



## Bringing true collaboration to Helios Education Foundation with SmartSimple

### Synopsis

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 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.

### Key Stats

**Client Name:** Helios Education Foundation

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**Old System:** Outdated database-type product stored on in-house server

**Key Pain Points:** No remote access, difficult to pull out data, no proper tracking system for documentation and no intuitive reporting option

**New System Must-Haves:** Accessible outside the office, web-based, complete program tracking and robust reporting features



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Linda Thompson, Senior Vice President and Chief Impact Officer

## 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."

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Helios is hosted on  
Amazon Web Services

## Becoming more and more self-sufficient

One member of Linda's team, Erika Morse, has been using SmartSimple 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 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 our SmartSimple system. 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 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."

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## 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. The SmartSimple platform 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 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.”



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## About SmartSimple

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

## About GMS360°

SmartSimple GMS360° is a robust, end-to-end grants management solution that makes it easy for foundations to track, manage and report across multiple grants programs, giving true insight into the impact of your funding efforts. In a single online solution, GMS360° gives you complete control and visibility over the entire granting process. From the initial call for proposals to reporting on final outcomes, GMS360° helps foundations stay on top of everything from correspondence with applicants, to monitoring budgets and reporting, eliminating hours of paper shuffling and administration. No two foundations are alike. That's why the technology behind GMS360° comes with the flexibility to fit your unique needs and deliver innovative solutions that transform how you manage your granting programs.

Our commitment to making processes work better and freeing our clients to do more good goes beyond the technologies we create – **it's at the very heart of our business.**

**Michael Reid**  
**Co-Founder, Chief Operating Officer**  
**SmartSimple**



## Discover more.

Contact us to request a demo that's tailored to your granting needs.



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SmartSimple interacts with over 115,000 unique users a month from over 300 organizations in nearly 200 countries.

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