



## New York State Interest on Lawyer Account Fund (IOLA)



The IOLA Fund of the State of New York utilizes SmartSimple Cloud for Grants Management

### At a glance

Since 2018, the New York State Interest on Lawyer Account Fund ("IOLA") has been a dedicated SmartSimple client. They manage government grants amounting to \$50 million annually, transitioning from a mix of Excel spreadsheets, Google Sheets, and shared drives to the SmartSimple Cloud solution for Grants Management. Their main challenge was reporting, which they have effectively addressed with SmartSimple Cloud, making their processes more time and cost-efficient. IOLA needed a system that was paperless, centralized and with a grantee portal for reporting and contact management.

**Request a demo and learn more about SmartSimple Cloud for Grants Management at [smartsimple.com](https://smartsimple.com)**

**SmartSimple client since:** 2018

**Type of giving:** Government grants

**Old system:** Manual process of Excel spreadsheets, Google sheets and shared drive applications

**Dollars managed:** \$50million/year

**SmartSimple Cloud solution being used:** SmartSimple Cloud for Grants Management

### About IOLA

The New York State Interest on Lawyer Account Fund ("IOLA") is a government agency with a mission to support qualified non-profit organizations providing civil legal representation to eligible clients and improving the administration of justice in New York State. Established in 1983, IOLA is governed by a fifteen-member Board of Trustees and operated by a staff of nine full-time employees in New York City.

### Challenges faced before choosing SmartSimple Cloud

Before implementing SmartSimple Cloud in 2018, IOLA faced substantial challenges. Its duty to administer grants to New York State civil legal aid providers demanded meticulous tracking, data collection, analysis, and communication. However, it lacked a streamlined system. Operations relied on a disjointed web of Excel trackers, Google Sheets, hard copy folders, and email reports, necessitating external consultants to validate, approve, process, aggregate, and analyze data.

IOLA envisioned a centralized online system for its grant-related business intelligence, encompassing application data, grant budgets, grantee contact information, communications, payment details, site visit notes, and quantitative data. Accessibility and configurability were paramount.

### Selecting SmartSimple Cloud

NYS IOLA Fund management describes the implementation process as a transformative journey. *"The SmartSimple team exhibited unwavering commitment, dedicating time and energy to understanding IOLA's unique business processes and needs. The 'Discovery' process, in particular, was enlightening, allowing IOLA to critically assess its requirements. The team's proposals and solutions were invaluable, resulting in a professionally managed project that was launched on time to great success."*

**“We are now able to do all data reporting and analysis in-house. This not only saves us thousands of dollars a year, but it allows IOLA to quickly and efficiently respond to data inquiries, which is essential as a government agency”**

**NYS IOLA Fund management**

## Benefits of choosing SmartSimple Cloud

- **Efficiency gains and features:** By opting for SmartSimple Cloud, IOLA reaped a number of efficiency benefits, notably in data reporting and analysis. The capability to manage these tasks in-house has led to substantial annual cost savings, amounting to thousands of dollars. The grantee reporting functionality has revolutionized quarterly reporting, making it significantly less burdensome. Additionally, the centralized system has seamlessly streamlined the tracking of grantee payments.
- **Feedback from staff and grantees:** The advantages of SmartSimple Cloud have not gone unnoticed by grantees. They particularly value the ease of accessing contract documents, historic submissions, and accessing payment information through the platform.
- **Mitigating challenges with ease:** During the challenges posed by the pandemic, IOLA seamlessly adapted its grant review process to a remote-friendly model, all thanks to SmartSimple Cloud's adaptability. This ensured that operations remained flexible and continued uninterrupted.

## Expanding initiatives with SmartSimple Cloud

IOLA collaborated with the SmartSimple team to extend their instance, incorporating grant reporting for the New York State Unified Court System's Judiciary Civil Legal Services (JCLS) Grant program. IOLA's decision to expand its SmartSimple instance is yielding substantial benefits. This strategic move has resulted in a single sign-on for grantees to access reporting for two state contracts, boasting numerous shared questions and features. This not only delivers cost-savings for New York State but also significantly enhances the reporting capabilities of JCLS.

**“Grantee reporting in SmartSimple has certainly made the biggest difference to our daily operations. The ease of reporting for grantees and the ease of review for IOLA staff makes each quarter less onerous. In addition, having a centralized place to track all grantee payment details (300+ a year) makes our internal operations much more seamless.”**

**NYS IOLA Fund management**

## Working with SmartSimple

NYS IOLA Fund management has expressed that its experience working with SmartSimple has been exceptional. *“SmartSimple personnel's deep understanding of IOLA's business and pain points facilitated the implementation of a system that addresses diverse application requirements. The system's flexibility, coupled with ongoing access to knowledgeable and helpful SmartSimple personnel, made the implementation process seamless.”*

**“We've recommended SmartSimple to other New York State agencies, as well as IOLTA programs throughout the US. The software is fantastic! We are glad to have empowered IOLA to revolutionize its grant management processes, resulting in efficiency, cost savings, and enhanced user experience.”**

**NYS IOLA Fund management**

*The NYS IOLA Fund was not paid nor received any benefit in exchange for this endorsement.*