Universities Canada

Universities Canada. Universités 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

smartsimple CLOUD | **Scholarship Management**

Universities Canda is a SmartSimple Cloud user

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

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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

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."

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> 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." ●