

# The Chicago Community Trust

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## THE CHICAGO COMMUNITY TRUST

AND AFFILIATES

### About The Chicago Community Trust

The Chicago Community Trust is a community foundation dedicated to improving the Chicago region through strategic grant making, civic engagement and inspiring philanthropy. They serve non-profit organizations working to make a difference, helping their bold vision to create lasting community change. The Trust brings together local businesses, governments and organizations to solve pressing challenges. By connecting thoughtful donors with smart solutions, they leverage collective knowledge, creativity and resources to make a strong, positive impact on the lives of everyone in the region.

### The Challenge

The team at The Chicago Community Trust was using another grants management system, but it didn't completely meet their needs. "The online application function was good, but we needed a system that did more than just accept applications," said Sandy Phelps, Director of Grants Management at The Chicago Community Trust. "Ultimately, what we wanted was a better experience for our entire grant recipient community."

The Trust wanted the whole granting process to go more quickly, with every step of the process contained in one place – revisions, requests and reporting – so their Program Officers didn't need to go outside the system to complete their work. "We were looking for something that was easy to use, where applicants didn't need to re-enter their information every time they applied for a new grant. Our old system involved a lot of scrolling through pages and pages of text. We wanted a system that sorted the information in a much more concise manner," adds Sandy.

### Selecting SmartSimple

The Trust brought an outside consultant on board to help the team select their new partner. "I strongly recommend using a consultant when choosing a system," continues Sandy. "She first helped us define our requirements and grant process improvements as part of the selection process. A short list of companies we wanted to consider was created, and she made sure that the right questions were asked during the demonstrations."

Among those short listed was SmartSimple. Sandy had first heard of the company at the Grants Managers Network annual conference a few years prior, where she met Todd Lapin, SmartSimple's Director of Strategic Accounts. "Todd was very passionate about the product and the company, and he presented a great overview of the system's capabilities," says Sandy.

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

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## Working with SmartSimple

Sandy points to the great people on her implementation team as the key to the project's overall success. "Having a dedicated team and regular meetings to review the work, ensuring we were accurately tracking our progress was great," says Sandy. "The personal contact provided an open dialogue so we knew what was coming up and could immediately address any issues or concerns. In particular, our Relationship Manager, Brad Robertson, and Bob Longworth, our Systems Solution Architect, made sure everything happened on schedule, and came up with truly viable solutions for every aspect of our system."

Thanks to SmartSimple, everything now runs more smoothly at The Trust. "The system saves our grants management staff a ton of time!" says Sandy. "We're not pushing as much paper as we used to, and we don't need to print as much as in the past. Being able to communicate with everyone from within one system and track all our activities in one spot has definitely improved efficiency. Plus, being able to access everything from our tablets makes life a lot easier for staff going out on site visits. We recently surveyed our user community, and they gave SmartSimple a 95% approval rating. It's a huge benefit that applicants no longer have to enter all of their information each and every time they want to apply for a grant. Everything is stored in their user profiles and it saves a ton of time."

If they had to pick one feature they like the best? "The organization profile is a great feature for applicants for sure, but I'd have to say the integration with the Signority electronic signature tool would be the feature we like the most," continues Sandy. "This saves both our grants management staff and our grant recipients a tremendous amount of time; no more needing to generate a lot of paper, run around gathering signatures, finding envelopes or paying for postage. Everything is quickly and easily done right online."

"I would absolutely recommend SmartSimple to anyone looking for a grants management system," concludes Sandy. "Our experience was extremely positive; it's a great company with great people. The system meets our needs and the support we receive is excellent. Everyone is wonderful to work with and the platform is intuitive and easy to navigate for our grant recipients, our staff and our entire community."

## About SmartSimple

SmartSimple isn't just software. It's a cloud-based solution that streamlines the administration of your entire grants management process. Completely personalizable, endlessly configurable, and at a price that reflects only what you actually use, SmartSimple puts the control of your system in your hands.

To learn more, visit [www.smartsimple.com](http://www.smartsimple.com) and request a demo, email us at [sales@smartsimple.com](mailto:sales@smartsimple.com), or call us, toll-free, at 1-866-239-0991.