

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

Request a demo and learn more about SmartSimple Cloud for Grants Management at www.smartsimple.com

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.”

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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.” ●