to work with paperbased spreadsheets and physically pass them to the program manager and sometimes they would get lost. “There was a lot of movement on paper. Now it’s all very visible,” continues Besser.

One major shift since modernizing their system is shedding unneeded administrative time. “Documenting communication has been helpful. We can forward emails and make notes, and our invoicing process has been a complete shift in transparency,” says Jerry Noviello, Program Manager for WTSC. Instead of having to pick up the phone or take time to draft emails to contact the department, grantees can go into the system and look at what invoices have been submitted and what’s been paid and stay on top of their budget.

**“The federal [government] can do a [financial] review from their regional office in Seattle since our new system is cloud-based.”**

**Debbie Johnson**  
Finance Director

Having all of the grant information in one central system made things easier for their federal oversight agency. They recently went through a federal management review, which is similar to an audit. “In the past, we would get out all the paper-based/paper folders, and they would have to come on-site and comb through all the records to make sure the all the monitoring and finances looked good. Now the federal agency can do the review from their regional office in Seattle since our new system is cloud-based,” says Debbie Johnson, Finance Director for WTSC. What was once a cumbersome review process became simplified. “The headquarters office in DC heard about the ease of our SmartSimple Cloud platform, and we provided a demonstration of the system for them,” continued Debbie.

### New programs to save more lives

Expanding on their current system, they have the flexibility to add in programs with ease. “We’re planning a project to gather enforcement data about officers’ activity,” says Erica Stineman Communications Consultant for WTSC. “This includes warnings, tickets, arrests, to ensure safety on the road”. WTSC is confident in its ability to continue to evolve their programs proactively into the future. ●

## Universities Canada



**Intuitive online application and review processes mean significant time savings for Universities Canada.**

### At a Glance

Universities Canada has a small team that handles a large volume of work, administering scholarships funded by private and public sector companies. They were managing more than 130 different programs with the combination of a decades-old system, spreadsheets, and cases of paper files. As their client-base grew, they realized it was time to modernize.

SmartSimple Cloud helped shift their entire application, administration, and review process online and into one, central system. The move to SmartSimple Cloud, meant that they no longer had to ship boxes of files around the country, and reviewers had more time to do thorough application reviews. A real-time integration was also built with Universities Canada's financial software, ensuring accurate, timely award payments. And, thanks to comprehensive training and a wide range of configurable features, Universities Canada were able to build and modify functions on their own.

"We now know the minute anything is completed, from submissions to payments to reviews. That's greatly improved our tracking. It's like comparing apples and oranges from our old system to SmartSimple Cloud."

#### Heather Cayouette

Director, Programs and Information Management



Universities Canada is a SmartSimple Cloud user

**SmartSimple client since:** 2015

**Type of giving:** Scholarships & Bursaries

**Dollars granted:** \$10 million to \$15 million CAD annually

**Old system:** Custom program built in 1999, paper, spreadsheets

**SmartSimple product/services:**

- [SmartSimple Cloud for Scholarship Management](#)

#### Key pain points:

- No expansion options
- Limited tracking and online access
- Unable to keep pace with changing technology and practices

#### New system must-haves:

- Highly flexible
- Detailed workflows
- Ability to operate in multiple languages
- Accounting software integration
- Realtime process management
- Self-sustaining

**Learn more about SmartSimple Cloud for Scholarship Management >**

**Request a Demo >**

### About Universities Canada

Universities Canada is the voice of Canada's universities. They advocate for higher education, research, and innovation. Universities Canada provides a forum for university leaders to share ideas and address challenges. They foster collaboration between members, governments, the private sector, international partners, and communities. Overall, they promote access to education by administering approximately 130 scholarship programs per year.

### An antiquated process in need of updating

The system Universities Canada had in place dated from 1999 and was configured in Oracle. "Our system was outdated and there was no room to expand or modernize our processes," says Justin Perrier, Scholarship Systems Analyst. "As automation standards evolved, our users needed the latest features and functionality that our existing system just couldn't provide."

"Our old system was managed by an external contractor," continues Justin, "And we really wanted a more self-sustaining option so we didn't need someone's help every time we wanted to make a minor change. We needed a company that

would partner with us to improve our processes; someone who would work with our standards, while keeping our program current as new technology and practices evolved.”

### Real flexibility, accounting integration, among key requirements

When it came time to look at upgrading to a new grants management system, the team built a spreadsheet to outline the functionality required in a new platform. “The list included the ability to support highly detailed workflows, meticulous tracking capabilities, powerful flexibility, the ability to manage multiple languages, upload documents, function in real-time, be self-sustaining, and seamlessly integrate with our current accounting software,” says Justin.

They agreed to consider any vendor who met at least 80% of their requirements, but, unfortunately, discovered that most vendors couldn’t even meet half of the organization’s goals.

Then, Heather Cayouette, Director, Programs and Information Management, found SmartSimple Software through a Google search. “It looked like we had found a potential partner, so we invited them to come in and show us what they had. SmartSimple Cloud was the only platform that looked like it would be able to meet our complex requirements. It seemed this was the solution we’d been looking for.”

### More functionality means more self-sufficiency

“Our programs work on an annual cycle. We manage between 10 and 12 review committees per year, and each reviewer can be responsible for up to approximately 150 files. The majority of our committees have about 5 reviewers, but we’ve had as many as 34 in a single committee. So, for us, a key improvement was being able to eliminate paper applications, and reduce the amount of time and energy expended by applicants, internal staff, and reviewers,” says Heather.

“We were so pleased with the amount of flexibility available in the platform, that we were able to extend our reach and use SmartSimple Cloud for other programs we manage,” says Justin. “And since changes could be done on the fly, I became excited to learn how to do much of the configuration work on my own, making us not only much more efficient, but more self-reliant as well.”

**“SmartSimple Cloud was the only platform that looked like it would be able to meet our complex requirements. It seemed this was the solution we’d been looking for.”**

**Heather Cayouette**

Director, Programs and Information Management

Justin used elements of SmartSimple Cloud to create integrations and tools, including the instantaneous transfer of information between their SmartSimple Cloud platform and financial software, giving them instant access to the data required for cutting checks and managing invoices. “SmartSimple Cloud makes it so easy to ensure payments are accurate, timely, and trackable.”

“Thanks to SmartSimple Cloud, reviewers no longer have to take shipping time into consideration when planning their schedules. They can access the system through their own secured, personal portals at their convenience, no matter where or when they prefer to work. This new review process has received more praise than any other improvement made by SmartSimple Cloud,” says Justin.

“SmartSimple Cloud has given me the freedom to focus on more strategic planning activities. As a nonprofit, we’re also able to leverage the financial savings gained by having our entire process online,” adds Heather. “My team has become much more efficient, reducing the need to perform monotonous administrative tasks like sorting and stamping papers.”

“Thanks to the success of SmartSimple Cloud, we plan to continue refining our system, and bringing more of our work online. Having all our projects operating on a single platform means we can have several workflows running at once, so we get more done in less time. And with the integration of SmartSimple Cloud and our accounting software, everything is organized, accurate and easily trackable.” ●





## ALIPH Foundation



**How newly formed ALIPH Foundation launched an easy-to-use grantmaking system in only 2 months to support its global mission.**

### At a Glance

The ALIPH Foundation (International Alliance for the Protection of Cultural Heritage in Conflict Areas) formed in 2017 with a unique mission: to keep heritage sites around the world safe in conflict or post conflict regions. As they embarked on their mission, it became clear that they needed an effective grantmaking solution to better achieve their goals – and quickly. In a matter of a few months, the newly formed foundation rapidly evolved from the ground up without any solidified grantmaking strategy to funding over 40 projects in 14 countries.

Today, they are a globally recognized foundation with a portfolio of successful projects. With the help of SmartSimple, ALIPH launched a grants management system alongside their new strategy to fund the protection and rehabilitation of at-risk heritage sites without delay. One year later, the Foundation collaborated with SmartSimple to expeditiously launch their Action Plan to support the heritage protection sector in the face of the COVID-19 pandemic with adequate online tools in just one week, so they could meet additional needs during times of global uncertainty.

“There’s no wasting administrative energy, and we can now spend more quality time reviewing instead of having to teach reviewers how to use the system.”

**Rosalie Gonzalez**  
Project Manager



ALIPH Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

**SmartSimple client since:** 2019

**Type of giving:** Grants

**Old system:** None

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- No grantmaking system or strategy in place to efficiently process and fund grant applications
- Had to deploy a system and accept applications within 60 days

### New system must-haves:

- An easy-to-use online grant application submission form
- A remote application review process to efficiently manage and disburse funds to applicants

### About ALIPH Foundation

ALIPH Foundation is the only global fund exclusively dedicated to the protection of cultural heritage, including museums and monuments, in a global effort to build peace in conflict and post-conflict areas. The public private foundation focuses on three main objectives: the preventive protection to limit the risks of destruction of heritage sites; emergency action to ensure the security of heritage sites; and post-conflict efforts to enable the local population to once again enjoy their cultural heritage.

ALIPH responds to relevant needs by working with local partners on every project to ensure the funding goes to where it's most needed. They offer two main grant opportunities: emergency relief for rapid support in protecting heritage sites under serious or imminent threat of destruction; and regular calls for projects to preserve cultural heritage endangered by conflict.

### A new foundation in need of a grantmaking strategy

ALIPH began from the ground up with no dedicated software to help them achieve their grantmaking goals. They also

had only two months to launch their first grant program and strategy. “We had to create both the strategy and the tool simultaneously and we knew we needed a tool to quickly receive grant applications,” says Rosalie Gonzalez, Project Manager at ALIPH.

Gonzalez and a lean staff of three others needed a nimble solution to help them get up and running without delay. Without a completed website, an established granting process, or an application form, the Foundation’s hard deadline was met by the SmartSimple team. “The main reason that convinced us to work with SmartSimple is that they committed to our very tight deadline and they did everything in their power to meet it with us” says Gonzalez.

Not only did ALIPH need help with grant application intake and review processes, they also wanted to have a front-facing grant submission process that was easy-to-use for all of their applicants. They faced a unique challenge. “When you work in conflict and post-conflict areas, people don’t often have a good internet connection and might not be able to use complex tools, so we really needed a simple solution,” says Gonzalez.

### Building a solution from scratch

ALIPH started collaborating with SmartSimple at the end of November 2018 and they needed an application process ready by a hard deadline in mid-January 2019. Although the timeframe was tight, SmartSimple delivered on its promises. “We were impressed with what was able to be implemented in such a short time,” says Gonzalez. “We built the application form together. Since we were a team of just four people at the time, SmartSimple’s team had experience in this field and helped us understand what we needed to do to create a streamlined grant application process.”

Throughout the implementation process, the SmartSimple team helped them to configure SmartSimple Cloud for Grants Management – around the Foundation’s unique requirements. ALIPH was provided with the feedback and expert advice they were seeking to launch with efficient grantmaking processes. At times, SmartSimple even worked with ALIPH to refine some of its original objectives to ensure they had the most efficient and flexible process to start with.

The Foundation launched their first online grant application form with clear instructions and easy-to-use built-in submission buttons. The implementation also included modules to accommodate its newly formed external review process. Reviewers from all over the world were able to log in, complete their forms remotely, and easily submit their reviews all from one convenient location. “We love that each reviewer form is linked to its specific grant application within the system. It’s convenient and straight to the point,” says Gonzalez. “There’s no wasting administrative energy, and we can now spend more quality time reviewing instead of having to teach reviewers how to use the system.”

### Responding quickly in times of uncertainty

A year after launching, COVID-19 quickly became a global pandemic. “We were in the middle of the review process of our third call for projects but when the pandemic hit, we knew we needed to shift our focus immediately and assist cultural heritage sites and the women and men who work there get through the pandemic,” says Gonzalez. The Foundation needed to add an emergency granting program to help protect cultural organizations from closing down completely by providing immediate aid to those on the ground.

With their staff already working from home, ALIPH developed an emergency action plan giving up to \$15,000 to help museums and other institutions to support the development of digital tools, purchase personal protective equipment (PPE), and cover running costs, including employee salaries. In collaboration with SmartSimple, they added an application for emergency funds within a week. Through this Action Plan, the Foundation was able to quickly respond to applications and fund almost \$2 million in grants so that smaller heritage sites, like museums, could survive during COVID-19.

### An easy-to-use solution to grow with

Now equipped with a cloud-based automation and collaboration platform to manage all its grantmaking, as well as an established grantmaking strategy, the ALIPH staff can use their flexible platform-based solution to dive even deeper for their detailed reporting needs.

“We’re learning how to create filters and List Views by project type, country, and extract them into an XML file to build complex reports from there,” says Gonzalez. She goes on to conclude, “when we sometimes receive PDF application forms, we can upload them into our system, but it gives us a glimpse into what things would’ve been like if we didn’t work with SmartSimple.” ●



## Feeding America



**A significant increase in volume and complexity calls for a unique solution for Feeding America.**

### At a Glance

Feeding America's team faced significant challenges handling an ever increasing volume of data, and granting complexities. Their manual process was proving inefficient so an alternative was needed. SmartSimple Cloud provided the automation, data storage and quick access to the right information for comprehensive reporting.

"We would not have been able to absorb the volume and increasing complexity of our grants without a solution like SmartSimple Cloud."

**Anne Bronson**

Managing Director of  
Member Grants

**SmartSimple client since:** 2014

**Dollars granted:** \$50 million in 2016

**Old system:** Manual process

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)
- [Premium Support](#)

### Key pain points:

- No central data repository
- Difficult to work with
- Data dispersed across a mix of different software programs
- Manual process was time-consuming and tedious

### New system must-haves:

- The ability to do ad-hoc reporting
- A centralized data repository
- Create workflows
- Have automated reminders for grantees



Feeding America is a SmartSimple Cloud user

**Learn more about  
SmartSimple Cloud for  
Grants Management >**

**Request a Demo >**

### About Feeding America

Established in 1979, Feeding America's mission is to feed America's hungry and engage the country in the fight to end hunger. Since then, Feeding America has become the nation's largest domestic hunger-relief organization, working through a network of 200 food banks across the country. They currently feed 46 million people at risk of hunger each year, including 12 million children and 7 million seniors.

### In the beginning

For years, Feeding America's granting activities were managed through a patchwork of different software programs. This meant that staff had to go through the arduous process of manually entering data and re-keying data into multiple programs. "Our internal IT department set up an access database to store information, but it did not really help us manage our day-to-day activities and reporting was very difficult," says Anne Bronson, Managing Director of Member Grants.

"A single grant would be spread over several software programs. For example, the main application would be done through Microsoft Word and attachments would have to be sent in via email. Even when an application was done through SurveyMonkey, attachments would still have to be emailed because SurveyMonkey does not accept attachments. Without a central repository, it was very difficult to analyze data to get any real information; everything was spread out over multiple files in different locations."

"I was surprised when I first joined the organization by the amount of work that was being completed by hand," adds Renie Henchy, Manager of Member Grants. "I saw the pain such a manual system was causing. With the tremendous amount of growth Feeding America was experiencing at the time, we definitely needed a new, automated system."

### A unique foundation with unique needs

"Most foundations – family and community-based – use some form of endowment or have a regular pool of funds with cycles of strategic programming," says Anne. "Feeding America is different. We raise funds from various streams;

foundations, corporate and individual donations.”

“Each grant opportunity is its own unique process,” adds Renie. “It makes management of the overall granting program challenging due to the range of initiatives, timelines and requirements. We also operate with a closed pool of applicants – our member food banks – and their eligibility for specific grants is defined in advance. This means, essentially, that our grants are invitation only. All member food banks have access to our Intranet, where we post all upcoming and active grants as part of our commitment to transparency, but particular funding options will only be visible and open to applicants in the new system if they meet the eligibility requirements outlined by a particular funding opportunity.”

“We really wanted to be able to create workflows for all our manual communications processes,” adds Anne. “To be able to automate confirmations, report reminders and changes in contact information is huge for us, and saves us many hours of time.”

With a small team of four, an annual budget of about \$25 to \$30 million, and between 70 and 80 separate grant opportunities to manage each year, Feeding America needed a centralized system that could store, track and report their unique funding activities. “We definitely wanted to do more regular, proactive reporting,” continues Anne. “Our data needs to be updated all the time - dollar amounts, number of grants, coding of grant types and so on. With regular requests for ad-hoc reports based on a variety of programs, donors, and grantees, we needed to be able to access the right data quickly for every individual request.”

After getting input from colleagues and reviewing the Idealware report, SmartSimple Cloud became the solution of choice. “SmartSimple Cloud checked all the boxes for us. The other systems we saw just didn’t offer as much flexibility and automation as we saw in SmartSimple Cloud,” said Renie.



**“Without a central repository, it was very difficult to analyze data to get any real information; everything was spread out over multiple files in different locations.”**

**Anne Bronson**

Managing Director of Member Grants

SmartSimple not only gave Feeding America the central data repository and automation they had been looking for, they were able to add scheduling, workload management, and both periodic and ad hoc reporting. This provided a complete end-to-end, online grants management process that met Feeding America’s unique grants management needs. “We finally have a one-stop shop for all our programs and activities that is all interconnected and much more automated. A member of our team used to have to spend at least two or three hours each day going through our email inbox, sorting applications, grantee reports and general mail. Now that takes less than an hour.” shares Anne.

“SmartSimple Cloud enabled us to configure and automate our unique system the way we wanted and needed. The platform was able to automate the unique requirements of our operation and we now have a central repository of information that’s now accessible to those working across all our food banks, as well as our staff. There is no way we would have been able to absorb the volume and additional complexity we currently have without a system like SmartSimple.” ●

## Girls First Fund



**How Girls First Fund scaled its international grantmaking with a more flexible, intuitive, and all-in-one grants management system.**

### At a Glance

Girls First Fund (GFF) was founded as a donor collaborative with a compelling mission: to ensure that all girls have the opportunity to realize their full rights and potential. From the outset, GFF knew that it would need a robust and flexible cloud-based system to manage a complex grantmaking process that could reach community-based organizations in multiple countries. GFF started working with SmartSimple in 2019 during its inaugural year of grantmaking. With SmartSimple's help, GFF's mission and team were empowered with a new grants management system that eliminated hours of manual data entry from their workload while providing flexibility to meet the fund's evolving needs.

Best of all, the new cloud-based system enabled easier engagement with organizations in remote communities that previously faced barriers to accessing international funding, while also supporting the fund's multi-language users to quickly master their new application portal. One year later, GFF has granted \$5.8 million globally to 150 organizations, held 165 focus group discussions with 69 local stakeholders, and facilitated workshops with grantees in six countries. Thanks to the new system powered by SmartSimple Cloud, GFF now has greater agility to respond to the changing needs of its grantees, particularly during COVID-19, and with an eye to further expand grantmaking.

**SmartSimple client since:** 2019

**Type of giving:** International Grants

**Old system:** Survey form-based solution, spreadsheets, documents

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- Non-centralized processes made managing multi-language grants cumbersome
- Applicants with unreliable internet couldn't always save their work on applications/reporting
- Previous system was underutilized and mainly used for processing payments

### New system must-haves:

- Reduce language and accessibility barriers for applicants and grantees in remote areas
- A more flexible system that could adapt as the organization developed and refined its grantmaking strategy
- More visibility over payment processing across teams
- Centralized due diligence processes for international grantmaking



"Most of our manual work has been eliminated since using SmartSimple Cloud. Just being able to push a button and have grant agreements auto-populate rather than having to go in and manually enter changes and updates for 150 organizations has been huge"

**Beth Zimmerman**  
Program Officer



Girls First Fund is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Girls First Fund and Geneva Global

Girls First Fund (GFF) envisions a world where girls have access to the skills and resources they need to live a life free from child marriage and create their own futures. Managed by Geneva Global, GFF is a donor collaborative that launched in 2018 to fund community-led organizations addressing the issues of child marriage and gender equality.





GFF officially launched its grantmaking in 2019, a year dubbed “The Learning Year” because it was heavily focused on learning from grantees, community members, and girls about their needs and how the fund could best provide them with the most appropriate support.

In that first year, GFF granted amounts ranging from \$5,000 to \$50,000 to 150 organizations across six countries: the Dominican Republic, the Democratic Republic of the Congo, India, Nepal, Niger, and Uganda. Roughly 40% of these organizations were historically underfunded.

GFF is a philanthropic fund of Capital for Good USA, a U.S. 501(c)(3) public charity, with services provided by Geneva Global, a certified B Corporation that provides advice and services to support a wide range of philanthropists, foundations, nonprofits, mission-driven companies, and other charitable organizations to maximize their social impact.

### A system to connect remote community-based organizations to funding

Before implementing SmartSimple Cloud for Grants Management, GFF wasn’t using its existing grants management system to its full capacity. “We had a grants management system that we used primarily for payment processing,” says Beth Zimmerman, Program Officer, Girls First Fund. “So, for other funds we worked on, we had to do a lot of manual data collection and monitoring. As you can imagine, it was pretty cumbersome.” It was also difficult for GFF’s team to quickly pull reporting and the exact data they needed.

As GFF prepared to place its inaugural grants, it wanted to have a system in place that would be both empowering and easily accessible to applicants and grantees. “We knew we needed to identify a system that would reduce barriers and give applicants access, not just to applying for our funding, but also to get exposure to a system that might propel them to be able to apply for other funding as well,” says Beth.

“One thing I’ve always appreciated about SmartSimple is that for any need we’ve had, they’ve figured out a solution.”

**Beth Zimmerman**  
Program Officer

One of the biggest funding barriers was language. GFF currently works with applicants and grantees in English, French, Spanish, Hindi, and Nepali. Before transitioning to SmartSimple Cloud, the fund was frustrated by difficulties with configuring, accepting, and reviewing grant applications when it came to working with multiple languages.

Another critical barrier was ease of use for the applicants and grantees. Many applicants are nascent organizations that had never applied for a grant online before.

With many living in remote areas with often unreliable internet access, they needed to easily auto-save their applications or progress reports in case their connection cut out. “Some of the groups that we were funding had never before received international funding. They didn’t have experience with reporting or with having to interact with the donor,” says Malorie Tull, Senior Program Officer of Girls First Fund. “These groups have been able to utilize and navigate the system. That was a huge factor for us.”

### Building a global grantmaking solution on-the-fly

GFF approached SmartSimple in October 2018, but it needed to go live before the entire system could be finalized. Although GFF’s grantmaking strategy was still being solidified at the time, SmartSimple was able to implement the system iteratively while also providing step-by-step guidance throughout the process. “There was a lot of calibration, at least in the initial few months, to figure out what we needed to communicate for SmartSimple to be able to build what we were envisioning while it was still in-process,” says Beth.

The SmartSimple team helped GFF configure SmartSimple Cloud and delivered a personalized solution around the fund's unique requirements. After a brief learning curve, the GFF team was soon able to run with its new system. "Since then, we've done additional configuration work and those projects have gone really smoothly," says Beth. "One thing I've always appreciated about SmartSimple is that for any need we've had, they've figured out a solution."

The fund's new grants management system allows program officers to painlessly access and generate grant agreements and board dockets at the push of a button. It also simplified financial and due diligence processes, organizing large data sets and complex information into an easily accessible hub. Tasks once performed manually are now automatic, such as verifying bank information and SWIFT codes, or checking expiry dates on registration documents. "Most of our manual work has been eliminated since using the system," says Beth.



### Responding swiftly to emerging needs

COVID-19 hit when most of GFF's grantee partners were at the end of their first year of funding. Suddenly, these partners had to scale back the programming they had originally proposed. In response to these emerging community needs, GFF knew it needed to be more flexible with the types of grants offered.

**"Most of our manual work has been eliminated since using the system."**

**Beth Zimmerman**  
Program Officer

The GFF team decided to respond by shifting program support towards the core needs of grantees for greater flexibility, and offering no-cost extensions where needed. Thanks to the flexibility built into SmartSimple Cloud, the amendment process was quick and easy to implement, with features allowing grant managers to quickly document changes to the grant or add questions to reporting.

### GFF sets its sights on expansion

Now equipped with a cloud-based automation and collaboration platform to manage all its grantmaking globally, the GFF team can use the added flexibility to strengthen mentoring and support of current grantees. Meanwhile, GFF continues to find new ways to improve its internal processes. "We've talked about streamlining our donor reporting a bit more and building out some more quarterly push-button reports," says Malorie. "There's also some potential for our Monitoring, Evaluating, and Learning (MEL) processes."

Supported by its new system, GFF has gained the efficiency to generate even more impact. "I don't think we could do what we're doing with the number of people we have if we didn't have the system in place. There's no way." ●

## Rotary International



**Multilingual access and seamless integrations for Rotary International.**

### At a Glance

Rotary International built their custom system in-house in conjunction with an overhaul of their granting model. The idea was to build them in tandem so that the system would do exactly what they needed to manage their grant program. Unfortunately, it was very difficult to make system modifications and keep pace with process changes. Realizing they needed some assistance, they put out an RFP to search out a solution.

Some of the requirements that needed to be met included the ability to function in multiple languages and integrate with their other enterprise software. They chose SmartSimple Cloud for Grants Management for the limitless configurability and ability to meet every one of their requirements while offering several other process improvements. And, with the assistance of Gen3, they now have the fully integrated grants management solution that meets their broad and ever-changing needs.

**SmartSimple client since:** 2012

**Type of giving:** International Grants and scholarships

**Previous platform:** Custom in-house built system

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key challenges:

- Old custom-built system unable to keep pace with Rotary's complex, global requirements
- Slow and clunky system performance

### Gen3 Impact:

- Built a system that supports Rotary's global grantmaking, supporting 8 different languages
- Improved system performance and reduced page load time by 89%
- Integration built with Rotary's enterprise software



"Our relationship with Gen3 is completely unique. We're always pushing the envelope, seeing what else the platform can do."

**Brent Drage**

Product Owner, Grant Center



Rotary International is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Rotary International

Rotary International is a global community network of 1.2 million members — with nearly 320,000 in the US alone — working from more than 35,000 clubs around the world. Their goal is a planet where all people unite and take action to create lasting change. They currently administer 30,000 service projects, and their volunteers work in excess of 24 million hours per year.

Rotary members believe in a shared responsibility to take action on the world's most persistent issues, including:

- Promoting peace
- Fighting and preventing disease
- Clean water, sanitation, and hygiene
- Equal rights for mothers and their children
- Education
- Growing local economies



In 2017, more than 8,000 students became global citizens through the Rotary Youth Exchange, 400 million children were immunized against polio, and Rotarians built a 36,000-liter rainwater harvesting system to serve communities in Papua New Guinea. Overall, Rotary manages funds in 29 currencies to provide life-changing and sustainable grants, programs, and services.

### The evolution of an international grants management solution

"We figured we'd start working on a new system and pilot a new granting process at the same time," says Brent Drage, Product Owner, Grants. "The problem was, the system we were trying to build couldn't keep up with program changes we were making. We found we were modifying things constantly as the pilot progressed. It was like trying to build a plane while we were in flight."

It became incredibly difficult for the in-house team to keep pace with all the changes being requested. "The whole reason for conducting the pilot was to figure out exactly what we needed in a new grants management system," continues Brent. "That said, we knew there was no way we'd find anything that would work for us right out of the box. We required something configured to meet our specific needs."

### The quest for a configurable grants management solution

The team decided to put out an RFP and look for a grants management platform that could handle all the complexity Rotary needed to manage their vast array of international giving programs. "The biggest challenge we knew we'd likely face was finding something that could do all we needed, and accommodate the 8 languages we operate in," adds Brent.

**"The ability to translate our granting into different languages was a critical component that Gen3 was able to configure for us."**

**Brent Drage**

Product Owner, Grant Center

After reviewing a shortlist of potential software vendors, Rotary found the SmartSimple Cloud for Grants Management to be the most capable to handle their unique requirements.

Gen3 played a significant role with Rotary from the start, and they continue to assist them today with system enhancements. "Gen3 has continually done a great job for us, jumping in to help us, figuring out what we need and coming up with unique solutions that only they can provide," says Brent.

"The ability to translate our granting into different languages was a critical component that Gen3 was able to configure for us," continues Stephen. "Gen3 also helped us to seamlessly integrate with our accounting, and content relationship management (CRM) software."

"Our relationship with Gen3 is completely unique," adds Brent. "We're always pushing the envelope, seeing what else the platform can do. Gen3 is always able to work through our requests and solve our problems. The system consistently meets our needs and adapts to any changes we want to make." ●

## Boehringer Ingelheim



**How the world's largest private pharmaceutical company built a unified platform for its research funding process and scaled it across the globe.**

### At a Glance

With more than 51,000 employees operating in 18 countries, Boehringer Ingelheim (BI) has a massive global footprint. A critical piece of its business is the funding of medical research and development, and in 2019 the company identified a key area of opportunity. BI's research grants management processes were manual and needed updating.

BI needed a consolidated solution; a single platform to unify its global grantmaking while being flexible enough to capture the needs and nuances of each local operating unit. Gen3 converted BI's unique and highly complex requirements into capabilities on SmartSimple Cloud in a vastly ambitious multi-stage build. The result was a transformation of how BI manages its funding through a centralized platform routing all requests globally, which the company branded Lectrona. Lectrona automated workflows and reporting made the funding process more transparent to stakeholders and strengthened collaboration with BI's affiliates and partners worldwide. The project was successful and in 2021 BI plans to expand the system even further for other lines of business.

"At the beginning of this initiative, our vision was for the platform to be a one-stop-shop solution for third-party funding requests. Our global funding platform – Lectrona – makes managing the funding application process easier, for Boehringer Ingelheim and applicants alike."

**Stanislav Kischner**

Global Data & Platform Owner



Boehringer Ingelheim is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

**SmartSimple client since:** 2019

**Type of giving:** External Research Grants and Medical Education Grants

**Previous platform:** Decentralized, manual processes

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)

### Key requirements:

- Streamlined workflow management for all funding types: grants, sponsorships, investigator-initiated studies, collaborative research, charitable contributions
- Transparent handling of each step of the granting process with robust reporting to avoid compliance-related issues
- Seamless collaboration with global partners

### About Boehringer Ingelheim

Headquartered in Germany, Boehringer Ingelheim (BI) is a world-leading research-driven private pharmaceutical company creating value through innovation in three business areas: Human Pharma, Animal Health, and Biopharmaceutical Contract Manufacturing. In 2019, the company achieved net sales of \$21.3 billion, with its biggest markets in Germany, the US, Japan and China. BI has invested over \$3.9 billion in R&D by providing grants and charitable contributions to advance discovery and enable the next generation of medicines that save lives and improve quality of life.

### A decentralized, manual system for funding requests

Prior to working with Gen3, BI's funding managers received requests sporadically – by email, verbally at events, and even through physical mail. With no standardized intake process, applications were processed by siloed regional affiliates based on local procedures that required enormous manual effort.



## Choosing an effective grants management solution

BI started by defining a set of global operating procedures and requirements to guide their RFP process. First on the list was standardization. The platform had to capture BI's multi-faceted grants management process and standardize it globally, while providing a pain-free user experience for applicants.

The next priority was transparency of BI's grants approval stages for both financial tracking and compliance purposes. To keep all stakeholders informed and compliant, the new platform had to give BI advanced reporting and tracking capabilities.

Another priority was enabling what BI calls External Collaborative Research. "Our starting point was to fund partners on specific requests for research grants," says Kischner. "But as we thought about other engagement types, it became important to build an efficient process – and a system that supports that process – in the area of external collaboration."

Whether contributing expertise for clinical research, creating a protocol for a study, or engaging in partnerships on data and technology or outcomes research, BI's goal was to keep everything on one platform to seamlessly collaborate with applicants.

SmartSimple Cloud was chosen as the best platform to manage and unify BI's global funding efforts based on these requirements.

## A unique service for a complex global implementation

BI, with Gen3 as a trusted partner, mapped out its entire funding management process. The unique requirements and sheer scale of such a global implementation went beyond SmartSimple Cloud's standard research grants management solution, so Gen3 fully tailored the platform to match BI's particular needs. The result was a reinvention of BI's workflow in a centralized hub for all funding types – grants, sponsorships, investigator-initiated studies, and collaborative research programs.

## A responsive multi-stage rollout

BI's funding managers gained capabilities within the platform like reporting, filters, emailing, and guided workflow management to react quickly to applicants and even automate the assignment of reviewers for certain types of requests. As for compliance, "I get all my relevant spend reports in time and quality; all customers are checked via a pre-defined standardized debarment process," says a BI compliance manager.

Beyond the initial deployment, BI's list of functionalities kept growing. Take Japan, one of its core business units. "Whenever we implement new models globally, there are questions from countries like Japan on whether we can translate it, as the majority of their platforms are translated," says Kischner. Gen3 made it possible for BI to fully translate Lectrona for customers in Japan – no small feat when converting software from an alphabetic language like English to a character-based language like Japanese.

## Rapid responses to a global pandemic

During the pandemic, BI received numerous requests for COVID-19 research funding through Lectrona. The company could react quickly to these because Gen3 had made the review process itself more efficient. Reviewers provided input and assessed funding requests and program outcomes much faster than before. With such a flexible platform, BI has accelerated its responses to those with immediate funding needs to make an impact during turbulent times.

## Expanding the use of the platform

Given Lectrona's success, BI plans to implement other projects – charitable contributions, animal health research funding, co-pay foundation supports – just to name a few. And it doesn't stop there. "In 2021 and beyond, we're looking at partnerships with payers and care groups around the world, to see if we can manage those more complex partnerships through the standardized process on Lectrona," says Kischner. All those programs and data will roll up within the platform to further highlight BI's impact on medical research across the globe.

As Dr. Mehdi Shahidi, Senior VP Medicine, says, "We're in a great time of innovation, and as BI we want to be sharing our success for the ultimate benefit of the patient." ●



## Annenberg Foundation



**How the Annenberg Foundation accelerated its grantmaking to capture the vital work of grantees across the US and world.**

### At a Glance

The Annenberg Foundation supports a wide range of initiatives nationally and globally. During 2019, the family foundation's total charitable distributions were \$114.9 million. Before working with SmartSimple, the Grants team relied on a decentralized grants management system. It was time for the Foundation's online application to be upgraded, making comprehensive applicant vetting faster, and cutting down on the time spent manually entering data, printing and scanning documents, and managing email communications with grantees. The team knew they needed to reduce their administrative burden while offering a more modern, user-friendly platform to applicants and grantees. By implementing the SmartSimple Cloud for Grants Management solution, the Foundation has practically eliminated time-consuming manual processes for a centralized, cloud-based "filing system" for all its grantmaking operations. As a result, the prominent family foundation has seen greater efficiencies across the lifecycle of its grantmaking programs.

"We spent a lot of our grants administration time entering information into the multitude of custom fields. That time has been greatly reduced with SmartSimple Cloud."

**Katrina Ashley**  
Senior Grants Manager



Annenberg Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

**SmartSimple client since:** 2018

**Type of giving:** Community and International Grant

**Old system:** GIFTS Classic, manual processes

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- Application process was time-consuming, slowing down vetting and limiting the Foundation's reach
- GIFTS only allowed for one application type, causing further administrative challenges
- Program and grants administration teams worked separately in two different systems

### New system must-haves:

- Offer grantees a more modern, user-friendly experience
- Allow all forms to be branded and tailored to respective programs
- Increase internal efficiency through automation

### About Annenberg Foundation

Established in 1989, the Annenberg Foundation is one of the largest family foundations in the United States. The Foundation supports organizations across the US and the world through national and international giving initiatives, including the Annenberg/Corporation for Public Broadcasting (CPB) project (now Annenberg Learner). Guided by the Annenberg family's values, the Foundation's grantmaking focuses on supporting the arts, animal welfare, education, civic engagement, and technology.

Today, the Annenberg Foundation is led by Wallis Annenberg and her three children, who each lead their own initiatives. In the wake of COVID-19, the Foundation decided to shift its discretionary grantmaking to help communities through focused pandemic response efforts.

### A grant application and review process in need of an overhaul

Before migrating to SmartSimple Cloud, the Annenberg Foundation used GIFTS Classic with an add-on component known as IGAM, which received online proposals for one of the Foundation's many grant programs. All other applications to this leading philanthropic foundation came in by email. Its previous system only allowed a one-step application process, which meant a significant time investment was required upfront for applicants to engage with the Foundation and submit proposals. To save applicants time and receive more applications, the Foundation wanted to break up the application process into two steps.



"We know it can be a burden on our applicants to submit a full form at once, only to have it declined because they're not eligible," says Katrina Ashley, Senior Grants Manager with the Annenberg Foundation. SmartSimple Cloud allowed the Foundation to revamp and improve its applications process. As a result, the Program team could pre-screen applicants with a brief LOI (Letter of Inquiry) application to determine their eligibility before completing the full Community Grantmaking (CGM) application. "Now with the workflows built into our system on SmartSimple Cloud, we have more time to read our LOI forms and give great feedback," says Ashley.

Having a two-step application has also freed up the Foundation to cast a wider net on potential grantees and find eligible causes even faster. From its last year using the previous system in 2017 to its first full year using SmartSimple Cloud in 2019, the Foundation's number of received applications increased from 217 to 389 – almost an 80% increase!

Now capable of developing multiple grant forms with its new grantmaking solution, the Foundation now offers a more efficient application process to its grantees. "Many of our grantees appreciate having that information at their fingertips," Ashley says.

### An intuitive, new system to streamline its grantmaking process

Before SmartSimple Cloud, the grants department used two separate systems, one for the administration team and one for program staff. By contrast, the new system would house everything in one place, which meant it needed to be intuitive for all users. "One of the main reasons we selected SmartSimple Cloud was because of the look-and-feel of its dashboards and portals," says Ashley. "We felt that it was a better fit for our needs."

**"Now with the workflows built into our system on SmartSimple Cloud, we have more time to read our LOI forms and give great feedback."**

**Katrina Ashley**

Senior Grants Manager

SmartSimple Cloud's ease of use allowed the Foundation to quickly create multiple grant application forms corresponding to different initiatives. "One of the great things about SmartSimple Cloud is that it has its own schedule, calendar, and deadline piece. It allows us to create different forms for specific programs," Ashley continues. The Grants team worked with leadership and SmartSimple to ensure each form had consistent branding and requested the information relevant to each initiative. Tailoring its grant applications to the specific initiative increased speed and accuracy in the applications process.

### Powerful, new efficiencies within its grants management process

With its new centralized online system in place, the Grants team has eliminated data entry inefficiencies and significantly reduced paper usage. "We really set out to decrease our data entry time moving into a new system," says Ashley. "We spent a lot of our grants administration time entering information into the multitude of custom fields. That time has been greatly reduced with SmartSimple Cloud."

Working with SmartSimple, the Grants team built out its reports to eliminate the manual uploading process. "Now we have a reports portal where the grantees can submit their financial reports to us directly, so we no longer have to go back and look for an email." The Grants team can also schedule reminders to keep everyone on track. "With SmartSimple Cloud we were able to put in multiple reminders to grantees that their report is upcoming or overdue. So, we don't have to hunt for anything," Ashley continues.

A game-changer for the Grants team was the Email Anything feature built into SmartSimple Cloud, enabling them to easily attach emails and documents to grant records by forwarding them to a unique email address. "With that a unique email address for each grant record, we're easily able to have all communications in one place," Ashley says.

Having one tab dedicated solely for Due Diligence notes was another big win for increasing efficiency while reducing data entry. "Before using SmartSimple Cloud, we had multiple Due Diligence tabs we would have to fill out," Ashley continues. "Now, our data entry is down to one tab, and we don't have to type it in manually, so it's a lot faster."

Now equipped with a cloud-based grantmaking system, applicants can quickly and securely upload their information themselves. "It's all automatically saved into SmartSimple Cloud and the appropriate grant record, so we don't have to spend time at the scanner uploading documents into our system," says Ashley. "That's also made it easier to advocate to go paperless."

### Timely and dedicated tech support for its unique needs

Although the Foundation required a fast implementation process and a short grantmaking shutdown period, SmartSimple was thorough and attentive when understanding the Foundation's unique needs. "The team at SmartSimple really took the time to talk things out and understand our system well," Ashley continues. "It was great to have their support with us on this journey."

Rather than lock themselves into a new workflow, the Foundation wanted to keep and fine-tune its existing processes. Here, SmartSimple delivered through both its configuration of SmartSimple Cloud as well as its ongoing support services. The Grants team was pleased with SmartSimple's Premium Support Services, whose assigned Dedicated Support Representative promptly handled all its support requests. "As we migrated and implemented our new grantmaking system, we knew there were going to be kinks we needed to work out. It's just great to have a dedicated support person who knows our system inside-out," says Ashley.



**"The Foundation's number of received applications increased from 217 to 389 – almost an 80% increase!"**

**Katrina Ashley**

Senior Grants Manager

### A safe and seamless transition to work-from-home

During the pandemic year of 2020, the Annenberg Foundation supported 200+ grants with more than \$40.7 million in total – a real testament to the reach of this family foundation across the US and the globe. According to Ashley, it could not have achieved this without a centralized, cloud-based system that facilitated a seamless transition to working from home. "When we transitioned to work-from-home, the grants department did not miss a beat," says Ashley. "We could just go home, log in, and continue our work."

Meanwhile, the Foundation successfully underwent its first virtual audit. The Grants team could quickly and securely pull the information they needed from the platform so that no one had to run back to the office. Within SmartSimple Cloud, the Grants team can even create an auditor user role and log-in details so the auditor can access the files virtually in the future.

### Leading the way to better serve its grantees

In 2021 and beyond, the Annenberg Foundation hopes to tell a richer story with its grantmaking data by further building out its reports using SmartSimple Cloud's built-in chart and mapping capabilities. The Grants team also aims to modify its forms using versioning and multilanguage and accessibility features. "At the end of the day, it's all about our grantees and making sure we're not putting undue burdens on them," says Ashley. "We want to make sure we can capture the great work that they're doing." ●

## Bader Philanthropies



**Breaking away from the limitations of a rigidly structured grants management system for Bader Philanthropies.**

### At a Glance

Bader Philanthropies had been using GIFTS for years. The system was static, slow and inflexible. GIFTS was not robust enough for them, and they were eager to move to an online system, so the team decided to look for an alternative and found SmartSimple Cloud. Not only was SmartSimple Cloud much more flexible, it could be accessed from practically anywhere. And, thanks to their pay-per-use pricing model, user fees dropped significantly. There was no limit to how many users could be in the system at a time, and the budgeting module made their program-related investments (PRI) amortization schedule easier to calculate and track.

**SmartSimple client since:** 2014

**Type of giving:** Grants

**Dollars granted:** Approximately \$16 million annually

**Old system:** GIFTS Classic

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)
- [Premium Support](#)

### Key pain points:

- Software was inflexible
- The system was getting expensive to maintain
- No online access
- Only a limited number of users could be in the software at a time
- Uploading documents took too long

### New system must-haves:

- A broader range of features
- Ability to grow with the organization
- Remote access
- Cloud-based
- Automated workflows
- More flexible pricing options

"The SmartSimple team really listened to what we wanted and needed in a grants management system. They offered the flexibility and accessibility we were looking for and at a reasonable price. Our applicants also praise the system, finding that completing their applications is so much easier and involves a lot less work than with GIFTS."

**Kim Thao**

Operations Manager



Bader Philanthropies is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Bader Philanthropies

Formerly the Helen Bader Foundation, Bader Philanthropies, continues to foster Helen's passion for people, while furthering Isabel and Alfred Bader's shared interests. The overriding goal of the organization is to make the world a better place to live. The Helen Daniels Bader Fund (HDBF) supports health initiatives for older adults in Wisconsin, particularly associated with Alzheimer's.

HDBF also brings the arts to underserved audiences, while the Helen Bader Scholarship Fund provides funding for Jewish day school education. The Isabel and Alfred Bader Fund (IABF) strengthens low-income Milwaukee families through their Workforce Development and Community Partnerships for Youth programs. IABF also supports Jewish education in greater Milwaukee.

### Nowhere to grow with a stunted system

After using a very limited, outdated system for years, the team at Bader Philanthropies knew it was time to look into a new grants management solution. "The GIFTS product we'd been using was dated and not meeting the demands we were putting on it," says Kim Thao, Operations Manager. "We were always looking for new ways to improve our process and GIFTS just didn't have the flexibility we needed for it to evolve with us."

"We could only use the system in the office and, as we had to pay fees for each individual user, it was getting expensive. We had 17 staff with access but only had 7 user licenses, so if someone needed to do work, they often had to run



around the office to see if anyone would get out of the system so they could get in. Everything cost extra, their support team was taking days to reply to requests for assistance, and bringing in grant applications to the system could literally take an entire day.”

Bader Philanthropies was looking for a much more adaptable system that offered easier user access, faster upload times and more responsive support. They also wanted a system that would be capable of handling their program-related investments (PRI) and included a tool for automating their email reminders. “While price for a new platform was certainly an issue, we were looking to extend the overall functionality of our system.”

Kim knew once she saw a demo of what SmartSimple Cloud could do that this was going to be the right choice for them. “The automated workflows were a big plus for us. And we were excited that SmartSimple’s licensing fees were completely based on actual usage, not number of users.”



### Diving deep into Bader Philanthropies’ processes

Before starting to build Bader Philanthropies’ solution, the SmartSimple implementation team did a thorough review of all Bader Philanthropies’ processes. “A Systems Solution Architect came to our offices and reviewed every single step of our process with us. She took the time to ask us questions to make sure she was able to wrap her head completely around how we did things. She took the information back to the rest of the SmartSimple implementation team to start building out our system.”

Kim asked some of the foundation’s past grantees to test out the system from their standpoint and see what they thought. “The overwhelming response was, ‘that’s all I need to do?’ They all said it was much easier to use than GIFTS and there was less actual work for them to do to complete an application. They also appreciated being able to see all grant requests from their organization and not just the requests they started or submitted.”

### Discovering the advantages of a completely automated process

“Our team is also finding SmartSimple Cloud for Grants Management a lot easier to use than GIFTS. Everyone has been finding shortcuts to save time during the day and discovering new ways to do things like creating reports and list views. They love that they can share reports with anyone they need to. The PRI module that was built for us has been fully integrated into the budgeting process. The amortization feature calculates repayments for us automatically, so when repayments come in, the money instantly gets added to our budgets and tracks them along with all our other budgeting activities.”

**“The overwhelming response was, ‘that’s all I need to do?’ They all said it was much easier to use than GIFTS and there was less actual work for them to do to complete an application.”**

**Kim Thao**

Operations Manager

“The automated workflows are also great to have. With the ability to set triggers for reminder emails ahead of time, we never have to worry about waiting for someone to find time to send them, so all our communications go out on schedule. I would absolutely recommend SmartSimple Cloud to other organizations and foundations. It’s a great solution and will make anyone’s life so much easier.”

### Added support for increased functionality

To add even more efficiency to their system, the Bader Philanthropies team opted to add Premium Support Services to their platform. “Our Dedicated Support Representative (DSR) has been fantastic. He is incredibly responsive to all our requests for help. And because he has intimate knowledge of our system and our process, he’s been invaluable, doing work for us on our workflows, PRI modules and new features we would like to add to our current system.” ●

## Helios Education Foundation



**How Helios Education created a versatile, cloud-based grants management system that elevated their reporting capabilities.**

### At a Glance

The Helios team was dealing with a cumbersome system that had no remote access for their people working in the field. Aggregating data to report on outcomes or results was difficult and sometimes not possible. Most of the staff didn't understand how the system worked as nothing was intuitive. By implementing SmartSimple Cloud and working closely with their committed support team, members of the Helios team finally had a system their entire organization could use to collaborate and build comprehensive, detailed reports.

**SmartSimple client since:** 2013

**Type of giving:** Grants

**Dollars granted:** \$17.4 million in 2016

**Old system:** Outdated database-type product stored on in-house server

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- No remote access
- Difficult to pull out data
- No proper tracking system for documentation
- No intuitive reporting option

### New system must-haves:

- Accessible outside the office
- Web-based
- Complete program tracking
- Robust reporting features

"We've gone from a system only four people used to a truly organizational tool. SmartSimple Cloud is ideal for increasing efficiencies, but it's so much more than that. It's built for tracking engagements, contracts, and users, making it absolutely invaluable for managing our grants and other activities."

**Linda Thompson**

Senior Vice President and Chief Impact Officer



Helios Education Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About the Helios Education Foundation

Helios Education Foundation is dedicated to creating opportunities for individuals in Arizona and Florida to achieve a postsecondary education. Their work is driven by four fundamental beliefs in Community, Equity, Investment, and Partnership, and they invest in initiatives across the full educational continuum.

In Arizona, where Latino students comprise the largest percentage of the K-12 public school population, the Foundation is implementing its Arizona Latino Student Success initiative focused on preparing all students — especially Latino students — for success in college and career. Through its Florida Regional Student Success Initiative, Helios is helping first generation, low-income and minority students from the state's large population centers in Miami, Orlando and Tampa achieve a postsecondary education.

### A dated system with no external access

The Helios team had a system they had been using for about 6 years, and after a while, it became clear that it wasn't meeting their functional requirements. "The system wasn't web-based which meant none of the program staff had any access from the field," says Linda Thompson, Senior Vice President and Chief Impact Officer. "Not only that, it was unwieldy, and most of our staff were intimidated and reluctant to use it. And, because it stored every record individually, meaningful reporting was difficult and sometimes not possible."

Linda and her team decided they needed to upgrade to something that was more user-friendly and capable of operating as a complete grants management system. "We needed something our team could easily access when they were out of the office. Something that could aggregate our data and be able to report on outcomes and results in a way that didn't require us to sift through each grant file one at a time. We wanted a system that was intuitive for our team to use."

### Taking the time to really listen

After getting input from other foundations and taking a look at the Idealware Consumers Guide to Grants Management Systems, Linda was able to narrow her search down to four systems. “The review process was a real eye-opener for us. Most of the sales reps we had in to demonstrate their system were okay, but I never felt they were listening to what we wanted. I even had trouble setting up calls or follow-up appointments.”

“SmartSimple, on the other hand, really seemed to hear what we were saying. They understood how we wanted to show our data. They were the most responsive to our requests and paid attention to what we hoped to get out of the platform. Any queries were responded to quickly. Plus, as a small organization, we were confident we wouldn’t get lost in a sea of other clients.”

SmartSimple and the Helios team decided to take a bit more time than originally planned for the implementation of their system. “We had to make some adjustments to our process, not because SmartSimple wanted us to, but in order to achieve the outcomes we wanted. We needed to sit down and revisit how we were managing and entering our data.”

Linda worked through several rounds of process changes and updates with the SmartSimple implementation team. When the project encountered a bump in the road, SmartSimple was quick to respond. “When I escalated a concern to the management team, the response was immediate. The project was reorganized and we received dedicated attention until everyone was comfortable that it was back on track.”

### Becoming more and more self-sufficient

One member of Linda’s team, Erika Morse, has been using SmartSimple Cloud since the system went live and has found that she enjoys doing much of the configuration work herself. “When I need to contact the support team, the responsiveness is great,” says Erika Morse, Grants Management Director. “One of my favorite things about SmartSimple Cloud is that I can make changes and set up features on my own. I’m not an IT person - my background is education - but the SmartSimple support team is really great at explaining how the system works. Because they really take the time to listen to what you want to do, it doesn’t take long to get new functions up and running.”



“I got system administration training a few months before we went live and since then I’ve been constantly adding new features to our system,” continues Erika. “I’ve discovered new processes and ways to bring other aspects of our organization into SmartSimple Cloud. For example, both our marketing and our policy research information was inaccessible to much of the staff and inconsistently maintained. But now we have it all in one place. Everyone can access the data from anywhere and run reports on whatever they choose. It’s great to be able to keep it all up to date so others can get what they need quickly and easily. I’ve simply incorporated the collection of the information into our process and made it all much more efficient.”

“If we were suddenly asked to run a report on how many open grants we have and how the funding is broken out, it would only take a few seconds to complete. Does someone need a contact list of our current grantees? Not a problem! It was so much more cumbersome maintaining basic data with our old system.”

“SmartSimple Cloud for Grants Management has definitely improved efficiency in terms of payments and approvals and getting grant agreements signed. There’s no more back and forth wondering whose desk a contract might be on, how long they’ve had it, or who is supposed to be reviewing it. Now I always know exactly who has what and for how long they’ve had it. It’s even easy to send a reminder to someone to get their part of the process completed to keep things moving smoothly.”

### Improved tracking equals increased organizational efficiency

“Our internal team feels much more confident about the accuracy of the numbers in our system and actually using those numbers for reports,” adds Linda. “We’ve gone from a system only four people use to a truly organizational tool. SmartSimple Cloud is ideal for increasing efficiencies, but it’s so much more than that. It’s built for tracking engagements, contracts, and users, making it absolutely invaluable for managing our grants and other activities.”

“People just love our system; it’s easy to access information from anywhere and it’s actually organized in a way that’s intuitive to our users,” says Linda. “It’s been pretty smooth sailing,” concludes Erika. “I’d recommend SmartSimple Cloud to anyone for two main reasons. First off, for someone with a non-IT background, it’s easy to manipulate the system, make changes on the fly and add new features. Secondly, I really appreciate how much everyone we’ve worked with at SmartSimple truly cares about their platform and their clients. They pay attention and actively listen to us when we call for assistance. They care that the product they build is effective.” ●

## Irving Harris Foundation



**How the Irving Harris Foundation elevated their customer support service offerings through a modernized Grants Management System.**

### At a Glance

Prior to switching to SmartSimple Cloud for Grants Management, Irving Harris Foundation had been steadily seeing their fees rise with their previous solution, Microedge GIFTS, yet these higher fees did not translate into a better customer experience. The Foundation wanted an improved, online solution for their expanding staff. GIFTS price points were unreasonable and their solutions were below average.

By moving to SmartSimple Cloud, Irving Harris Foundation experienced dramatic improvements in service delivery by opting for its Premium Support Services offering. The Foundation was also able to modernize their antiquated paper-based processes with automated workflows and realize significant efficiency gains with features such as online document signing.

**SmartSimple client since:** 2013

**Type of giving:** Family Foundation

**Dollars granted:** Between \$10-15 million annually

**Old system:** MicroEdge GIFTS

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)
- [Premium Support](#)

### Key pain points:

- Over-reliance on manual processes
- Limited functionality of an old and dated system
- No integration capabilities
- Declining customer support

### New system must-haves:

- Easy to use online application for grantees
- A true content management system
- More responsive customer support
- A central repository for data
- Easy file sharing capabilities

"The more we use the system the better the team here feels about SmartSimple Cloud. Everyone is finding the automated workflows much more efficient than our manual process ever was. Foundations are typically slow to get with the times, but now I feel like I'm way ahead of the curve."

**June Matayoshi**  
Grants Manager



Irving Harris Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About Irving Harris Foundation

Irving Harris Foundation is a small family foundation based in Chicago. They provide grants to not-for-profit organizations focused on enhancing early childhood, reproductive health & justice, arts & culture, Jewish culture and social justice.

Their mission is to enhance the quality of life for children, families and communities by advancing human potential, social justice, equality, creative experience and expression. They invest in initiatives that focus on the healthy social emotional development and well-being of young children and their families through community vitality and creative development.

### Increasing costs put pressure on the Foundation to find another solution

The team at Irving Harris Foundation had been using GIFTS since the early 1990s. "Back then, there were only two users, and since our grants were donor-advised there was no need for reviewers," says June Matayoshi, Grants Manager.

When GIFTS was purchased by Vista Equity Partners however, things began to really change. "Suddenly our fees were going up for no real reason we could see, and they were pushing us to go with GIFTS Online. They were still building the system and we could already see that it wouldn't be able to meet our needs."



With a wide range of grants management systems now available in the market, June and her colleagues decided to look around for an alternative. “We were seeing more and more foundations going online and we wanted to keep up with the times. We had an increase in program staff and things were getting unwieldy and more difficult to track. Everything was everywhere, coming in on paper, by fax and email.”

The Foundation brought in a consultant to help them sift through all available options and bring forward the grants management systems they wanted their team to look at. “We considered Fluxx, but many didn’t like how it looked, and FoundationConnect was much too complex for our needs. We looked at GIFTS Online again, and it was just under par. The switch would have been unreasonably expensive too.”

“SmartSimple Cloud had a clean, simple look, and that was a big draw for our staff. We were very excited by the potential we could see for us by choosing SmartSimple Cloud.”

### Moving to an online platform

The transition from a desktop and paper-based system to a completely automated, online platform took some time, and there were some challenges along the way. “We thought we’d just transfer our information to SmartSimple Cloud and go, but moving from paper to online takes a bit more work. Fortunately, the SmartSimple team found solutions for us to get the data we needed in the right format to eventually switch everything over to our new platform.”

“SmartSimple Cloud had a clean, simple look, and that was a big draw for our staff. We were very excited by the potential we could see for us by choosing SmartSimple Cloud.”

**June Matayoshi**  
Grants Manager

While the transfer of data didn’t go as smoothly as they would have liked, SmartSimple’s post-implementation support won the Irving Harris team over. “The move from implementation to support was excellent. We were really made to feel like we were starting a new relationship rather than just another business contract.

We decided to go with Premium Support Services as our support option and I have to say it’s priceless. We have an amazing Dedicated Support Representative who is always willing to help us with anything we need.”

### Extending system capabilities with integration paves the way to greater efficiencies

Irving Harris Foundation’s Dedicated Support Representative helped them find efficiencies through their automated workflows, as well as getting them set up to use Signority, an online document signing platform and one of many that integrate with SmartSimple Cloud. “The ability to integrate directly with an online document signing program has been a massive benefit to our overall process. We used to have to print, scan, fax, and email every contract, so Signority has been one of the biggest process improvements for us.”

“Signority means I can manage year-end much more effectively because contracts are sent back to us so quickly. Our team has managed to cut overall contract processing in half, saving a significant amount of time. The automated reminders are a huge advantage - no more having to chase people down to get their signatures.”

“The more we use the platform, the better the team here feels about SmartSimple Cloud. Everyone is finding the automated workflows much more efficient than our manual process ever was. Foundations are typically slow to get with the times, but now I feel like I’m way ahead of the curve. It’s hard to believe I ever managed all the work I had to do using paper documents and faxes. I would absolutely recommend SmartSimple Cloud to any organization stuck in a paper process rut.” ●





## Pohlad Family Foundation



**How Pohlad Family Foundation created a more secure, paperless Grants Management System.**

### At a Glance

The team at the Pohlad Foundation were using another grants management software platform, but recent changes within that company resulted in increased costs, slower response time for support requests and a much more rigid system structure.

"We were looking for a new online system that would work for our grants program, and ideally one that would also support our employee matching gift program so we could get rid of the paper-based, highly intensive process we were using," says Misha Dashevsky, Grants Manager at the Pohlad Foundation.

**SmartSimple client since:** 2012

**Type of giving:** Grants

**Old system:** Paper-based

**SmartSimple product/services:**

- SmartSimple Cloud for Grants Management

### Key pain points:

- A cumbersome paper-based grants process where all communications grants manager and grantee were physically mailed taking up too much time

### New system must-haves:

- A digitized platform where all data and documents were safely stored and secured



"I think SmartSimple has a solid understanding of what American private foundations need in an online solution."

**Misha Dashevsky**  
Grants Manager



Pohlad Family Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Grants Management >**

**Request a Demo >**

### About the Pohlad Foundation

Established in 1993 by Carl and Eloise Pohlad, The Pohlad Family Foundation is focused on supporting the needs of the Twin Cities community. Their family wanted to transition their good works to a more public effort, sharing their love of the Minneapolis/St. Paul region and building on their efforts to improve the quality of life in the region they call home.

### Selecting SmartSimple

Gina DiMaggio, Program Officer for Pohlad, was the lead in the selection process, "Our Account Manager, Todd Lapin, was very familiar with our former system, so he really understood the issues."

"At the time we were shopping for our new system," Gina continues, "the world of grants management software was exploding. The problem was that most vendors weren't particularly well established and we didn't want to spend the time and money investing in a company that might disappear the next day."

SmartSimple was not only well-established, their fee structure was reasonably priced. To be honest, some companies had what seemed to me to be artificially low prices, and while cost was a consideration, simply choosing the cheapest option just didn't make sense."

### Working with SmartSimple Cloud

"Our goal was to create a system that kept things simple," continues Gina. "In the beginning there was a bit of stress gathering all the appropriate information SmartSimple needed to build our solution, but fortunately we had people like



Quality Assurance Specialist Ciaran Donnelly, on our team. He was always quick to fix any issues we encountered during implementation and answered our questions in a way we could all understand."

"I have to be honest, when I was first introduced to SmartSimple Cloud, it seemed complex," adds Misha, who joined the team after the initial implementation. "The fact that it was so customizable and so flexible was a bit overwhelming at first, but once Gina trained me, I realized how much there was that was easy to use."

"It's also huge for us that the Support Team is so responsive," Misha continues, "for example, Yousif Elhakim spent a good 45 minutes on the phone with me when I needed to build a new automated workflow and needed a lot of guidance. He was very patient and helpful."

Plus, tools included in the system, such as the Community Portal, are a fantastic way for us to communicate directly with the entire SmartSimple team when we need assistance or simply have a question."



**"SmartSimple was not only well-established, their fee structure was reasonably priced."**

**Gina DiMaggio**

Program Officer

"[SmartSimple Cloud] has really streamlined our processes and has made our team more efficient and accountable," Gina adds. "Data storage is much better and it's so easy to access and provide information requests from our Program Officers. The edit view function gives me the ability to report on and return data related to any grant applications – it's very flexible!"



"The system also saves us a considerable amount of time managing our employee matching gift program," Gina says. "With the old paper system we spent an unbelievable amount of time mailing documents to non-profits and processing what was returned. Now, it takes a fraction of the time to respond to requests. Plus, it's a much easier system for our employees to use, with nowhere near the number of steps that used to be involved. Employees get replies to their queries quickly and we can pay out grants faster."

The Pohlad team also likes the fact that important documents for every grant in their system are stored online in a safe and secure environment. "We don't lose documents anymore. We are very confident that everything is kept organized right within the system," adds Gina.

"We did a survey of our users asking about their experience with the grants system, and the response was very positive – 80% said they were satisfied with [SmartSimple Cloud] and 70% said they had no problems using it," concludes Misha. "I think SmartSimple has a solid understanding of what American private foundations need in an online solution." ●

## Robins Foundation



**How Robins Foundation modernized their granting process for robust reporting.**

### At a Glance

The Robins Foundation had an entirely manual grant application process that was managed by the use of separate Excel spreadsheets. Understaffed and under-resourced, they decided to modernize and digitize their entire process through one central and unified platform. They not only needed a solution that made their grant application process more streamlined, but they also required something intuitive that would give them robust reporting capabilities.

SmartSimple provided them with a full service, end-to-end platform solution that was easy to manage and was adaptable to their evolving needs. Once Robins Foundation migrated their data over to SmartSimple Cloud for Grants Management, all staff were able to collaborate on one, unified platform, enabling everyone to have access to the same, real-time data vastly improving how efficiently the team worked. Robins' new system also helped streamline the application process by standardizing the method in which applications were collected. Overall, SmartSimple has helped Robins future proof their grants process by providing them with a grants management solution that can evolve and change as the foundation's needs and requirements change.

"SmartSimple helped us create a platform through an intuitive process without tech jargon, and that felt good. We were able to look around and play with our new system without messing anything up, and this made it easier to experiment and made everything very comfortable."

**Tracie Mooneyham**  
Program and Grants Manager



Robins Foundation is a SmartSimple Cloud user

**SmartSimple client since:** 2014

**Type of giving:** Grants

**Old system:** Paper and Excel spreadsheets

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- An outdated system requiring a digital overhaul to streamline, modernize, and future-proof the grant application process

### New system must-haves:

- An easy-to-use digital platform with robust reporting capabilities
- Clear channels for communication between the grants manager and grantee

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**Request a Demo >**

### About The Robins Foundation

The Robins Foundation is a Richmond, VA-based family foundation focused on elevating lower-income families and the communities they live in through educational advancement opportunities and resources. For the past 60 years of visionary philanthropy, they've supported and developed strong and strategic partnerships with organizations and projects that provide educational opportunities and resources for children 0-18. Their mission is to lead transformational change in the greater Richmond community by listening, learning and engaging through innovative philanthropy that inspires solutions to society's greatest challenges.

### An analog foundation with digital dreams

Although the Robins Foundation runs as a small operation, their need for a unified grants management platform was critical to creating a streamlined grant process. From the CEO to the office manager, all of their important documents were handwritten on paper. "There was nothing online, and as a foundation, we decided to transition to be more responsive and proactive. We found paper wasn't cutting it anymore," says Tracie Mooneyham, Program and Grants Manager.

They made efforts to enter into the digital age by moving paper copies to online programs like Pearl. Unfortunately, the program felt like it was no more than a “glorified spreadsheet.” Robins’ methods were out of date, and they needed a cohesive tracking and reporting system that worked to meet the growing needs of their partners and grant applicants.

### Too much scattered paperwork

The most prominent reason the Robins Foundation needed to digitize their process was time. The number of hours spent on hand processing grant applications and tracking their data left the team with little time to do much else. By not having a centralized database, multiple contributors working on multiple versions of a file made it difficult to organize, and to have up to date and trackable data to work with. Application proposals were submitted as emails, faxes, and sometimes even hand-delivered without RFIs. “There was no eligibility quiz at the time, so we were receiving about 150 applications per cycle at two cycles a year — that’s a lot for two people to manage.”



“We wanted a one-stop shop and build out from there to make it easier for the [grants] manager and grantee,” added Mooneyham. By modernizing and streamlining their application process with added information collected through eligibility quizzes, Robins could narrow down the number of applications and make sure they focused on Richmond-based applicants with specific information.

After doing intensive research, self-guided searches, and listening to sales pitches from a number of grants solution software providers, their search seemed fruitless until they came across SmartSimple Cloud as an option to meet their varied needs.

### A dream grants process becomes a reality

Working with SmartSimple, the Robins Foundation’s entire grants process was digitized and transitioned online. The move was immediately met with open arms. “After the first application went through, we looked for feedback, and everything was very positive,” says Mooneyham. The platform made it easy for the staff and applicants to navigate the new online system. Now, every user knew where to click, save, and type.

And since Robins Foundation had the platform to standardize how they received their applications, the entire grant application process became much more automated greatly reducing the need for manual intervention. “There was less of a workload on an already capacity-strapped program team, and we wanted to make the application process easy on both sides [grants managers and grantees], so everybody wins.”

Not only was their new platform streamlining their workflow process with high functionality, the general UX was also very intuitive and eye-catching. Mooneyham added that “something as simple as buttons have become a phenomenal thing [...] they’re appealing and make it easier to know where to go. You really can just click a button and trigger a domino effect where they [grantees] get notifications, I get notifications, and there’s an incredible capacity for making everything really easy.”

### No technology degree required — just curiosity

“The biggest thing that resonated with me was that you don’t have to have a tech background or be completely confident in your computer skills to use the system, so long as you have curiosity,” says Mooneyham. She added, “The technology enables you to make the changes you want to see.”

Coming from the opposite spectrum with no philanthropy background while taking on a technical role on the staff, Mooneyham was surprised how comfortable she became with the flexibility of the platform. “I had the ability and spark of knowing I can run a multi-user platform with different roles and access permissions.” By using SmartSimple’s intuitive platform, you don’t have to be a tech person to adapt to the system and thrive with its powerful benefits for your foundation.

### Relationship-based customer support

Building strong, lasting relationships are a cornerstone of SmartSimple’s philosophy. It drives the company’s desire to provide real solutions and tools foundations need to continue the good and authentic work they do in the world. Mooneyham loved the one-on-one conversations with our technical support team and added that “SmartSimple spoke with me in a comfortable, relational way to make my transfer into this technical role smooth. I was afraid to be that person with so many questions, but I was able to turn questions into real collaboration and focus on our community which is our strength. I really appreciate the level of personal customer service, it’s so important and so appreciated”. ●

## Child Development Institute



**How CDI is changing the landscape of children's mental health.**

### At a Glance

Child Development Institute's (CDI) spreadsheet-based administrative process needed a software solution to accommodate its Canada-wide expansion of mental health services. Not only did CDI need a way to consolidate and track all stages of their implementation and service delivery around the world, they also needed to maintain fidelity and create a support system for their affiliate offices across the country and beyond.

[Gen3](#) built a centralized system on SmartSimple Cloud for Research Grants Management that enabled CDI to collect and report data across all of their locations to best serve families and support internal and external stakeholders during all stages of program implementation.

**SmartSimple client since:** 2014

**Type of work:** Evidence-based children mental health services

**Current platform:** SmartSimple Cloud

**Previous platform:** Excel spreadsheets and Word Documents

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)

### Key challenges:

- Inefficient research data management
- Confined by a system that could not accommodate program expansion

### Gen3 Impact:

- Enabled CDI to structure and standardize the way it collects information at every stage of their process
- Implemented system optimized for effective collaboration and high fidelity exchange of data between stakeholders and families across all communities

"We're changing the landscape of how children's mental health is addressed, with Gen3 helping immensely in that process."

**Leena Augimeri**

Director, SNAP Scientific and Program Development



Child Development Institute is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

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### About CDI

CDI is an evidence-based, gender-specific intervention program with a proven track record in changing lives. CDI teaches children ages 6-11 and their families, how to stop and think before they act and make better choices "in the moment."

Child Development Institute (CDI), an accredited children's mental health agency based in Toronto, developed SNAP over 33 years ago as a response for at-risk children in conflict with the law. Since then, the SNAP program has grown and evolved into an internationally recognized and award-winning early intervention model.

### Spreadsheets creating a spread-thin administrative process

In 2014, CDI launched its 5-year international expansion project to reach 140 communities across Canada through localized partnerships. To date, CDI is currently meeting its national targets and have over 70 sites worldwide. Prior to this, tracking down data took precious administrative hours, creating a lag in communication between CDI and its teams.

While the SNAP program was effectively scaling on a national level, consistent and clear communication with both internal teams and external partners was critical. "Our data was in need of centralization through an innovative operational platform so that we could work more efficiently toward our ambitious goal," says Margaret Walsh, Manager, Research and Evaluation for CDI. "Gen3 helped change how we communicate our findings to licensed sites. We now have a platform to gather our data and best serve our families," adds Walsh.



### The need for a system to bring everything together

Before SmartSimple Cloud for Research Grants Management, CDI didn't have access to customizable software. "We wanted to develop a tool to track all stages of our program's processes, from pre-implementation to service delivery," says Walsh. CDI was looking for a reliable solution that spoke to all elements of their implementation work that included collecting and tracking activities both at CDI headquarters and across all affiliate sites. "We wanted a centralized solution that does everything but slice bread," says Adam Donato, Researcher, CDI.

When searching for systems, CDI had a limited scope. "We were looking specifically for case management, but in speaking with Gen3, we were able to expand and realize the possibility of incorporating everything else," says Walsh. These other elements included pre-implementation management, implementation management (training, consultation), fund management, press and media management, and staff management (research studies, awards, outreach).

**"Gen3 helped change how we communicate our findings to licensed sites. We now have a platform to gather our data and best serve our families."**

**Margaret Walsh**

Manager, Research and Evaluation for SNAP

### Working with technology to change the landscape of mental health

After working with the SmartSimple system, CDI has structured and standardized the way it collects information. The CDI pre-implementation team "loves" the system. "We now have a very organized way to track our data and build upon our expertise," says Walsh. The system has also provided built-in efficiencies in how the finance team tracks spending. "We've cut down on admin time by 50% — the whole staff has made their workflow more efficient," says Walsh. On the research side, CDI has been able to collect data in a structured and standardized way.

Clinicians can get real-time pre-treatment and post-treatment data, and with ad-hoc statistical analysis tools, CDI can focus on unique ways to further deliver its services in children's mental health. "We're changing the landscape of how children's mental health is addressed, with Gen3 helping immensely in that process," says Leena Augimeri, Director, SNAP Scientific and Program Development.

### Breaking new ground in mental health research

CDI is now able to strategize more effectively and inform the mental health field as a whole. "Once we've analyzed the data, it helps to inform implementation processes and most importantly treatment response," says Walsh. With their sights toward the future, CDI is focusing on refining and building a polished system to get to the core pieces they need to scale into a broader, international community. "We're looking to integrate machine learning to link the quality of the training to the ability to affect the outcome of a child, creating a wraparound method to suggest the best treatment approach," says Adam Donato. "We're creating a hive mind resource," adds Donato.

As SNAP scales to additional new communities, the SNAP team feels confident with its flexible system providing support every step of the way. "Gen3's support over the years has been wonderful and has helped us in our mission to transform the lives of children, youth and their families," says Walsh. "I can't imagine how we could manage everything in our work without Gen3," concludes Walsh. ●



## Genome Alberta



**How Genome Alberta enhanced their research grant reporting to maximize their funding impact.**

### At a Glance

Genome Alberta's grant funding impact reporting was getting lost in incomplete data gathered in different formats including Excel spreadsheets, Word documents, and PDFs. With data from various sources, it took this government funded research corporation a lot of time to gather information about their impact. SmartSimple delivered an all-in-one fully auditable solution that accommodated their nuanced funding structures while empowering them to create very granular ad-hoc impact reports to provide transparency and gain insight into their funding strategies.

#### SmartSimple client since: 2012

**Awards given:** >\$241M in genomics research since inception

**Old system:** Excel, Word, and PDF documents

#### SmartSimple product/services:

- [SmartSimple Cloud for Research Grants Management](#)

#### Key pain points:

- An inefficient data gathering process in different formats that didn't give real insight into grant funding impact

#### New system must-haves:

- A configurable and flexible system that can track grant funding impact and metrics and day to day operations

"We're grateful to have SmartSimple to quickly manage our implementation projects. They can easily scale with us and we intend to have our system around for some time."

#### Ryan Mercer

Research Program Manager



Genome Alberta is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About Genome Alberta

Founded in 2005, Genome Alberta is a nonprofit research corporation that funds and manages genomics research and partnerships. Funded by the province and the federal government of Canada, they support genomics solutions through funding efforts that advance the study of genomes through collaborations and partnerships. Some of their funding efforts are geared toward the improvement of disease prevention, diagnosis, treatment, technologies that assist science programs, and sustainable agricultural and environmental studies.

### Too many formats to pull data from

Genome Alberta's impact data gathering process was scattered and housed in a combination of Excel, Word documents, and PDFs. This created hours of wasted administrative time with little results when it came to developing a sustainable reporting strategy that maximized impact. "It was difficult to pull out project outputs from previous investments, and we needed something better put in place," says Ryan Mercer, Research Program Manager for Genome Alberta. Without the proper perspective of their funding efforts, it deeply affected their big-picture impact strategies.

### The search for the perfect system

When conducting a comprehensive review of other technologies, they were looking for a "perfect fit" to keep up with the unique way their operations were running. They chose SmartSimple Cloud as their flexible solution to track and report the complex funding and disbursement structures. "Other systems didn't allow for the flexibility that SmartSimple Cloud did."

### A simple solution for a complex process

Transparency is vital for a government-funded entity, and Genome Alberta was able to track and report on exactly where the funds were coming from, where they were dispersed, and how grantees and projects were effectively using the funds on a granular level. Mercer particularly connected with the MS word merge feature, "I can assign date ranges for a report, and it will pull a report in a Word template with all the relevant information to present to our constituents."

By utilizing SmartSimple Cloud's fully auditable system, "we were easily able to create reports to present to all our stakeholders, and I can get the most current view of the records within the system."

Using the flexibility of SmartSimple Cloud, they were able to configure a streamlined application intake system, an impact reporting system that created ad-hoc reports that included return on investment dashboards. Mercer also configured the system to create real-time reports to give insight into external and internal operations, "creating these dashboards and systems gave us a broader picture of our funding efforts and a holistic view with day to day reporting."

## "Other systems didn't allow for the flexibility that SmartSimple Cloud did."

**Ryan Mercer**

Research Program Manager

### A system that scales

When SmartSimple Cloud was first implemented, they configured it to serve as a project management tool to track granting activities, performance, and evaluate post-award programs. Administrators were empowered to delegate relevant data to different project managers to access only for their project. "We created a user guide for the project managers, and it was taken quite well," says Mercer. As their needs grew, the system was flexible to scale with them. They then configured a separate system for tracking corporate funding grants for a simplified workflow.

With 95 projects in their portfolio, 36 that are currently open and running, and 13 new projects coming in, Genome Alberta is growing fast. With the solutions and tools that SmartSimple Cloud provides, Mercer is able to streamline every activity and financial element in their project workflow with ease, "we're grateful to have SmartSimple to manage our implementation projects quickly. They can easily scale with us, and we intend to have our system around for some time." ●



## Harrington Discovery Institute



**Harrington Discovery Institute finds a grants management solution that evolves with its growing needs.**

### At a Glance

The Harrington Discovery Institute (HDI) was using a manual grants process that consisted of vast amounts of paper and numerous emails. There was no consistency in their applications or in their process, and the constant creation of spreadsheet after spreadsheet left them open to data transfer errors.

By moving to SmartSimple Cloud, HDI was able to automate not only their application process, but every other aspect of their granting cycle. They have found that having everything in SmartSimple Cloud has kept them organized, making it easier for grantees and reviewers to do their work. The HDI team can now also make changes to their system on their own.

**SmartSimple client since:** 2014

**Type of giving:** Research Grants

**Dollars granted:** \$3.5 million in 2016

**Old system:** Manual

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)
- [Premium Support](#)

### Key pain points:

- No consistency in applications
- Too much manual data entry
- Information spread out over numerous spreadsheets
- Difficult to find data quickly

### New system must-haves:

- User-friendly for external users
- Efficient workflows
- Ability to evolve as the organization grows
- Able to make system changes on their own



"Once we learned what the system was capable of, we realized how much it could do for us; not just for online applications, but in managing post-award activities. Having a system so configurable and easy to modify is immensely helpful."

**Mel Sanders**

Financial Analyst



Harrington Discovery Institute is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About Harrington Discovery Institute

The Harrington Discovery Institute at University Hospitals in Cleveland is part of The Harrington Project for Discovery & Development. This international initiative is dedicated to physician-scientists, with programs designed to enable innovative physician researchers to improve the range of medications available to patients. Harrington Discovery Institute physician-scientists are linked into a unique network of experts and resources that provide a high level of technical and commercial support.

### Swimming in a sea of paper and processes

Every part of the grant application process at HDI was done manually. "We went through a lot of printing and creating binders, and everything was sent and received through our email system," says Mel Sanders, Financial Analyst at HDI.

"Applicants were asked to complete grant requests using fillable PDFs, but there was no way to apply online. We really wanted to go as paperless as possible and use more electronic resources for things like reporting, because our current paper-based system just wasn't getting the job done. We were manually filling out spreadsheets and pulling information from a variety of resources when we were creating reports, so it wasn't unusual to have errors in our data."

"We decided we needed a proper grants management system," continues Mel. "We figured that, since it took the collective effort of three or four members of our team hours to process paper applications, an all-inclusive system

would pay for itself.”

“As a young organization, a prime concern was being able to find a system that could grow with us. In reality, we were actually looking for a partner, not just a software vendor. We didn’t want someone to just sweep in, build a system and then go on their way. We wanted to know how to manage the system and learn enough about how it works so we could make changes on our own.”

### The quest for a true grants management partner

One of HDI’s Program Analysts recommended checking out the Consumer’s Guide to Grants Management Systems produced by Idealware, and that’s how they found SmartSimple Cloud. “Coming from an entirely manual process, we had no idea how much a software system could do,” adds Mel. “SmartSimple’s demo was impressive. I was really struck by the amount of research done in advance, so the features showcased were ones that were of particular interest to us.”

HDI decided SmartSimple was the best system for them, not just based on the demo, but also on the abundantly positive feedback they heard from SmartSimple clients. “It sounded like a very intuitive system for those of us not very technically inclined, and it would be pretty easy to learn the basics. Plus, we were looking for an established company and the competitors didn’t seem to have the same breadth of experience as SmartSimple.”

**“It sounded like a very intuitive system for those of us not very technically inclined, and it would be pretty easy to learn the basics. Plus, we were looking for an established company and the competitors didn’t seem to have the same breadth of experience as SmartSimple.”**

**Mel Sanders**

Financial Analyst

“The team really took their time in creating our Statement of Work to make sure we truly understood the implementation process,” Mel continues. “We appreciated the time our Project Manager took to explain the workflows, and how ultimately our system would work for us.”

Mel and her colleagues found the SmartSimple staff to be highly responsive partners, always available to address concerns. The implementation team kept the project moving forward, ensuring all milestones were reached. HDI also discovered that SmartSimple Cloud could do so much more than they had anticipated. “Once we learned what the system was capable of, we realized how much it could do for us; not just for online applications, but in managing post-award activities. Having a system so configurable and easy to modify is immensely helpful.”



### New discoveries at every turn

“Everyone on the Support Team is wonderful. They never make us feel like we’re being rushed off the phone and ensure our questions are answered fully. We’re not IT people, but they’ve made using the system so easy for us!”

“SmartSimple Cloud for Research Grants Management is a powerful solution. It offers so many more opportunities to automate our activities than we had initially thought,” concludes Mel. “SmartSimple Cloud is actually changing how we operate and is making a positive impact on our entire operation. Before we were restricted in how much we could do because of our manual processes. Now, the sky’s the limit!” ●



## JDRF



**An over 80% approval rating for the entirely centralized SmartSimple Cloud solution for JDRF.**

### At a Glance

JDRF's team was using a combination of two custom-built systems and a shared e-grantmaking website, Proposal Central. While Proposal Central helped manage grant proposals, it didn't offer JDRF enough functionality. There was no ability to drill down into their data, no centralized repository for their granting activities and no in-depth reporting features.

By moving to SmartSimple Cloud, JDRF's data became intuitively organized for their entire user community. Now, all applicants, reviewers, and granting staff can do everything in one system. SmartSimple Cloud has reduced the volume of manual data entry required, practically eliminating administrative errors. The platform has also made it a cinch to track all their scientific data, and added a new level of comprehension to their entire reporting process, both for internal and external stakeholders.



"The team really listened when we talked about what we needed our system to do. They didn't offer a generic, out-of-the-box product; instead, they presented an adaptable, comprehensive solution that answered our specific needs. We saw SmartSimple as not just another vendor but a company that would be a good business partner in bringing JDRF's vision to fruition."

#### Sydney Yovic

Associate Vice President of Research Operations & Mission

**SmartSimple client since:** 2013

**Type of giving:** Research Grants

**Dollars managed:** \$80 million annually

**Old system:** ProposalCentral combined with two custom-built systems

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)
- [Premium Support](#)

#### Key pain points:

- No central data repository
- Lack of automation during pre and post-award reporting
- Too many errors due to excess manual data entry

#### New system must-haves

- A complete 360° view of our work
- Automated application and review processes
- Significantly reduce amount of manual work
- One central location for all awarding reports and applicant information



JDRF is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About JDRF

JDRF is the leading global funder of type 1 diabetes (T1D) research. JDRF collaborates with a wide spectrum of partners to pursue therapies with the potential to prevent, better treat, and eventually cure, T1D. JDRF-funded research has led to many landmark advances in T1D science, and is now in the exciting position of turning that research into real therapies that will make life-changing differences for those living with T1D.

Currently, several clinical trials are in the advanced stages of testing required before Federal Drug Administration (FDA) approvals can be sought. JDRF has a solid track record of funding research efficiently and effectively. Approximately 80 percent of what they spend goes directly to research and research-related education—among the highest percentages for charities nationwide.

### A band-aid solution that didn't stretch far enough

JDRF had cobbled together three different systems, which included a web-based proposal management system called Proposal Central, to manage their research grants management processes, but found it never really worked properly. "We needed a makeover," said Sydney Yovic, Associate Vice President of Research Operations & Mission.

"We had a one dimensional system and needed a four dimensional solution. We lacked any ability to drill down and provide comprehensive reports, metrics or meaningful analysis. Plus, we were spending a lot of money trying to get all three systems to talk to each other, eating up valuable time and resources. It was stale, dated, and no one liked working with it."

Among the other problems they were hoping to remedy included reducing the amount of manual data entry, decrease the time spent creating reports, and find a solution that could integrate with their financial system.

"We also had a massive amount of vitally important research data - including recent results from ongoing diabetes research projects - that none of our scientific staff could easily access. We manage upwards of 500 active research grants at any one time; that's a lot of information to be organized and tracked, but we had no accurate way to do that. That made it extremely difficult for our scientists to know what progress was being made on work we were funding."



### SmartSimple Software: a vendor who understands scientific research

"Through our Request for Proposal (RFP) process, we found that many solutions providers have experience with not-for-profits, but many lacked biomedical research expertise. What we needed was a partner who had a solid understanding of us and our needs."

"We saw products that were really flashy, but weren't capable of incorporating meaningful management processes common in research. SmartSimple Cloud offered a clean look that also had the right combination of features and functionality we needed to accomplish our goals."

"The people were ultimately what sold us on SmartSimple Cloud. The team really listened when we talked about what we needed our system to do. They didn't offer a generic, out-of-the-box product; instead, they presented an adaptable, comprehensive solution that answered our specific needs. We saw SmartSimple as not just another vendor but a company that would be a good business partner in bringing JDRF's vision to fruition."

"Research management can be quite nuanced based on the funding organization, but our SmartSimple implementation team took the time to learn and understand our processes. Their experience working with other large research funders provided reassurance during the scoping phase of our implementation. They also defined milestones for testing and training on our SmartSimple Cloud platform, delivering without fail on the configurations that we specified."

"Not only did SmartSimple team centralize our processes, they took the time to understand why we wanted to perform tasks a particular way. We now have an incredibly versatile system that will easily grow with us over the years."

### A solution that truly simplifies the research granting process

"Ad-hoc reporting is a huge benefit, and the role-based portals have greatly improved our ability to communicate with all our stakeholders. We're working so much more efficiently as an organization."

"Our SmartSimple Cloud platform takes our grants from Letter of Intent to the post-award stage, while effectively addressing the specific needs of each user. Whether internal staff, applicants or reviewers, they can categorize and track what they need. Having everything in one place has saved a ton of time not having to manually enter reams of data"

"SmartSimple Cloud's seamless integration with our financial system has made us virtually paperless. Reporting on our work has decreased, and this has meant a major reduction in the time spent preparing and distributing physical reports. Now, everyone can access them online through their own permissioned access portal."

JDRF happily reports that the overall rate of satisfaction from their users is 83% - a huge jump from where they were a few years ago. "Applicants find SmartSimple Cloud easy to use, and for those who frequently apply for research grants, they only need to enter their information once and, it's stored in their personal profile. Our reviewers have told us they find scoring applications much easier and the entire process is more straightforward and a lot less time-consuming."

"SmartSimple understands us and our needs. They believe in the work we do and how important it is to us and everyone living with diabetes. We're constantly striving to improve our users' experience, and SmartSimple shares that vision, always there to help us advance our mission and achieve success." ●

## Marine Institute of Ireland



**Reducing paper, centralizing granting processes and sharing knowledge all key for the Marine Institute of Ireland.**

### At a Glance

The Marine Institute was an entirely paper-based operation. Microsoft Access was okay for doing basic reporting, but not much else. Reams of paper were routinely shipped for both the application and review process, making it difficult to adhere to due dates. Because they also track all marine-based activities in Ireland, they needed a solution that offered better reporting and tracking capabilities, and a less cumbersome application process. With SmartSimple Cloud, they were not only able to automate all their processes, they were empowered to do much of the configuration work themselves. Permissioned user portals and high level security meant they could provide the access every member of their community required for their work.

"We've noticed a massive reduction in the amount of paper we produce since we so rarely need to print anything anymore. Everything is stored right in the system; reports that we would have had to create manually are now quickly created right in our SmartSimple Cloud platform. Plus, all our reports can be easily exported to other programs or posted to our website."

**Martina Maloney**  
Research Office

**SmartSimple client since:** 2009

**Type of giving:** Research Grants

**Dollars managed:** €6 million (approx. \$7.7 million USD)

**Old system:** Microsoft Access database management tool

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)

### Key pain points:

- No external reporting capabilities
- Applications were difficult to navigate
- No online application or review process
- Too much paper

### New system must-haves

- Extensive reporting functionality
- Including the ability to create ad-hoc reports
- Online application and review process
- Easy to access system from any computer



Marine Institute of Ireland is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About The Marine Institute of Ireland

The Marine Institute was set up under the Marine Institute Act of 1991. Their mandate is to undertake, coordinate, promote, and assist in marine research and development. They provide services that encourage economic development, create employment, and protect the marine environment. The Marine Institute is the state agency responsible for marine research, technology development and innovation in Ireland. They carry out environmental, fisheries, and aquaculture surveys and monitoring programs to meet Ireland's national and international legal requirements, while safeguarding Ireland's unique marine heritage.

### The inefficiencies of a paper-based process

The Marine Institute was entirely reliant on paper files for their application, review, and awarding processes. "It was an incredibly cumbersome process," says Martina Maloney, who works in the Research Office of the Marine Institute. "We did a massive amount of printing, especially for our evaluators. In reality, we only used our database for internal reporting. We desperately needed an automated solution."

"The other downside of using an entirely paper-based process for applications and reviews was that we were at the mercy of couriers and the postal services of different countries because our reviewers come from all over the world. It was hard for us to stick to firm due dates when we were dealing with packages that could have been picked up later than expected or took longer to deliver than anticipated."

### The search for a centralized solution

In 2007, The Marine Institute decided to take a deep dive into finding a research grants management system that could meet all their needs. “We didn’t just keep track of our own funding initiatives. Due to the nature of our mandate, we needed to be able to monitor and report on all marine research conducted by other agencies participating in marine-based activities, such as aquaculture, maritime shipping, seafood safety, fisheries, and ecosystems.”

“We wanted a system that would manage every research grant submission we received from application to final reporting. Our goal was to find a solution that would address a range of functionality, while being easily accessible to all internal and external stakeholders.”

With the help of an outside consultant, Martina’s team did a detailed requirements review to figure out exactly what the Institute needed. “This was an important and valuable exercise for us, providing the opportunity to explore what exactly our processes were, what templates we were using, and what was required for both internal and external users. We wanted to be sure we knew exactly what we wanted a new system to accomplish.”

**“It was immediately clear after seeing SmartSimple demonstrate their system capabilities for us that this was the only platform that could meet our needs.”**

**Martina Maloney**

Research Office

### A solution with something for everyone

“It was immediately clear after seeing SmartSimple demonstrate their system capabilities for us that this was the only platform that could meet our needs. We loved the fact we’d have the ability to do a lot of the configuration ourselves, and that SmartSimple Cloud could meet all our technical and functional requirements.”

Martina, her team, and their consultant worked with the SmartSimple Implementation Team. “We got into a productive routine, using the time between meetings to our advantage by getting our notes and questions together. This ensured that when we had our weekly meetings with SmartSimple, we were making the most of our time together.”

Once the Marine Institute’s system was up and running, they also found SmartSimple’s Community Support Team was a valuable resource whenever they needed help. “The ticketing system for Community Support Services is fantastic, and having the SmartSimple staff at the Dublin office available as an additional resource has been a huge asset.”

“We’ve noticed a massive reduction in the amount of paper we produce since we so rarely need to print anything anymore. Everything is stored right in the system; reports that we would have had to create manually are now quickly created right in our SmartSimple Cloud platform. Plus, all our reports can be easily exported to other programs or posted to our website.”

### Sharing knowledge and promoting transparency

“As the central repository of marine knowledge for Ireland, SmartSimple Cloud has significantly reduced the amount of time we spend responding to information requests from the public. Thanks to SmartSimple Cloud, people can simply access what they need right from our website using permissions and security access we control.”

“The SmartSimple Dublin team even helped us develop an engaging, interactive mapping feature for our website. This map offers visitors access to a tool that displays marine research being conducted in real time. It provides an additional level of transparency by identifying where our research grants are being used and what other marine research activities are going on all over Ireland, regardless of the funding program or agency. You can even follow the vessel and track grant-aided research surveys that have taken place on our research vessels, the R.V Celtic Explorer and R.V Celtic Voyager, and view a summary of the survey details.”



“SmartSimple is constantly evolving. Their regular platform upgrades ensure that new features and functionality are continually being added. The adaptability of SmartSimple Cloud for Research Grants Management is definitely a major advantage for us. We now have immediate access to a massive amount of data at the click of a button. I would absolutely recommend SmartSimple Cloud to other research granting organizations.” ●

## Massachusetts Life Sciences Center



**How MLSC built a Grants Management System without writing a single line of code.**

### At a Glance

Massachusetts Life Sciences Center (MLSC) was using a custom grants management system with very limited functionality. There was no ability to scale the system for new requirements without the developer doing extensive and costly programming work. It wasn't intuitive, and lacked essential security protocols. By moving to SmartSimple Cloud, a highly flexible platform, MLSC was able to build a system that had all of the original functionality. They also gained the ability to build new features at any time to meet the organization's increasingly complex requirements without adding a single line of code.

**SmartSimple client since:** 2015

**Dollars granted:** \$575 million to date

**Old system:** Custom-built system

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)

### Key pain points:

- No ability to make changes on their own
- No customer support
- Not user-friendly
- No automation

### New system must-haves:

- Ability to make modifications as needed
- Responsive customer support
- Robust reviewer portal

"There's no need to revamp your process to accommodate the [SmartSimple Cloud] software; instead, the software is modified to accommodate you."

**Ryan Mudawar**

Director of Academic and Workforce Programs



Massachusetts Life Sciences Center is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About Massachusetts Life Sciences Center

The Massachusetts Life Sciences Center (MLSC) is a \$1 billion public-private partnership with the mission of advancing the life sciences sector in Massachusetts. Their work includes creating jobs in the life sciences and supporting vital scientific research. The MLSC makes financial investments in public and private institutions that are advancing life sciences research, development and commercialization. To date, MLSC has invested more than \$575 million in state funding and invested in projects that have created thousands of new jobs across the state.

### Constrained by the limits of a custom system

MLSC needed a simple solution for their granting activities. "We contracted a one-person shop to quickly build a very basic custom system that would do specific, general tasks. At the time, we didn't have the time nor the manpower to shop around for a proper grants management system," says Ryan Mudawar, Director of Academic and Workforce Programs.

The MLSC team used the system for several years, but they discovered a custom system was limited and frustrating to use. "There was essentially no customer service since the system was built by one person with no staff. There was no way to update the program ourselves; we had no control over the design or the ability to make any modifications. Even if we just wanted a minor change on an application - such as adding a comma - we'd have to email the developer, explain what the issue was, and wait for him to respond."

"Not only was the entire process incredibly time-consuming, we had to pay every time we wanted something changed no matter how small. On top of that, the system wasn't reliable. We were plagued by technical glitches, and every year it was something new. Both our internal and external users experienced problems; documents wouldn't save, data wouldn't upload, and application details were not displayed in a neat or organized manner. Our reviewers were



constantly frustrated with content being lost, not saving, and having the system crash on them.”

MLSC’s old system also lacked connectivity, and if a new portal was needed it was simply added in with no real consistency. “Applicants didn’t even have to enter passwords, and internal staff had to share administrative credentials to access the portal.”

### Looking for a more complete, robust solution

Ryan and his team decided it was time to look for a new system. They needed something that was more stable and reliable. They wanted a system where they had the ability to make their own changes in-house. “The challenge was that we knew getting an off-the-shelf system wouldn’t be able to do everything we wanted. While our custom program was really bare bones and basically did what we needed, it was not user-friendly.”

Ryan hired a consultant to help him and his team research what other options were available, as well as identify the one that would be the best fit for MLSC. “Believe it or not, some of the vendors we came across couldn’t even do basic tasks such as providing applications in printable PDF format, so it was great to have someone whose sole purpose was to facilitate the outreach and RFP process.”

### Discovering the nearly limitless options of a configurable platform

After a thorough review, MLSC chose SmartSimple Cloud. Different from their original custom software system, SmartSimple Cloud is a configurable platform that offers unparalleled flexibility. Clients have the freedom to make changes or add new functionality that fits their needs. And, with a platform like SmartSimple Cloud, it can all be done without adding a single line of computer code.

Organizations of all sizes and scopes can re-create their own unique process. There’s no need to revamp your process to accommodate the software; instead, the software is modified to accommodate you.

“I have to admit that, at first, we were a little skeptical. The SmartSimple team seemed so confident they could provide everything we needed and more. We were particularly concerned about our internship program because it has a very unique application and vetting process. But none of the other vendors we saw could meet or commit to our needs aside from SmartSimple, the choice was obvious.”

**“It’s so much cleaner and more user-friendly than our old custom system. Everyone is also much more comfortable now that we have a proper login process.”**

**Ryan Mudawar**

Director of Academic and Workforce Programs

### A new sense of freedom and flexibility with SmartSimple

As a configured rather than a custom system, SmartSimple Cloud provided something new that Ryan hadn’t seen in software before. “Having the ability to configure our own applications and use the review manager tool to efficiently assign reviews in bulk has been a great benefit for us. And being able to do these and other system modifications whenever we need is fantastic. We would never have to ‘live with’ something we didn’t like or want just because it was easier to deal with it then try to get it changed.”

The implementation of MLSC’s system went very well. Ryan and his team liked the SmartSimple approach, “They have something called a Task Tracker that documents and formalizes every request that we submit or change that we ask for, so everything was tracked and it kept everyone fully organized. At any time I could review the conversation thread to see exactly what changes were made and why.”

Ryan reports that their SmartSimple Cloud platform has been a success. “It’s so much cleaner and more user-friendly than our old custom system. Everyone is also much more comfortable now that we have a proper login process. Applicants and reviewers appreciate getting emails directly from SmartSimple Cloud and the ability to store applications and reviews in draft form, logging back into the system to complete their work as they need.”

His team has also had good success with SmartSimple’s Community Support team, “The Community Support team is amazing. They’re very responsive, always able to reply to requests in a short time frame. They’re also great at explaining what they’ve done and helped us understand how we can replicate changes ourselves in the future.” ●

## Saskatchewan Health Research Foundation



**How SHRF created a grants management platform that simplified their review process with robust data gathering capabilities.**

### At a Glance

SHRF was using Microsoft Access to manage their data, but found it was not particularly user-friendly. Specifically, they found accessing data and reporting a challenge. Their previous system had been limited to data entry for applications and contacts, and they really wanted the ability to save information on their review committee process.

“SmartSimple Cloud provided well integrated, cross-functional data access and an intuitive reporting module that is accurate, and it’s easy to modify the parameters of a report on the fly”

**Shaz Azam**  
Director of Finance

**SmartSimple client since:** 2013

**Type of giving:** Research Grants

**Old system:** Microsoft Access

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)
- [Premium Support](#)

### Key pain points:

- Non-user friendly system that had limited access to data to track and report on

### New system must-haves

- A true, all-in-one solution that has cross-functional data access
- An intuitive reporting module that is accurate



Saskatchewan Health Research Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About The Saskatchewan Health Research Foundation

The Saskatchewan Health Research Foundation (SHRF) is the provincial agency responsible for funding, facilitating and promoting innovative, collaborative health research in Saskatchewan.

SHRF works as a catalyst, driver, and leader to:

- Build and broaden the province’s research capacity
- Expedite the production and sharing of knowledge
- Build and broaden the province’s research capacity
- Increase stakeholder engagement
- Generate new and diverse funding partnerships
- Measure the impact of health research on our Saskatchewan communities

### Selecting SmartSimple

SHRF were initially attracted to SmartSimple as a Canadian-based service provider that could supply a true all-in-one solution. They discovered the kind of expertise and research industry knowledge SmartSimple had at its finger tips would be invaluable to them.

“SmartSimple Cloud provided well integrated, cross-functional data access and an intuitive reporting module that is accurate, and it’s easy to modify the parameters of a report on the fly,” says Shaz Azam, Director of Finance for SHRF.

### Working with SmartSimple

"We had a great working relationship with SmartSimple from start to finish," continues Shaz. "This is a testament to the competence, responsiveness and professionalism of the SmartSimple team."

After working with their new system, SHRF employees discovered increased efficiency, eliminating a lot of unnecessary extra work.

Specific features they found particularly helpful were:

- Being able to assign applications to review committee members without having to do a massive mail out
- Applicant assessments submitted through the system meant SHRF no longer had to organize and send to the correct committee members; it was done automatically
- The ability to edit the review forms to keep them anonymous, and upload them to the application



**"We had a great working relationship with SmartSimple from start to finish. This is a testament to the competence, responsiveness and professionalism of the SmartSimple team."**

**Shaz Azam**

Director of Finance

to give to the researcher

After implementation, Karen Glazebrook, Director of Funding Programs sent a survey to their 2014-2015 researchers, supervisors and university research facilitators to get their feedback. The response was overwhelmingly positive. Users found the system easy to use, had a great look and feel, and commended SHRF on the new online application process. "Users said the online application section was very clear and had better instructions than just about any other website they'd used. SmartSimple reduced the anxiety around completing their applications correctly," adds Shaz.

"SmartSimple Cloud is an intuitive system with lots of flexibility. We think other organizations would really benefit from the effectiveness and efficiency. It's great to know you're working with a team of professionals that will patiently work with you to make your vision a reality," concludes Shaz. ●

## Science Foundation Ireland



**How Science Foundation Ireland provided an easy-to-use platform for all users with a built-in messaging system and robust track and reporting capabilities.**

### At a Glance

Science Foundation Ireland (SFI) had been using a custom system from the start that never really worked. External users called frequently for assistance and the SFI team would often just tell them to email their submissions rather than spend hours trying to sort out problems. They wanted a system that was completely intuitive for everyone to use no matter how infrequently they accessed it. With SmartSimple Cloud, SFI found a solution that was not only easy to use, it was able to do so much more than just accept applications. For the first time, they were able to centralize all their tracking and reporting in the same system that stored all applications and reviewer notes. The number of calls from applicants was reduced drastically and they no longer needed to use email as a workaround.

**SmartSimple client since:** 2009

**Type of giving:** Research Grants

**Dollars managed:** €460 million  
(Approx. \$501 million USD)

**Old system:** Custom

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)
- [Premium Support](#)

### Key pain points:

- Difficult to use
- Never worked properly
- Badly structured
- Not adequately administered by vendor

### New system must-haves

- Centralized system
- Intuitive to navigate even for occasional users
- No excessive training required to access



"We could see functionality that was emerging and how flexible the [grants management] system was. It was clear to us that SmartSimple's promises would really be delivered on."

**Donal Keane**  
COO



Science Foundation Ireland is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About Science Foundation Ireland

Founded in 2001, Science Foundation Ireland (SFI) is the national foundation for investment in scientific and engineering research. SFI invests in academic researchers and research teams who are most likely to generate new knowledge, leading edge technologies and competitive enterprises in the fields of science, technology, engineering and maths (STEM). The Foundation also promotes and supports the study of, education in, and engagement with STEM and promotes an awareness and understanding of the value of STEM to society and, in particular, to the growth of the economy.

### Rapidly outgrowing their old system

For their first five years of operation, Science Foundation Ireland (SFI) had no formal system in place for the creation, submission, reporting, tracking and awarding of research grants. "We did have a system built for us but it never really did what we wanted it to do," says Donal Keane, COO of SFI. "We have a lot of people who use the system only once in awhile, and every time they went to use it, they'd wind up calling us for help. Since it was so difficult to sort out problems, we'd usually just give up and have people email us their applications or grant reviews."

The lack of usability became a bigger issue as time went on and the foundation grew from 11 awards in their first year to several hundred in subsequent years. "At any given time, we're managing hundreds of millions of Euros to be allocated between about 600 active awards."

"We needed a system that was reflective of a foundation that was growing. The biggest problem was that the system we were trying to use wasn't web-based, so every time we put out a call, applications would need to be downloaded to the system and then uploaded again for our researchers; not exactly efficient or state-of-the-art."

### An intuitive solution to meet their users' needs

Donal and his team went in search of a solution that would accommodate SFI's evolving needs. "The main thing we were looking for was a system that was intuitive to use. We have a number of people who might only ever access the system occasionally or even just need to use it once to apply for, or review, a specific research grant. We didn't want to have to provide an instruction manual or have our staff on call 24/7 to lead applicants and reviewers by the hand through the entire process."



SFI's first impression of SmartSimple Cloud was extremely positive. "SmartSimple definitely had the most flexible platform on the market. The competition only offered 'out of the box' solutions, while SmartSimple's presentation showed us not only the functionality of their software, but the passion and commitment to shaping the system we wanted. It was very clear what SmartSimple would be able to do for us."

"From the very early stages of the implementation process, we could see the broad scope of functionality that was emerging, and how accessible this solution was going to be for all our users."

While their competitors seemed to require us to employ a virtual in-house army to manage and support their systems, SmartSimple takes responsibility for the upkeep of their platform. There was no way we could ever staff the resources we would have needed to use one of their competitors."

### The added benefits of Premium Support Services

Recently, SFI added Premium Support Services to their service package. "Our system quite literally needs to be up and running all day, every day. Multiple departments at SFI use SmartSimple Cloud and our applicants and reviewers access the system at all hours of the day and night. Having access to a Dedicated Support Representative (DSR) with intimate knowledge of our entire system is invaluable to keeping everything running smoothly."

**"SmartSimple definitely had the most flexible platform on the market. The competition only offered 'out of the box' solutions, while SmartSimple's presentation showed us not only the functionality of their software, but the passion and commitment to shaping the system we wanted."**

**Donal Keane**  
COO

"We manage absolutely everything through our SmartSimple Cloud system, so Premium Support Services has been a perfect complement to our system. Our DSR helps us with anything we need, and having regular calls with the Director of Customer Experience has helped us with things like understanding how new upgrade features can be put to use to enhance our system. Our team gets excited about upgrades because they know they will get additional insight on features and how to integrate new functionality."

"SmartSimple Cloud has massively improved practically every department at SFI. Everything that relates to granting is done in the system, so we can manage calls for new proposals, administer review panel meetings, distribute awards and track them over their lifetime through a range of reporting options. We don't use paper for anything anymore. Virtually everything is done through SmartSimple Cloud. Our system even integrates with our accounting software so reviewers can submit expenses directly through their own portals and be reimbursed almost immediately. SmartSimple Cloud also offers the ultimate in transparency so we can easily share all our work with our stakeholders."

"Having a fully integrated system that joins departments, processes, and programs across global partnerships gives us the ability to do the live, real-time budgeting that is critical to our research granting model. We're always looking for new ways we can use SmartSimple Cloud to automate even more of our processes." ●



## SickKids Foundation



**How the SickKids Foundation built a grants management system that provided in-depth insight into their community impact.**

### At a Glance

The SickKids Foundation's National Grants Team had big organizational challenges in their grants management system. Their small number of dedicated program staff were inundated with a burdensome, outdated grant application process, and the data they pulled from templates yielded incomplete data that limited impact reporting. SmartSimple Cloud for Research Grants Management assisted them in updating their entire application process in one centralized location. Their new grants management system enabled them to work more efficiently and provided them with in-depth and powerful tracking and reporting capabilities that gave more insight into their grant researcher work and community impact.

**SmartSimple client since:** 2016

**Type of giving:** Grants

**Dollars managed:** \$1.8 million per grant cycle

**Old system:** Outdated paper-based system

**SmartSimple product/services:**

- [SmartSimple Cloud for Research Grants Management](#)

### Key pain points:

- Overpaying for a product that didn't facilitate impact reporting
- Product wasn't addressing their needs as an organization

### New system must-haves

- Wanted an online and cost-effective grants management system that could accommodate their workflow process



"I love that SmartSimple is an innovative company. The senior management is very in tune with the clients, and it doesn't feel like all sales, all the time."

**Pam Gilliland**

Granting and Hospital Relations Manager



SickKids Foundation is a SmartSimple Cloud user

**Learn more about SmartSimple Cloud for Research Grants Management >**

**Request a Demo >**

### About the SickKids Foundation

As a leader in the not-for-profit sector, SickKids Foundation raises funds on behalf of The Hospital for Sick Children - one of the world's foremost paediatric health-care institutions. SickKids Foundation is the largest charitable funder of child health research, learning and care in Canada. Established in 1972, the SickKids Foundation was built upon the leadership of SickKids in helping children across Canada and has funded more than \$80 million in grants across the country for children's health through their National Grants Program.

Their awards focus on supporting well-trained researchers across the country who are working to address the most pressing childhood diseases and conditions. They also work to bring together families, researchers, clinicians, and community organizations for medical presentations and family-oriented discussions. While their grant funding is only a small part of the vast lineage of the incredible work that SickKids has provided, it has made a significant impact on children's health and the medical industry.

### Too much time in data entry

The SickKids Grants Team was utilizing a grants management system that was timeconsuming, and wasn't yielding great outcomes for all the invested effort. "We were literally getting proposals in by PDFs and we had to enlist volunteers to do hours of data entry," says Pam Gilliland, Granting and Hospital Relations Manager of the SickKids Foundation. Their cumbersome process was getting stuck at the administrative level, and it was difficult to quantify program impact.

To make matters worse, they were overpaying for their current system, "The maintenance fees were relentless, so we couldn't afford the online module," and the modules themselves made for a complicated workflow. Their application

process also didn't provide in-depth impact reporting since their templates only offered bare-bone information making for incomplete data.

### The search for a solution

Needing a significant change in their application process, the Foundation Grants Team looked for an online platform that was cost-effective and didn't require a degree in technology to set up. They needed an online platform that could streamline and simplify their expansive grant application process. "We get up to 100 applications every cycle from applicants all across Canada."

Pam and her team needed a solution that gave them the powerful functionality that ensured robust reporting, "We wanted to be able to manage and dig deeper into the applications that we were receiving," as Pam states. They appreciated the transparency in pricing from SmartSimple's sales team and decided on working with SmartSimple Cloud because the software met their workflow needs and expectations.

### A grants management system that put all the pieces together

After working with SmartSimple's implementation team in person, the changes in process were met with positivity. "I was amazed that we could start monitoring the grant requests that people were creating," Pam says, "the applications and their deadline dates we could see two months out and see what grant activities were taking place," she continued.

With SmartSimple Cloud's powerful grant management tools, Pam and her team were able to get a broader perspective of their work instead of playing catch up with paperwork, "I could get a head start in preparing and assigning reviewers to applications. "We no longer have any data entry, and with an updated system, there were fewer mistakes in processing data into the system."

**"The support has been great, and they're helping us all the time to make it better. It's been very manageable, even without going through our own IT department."**

**Pam Gilliland**

Granting and Hospital Relations Manager

With SmartSimple Cloud, old processes were shed, and new ones welcomed with open arms. "Having a head start on the peer review analysis has been amazing" Pam says. "Deadline day used to be the day people would send their PDFs, and that's when we'd open the documents. Now we see beforehand what kind of applications we're getting and what expertise we need. We used to sit down with a paper checklist which took forever. Now we don't have to do that anymore. When applicants fill out the application, they have to fulfill our requirements and we can easily see the type of expertise we will require from our peer reviewers."

### High focus on high impact

The transition to SmartSimple Cloud for Research Grants Management was an extensive process to ensure user comfort and confidence. "There's only two of us on the Grant's Team that use the database and neither of us are tech-savvy. We spend a lot of time with SmartSimple's support team, and they're very responsive." Says Pam. "The support has been great, and they're helping us all the time to make it better. It's been very manageable, even without going through our own IT department."

Now with all of the time they've saved with their new system, the SickKids Foundation can focus on continued support for their community. "We're really starting to focus on impact and showcasing our awardees," says Pam. "With the freed up time, I've managed to highlight and focus on our grantees, and we've created profiles, bios and web pages following their careers. I'm able to pull this information from the system and we can highlight the impact our grants are making."

Pam is happy about the capabilities the SmartSimple Cloud platform has already delivered and is looking forward to the future. "We're going to be able to pull impact data and statistics much easier now, and see what our researchers are accomplishing." ●



For any inquiries, please contact us at [info@smartsimple.com](mailto:info@smartsimple.com)

If you would like to request a demo, you can reach us at [sales@smartsimple.com](mailto:sales@smartsimple.com)



SmartSimple is an Advanced Technology Partner in the Amazon Web Services Partner Program (APN). Amazon Web Services (AWS) is a secure cloud services platform, offering compute power, database storage, content delivery and other functionality to help businesses scale and grow. SmartSimple software integrates the technological capabilities AWS provides including networking, database, storage, analytics and more.

