



IRVING HARRIS  
FOUNDATION

## How Irving Harris Foundation streamlined processes with better, more responsive SmartSimple support



### Synopsis

Prior to switching to SmartSimple, Irving Harris Foundation had been steadily seeing their fees rise with their previous solution, Microedge GIFTS, yet these higher fees did not translate into a better customer experience. The Foundation wanted an improved, online solution for their expanding staff. GIFTS price points were unreasonable and their solutions were below average. By moving to SmartSimple, Irving Harris Foundation experienced dramatic improvements in service delivery by opting for its Premium Support Services offering. The Foundation was also able to modernize their antiquated paper-based processes with automated workflows and realize significant efficiency gains with features such as online document signing.



### Key Stats

**Client Name:** Irving Harris Foundation

**SmartSimple Client Since:** 2013

**Type of Giving:** Family Foundation

**Type of Giving:** Between \$10-15 million annually

**Old System:** Microedge GIFTS

**Key Pain Points:** Over-reliance on manual processes, limited functionality of an old and dated system, no integration capabilities, declining customer support.

**New System Must-Haves:** Easy to use on-line application for grantees, a true content management system, more responsive customer support, a central repository for data and easy file sharing capabilities.



*The more we use the system the better the team here feels about SmartSimple. Everyone is finding the automated workflows much more efficient than our manual process ever was. Foundations are typically slow to get with the times, but now I feel like I'm way ahead of the curve. ”*

June Matayoshi  
Grants Manager  
Irving Harris Foundation

## About Irving Harris Foundation

Irving Harris Foundation is a small family foundation based in Chicago. They provide grants to not-for-profit organizations focused on enhancing early childhood, reproductive health & justice, arts & culture, Jewish culture and social justice. Their mission is to enhance the quality of life for children, families and communities by advancing human potential, social justice, equality, creative experience and expression. They invest in initiatives that focus on the healthy social-emotional development and well-being of young children and their families through community vitality and creative development.

## Increasing costs put pressure on the Foundation to find another solution

The team at Irving Harris Foundation had been using GIFTS since the early 1990s. “Back then, there were only two users, and since our grants were donor-advised there was no need for reviewers,” says June Matayoshi, Grants Manager.

When GIFTS was purchased by Vista Equity Partners however, things began to really change. **“Suddenly our fees were going up for no real reason we could see, and they were pushing us to go with GIFTS Online. They were still building the system and we could already see that it wouldn’t be able to meet our needs.”**

With a wide range of grants management systems now available in the market, June and her colleagues decided to look around for an alternative. “We were seeing more and more foundations going online and we wanted to keep up with the times. We had an increase in program staff and things were getting unwieldy and more difficult to track. Everything was everywhere, coming in on paper, by fax and email.”

The Foundation brought in a consultant to help them sift through all available options and bring forward the grants management systems they wanted their team to look at. “We considered Fluxx, but many didn’t like how it looked, and FoundationConnect was much too complex for our needs. We looked at GIFTS Online again, and it was just under par. The switch would have been unreasonably expensive too.”

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Irving Harris Foundation  
is hosted on  
Amazon Web Services

## Moving to an online platform

The transition from a desktop and paper-based system to a completely automated, online platform took some time, and there were some challenges along the way. “We thought we’d just transfer our information to SmartSimple and go, but moving from paper to online takes a bit more work. **Fortunately, the SmartSimple team found solutions for us to get the data we needed in the right format to eventually switch everything over to our new platform.**”

While the transfer of data didn’t go as smoothly as they would have liked, SmartSimple’s post-implementation support won the Irving Harris team over. **“The move from implementation to support was excellent. We were really made to feel like we were starting a new relationship rather than just another business contract.**”

We decided to go with Premium Support Services as our support option and I have to say it’s priceless. We have an amazing Dedicated Support Representative who is always willing to help us with anything we need.”

## Extending system capabilities with integration paves the way to greater efficiencies

Irving Harris Foundation’s Dedicated Support Representative helped them find efficiencies through their automated workflows, as well as getting them set up to use Signority, an online document signing platform and one of many that integrates with SmartSimple. “The ability to integrate directly with an online document signing program has been a massive benefit to our overall process. We used to have to print, scan, fax, and email every contract, so Signority has been one of the biggest process improvements for us.”

“Signority means I can manage year-end much more effectively because contracts are sent back to us so quickly. Our team has managed to cut overall contract processing in half, saving a significant amount of time. **The automated reminders are a huge advantage - no more having to chase people down to get their signatures.**”

“The more we use the platform, the better the team here feels about SmartSimple. Everyone is finding the automated workflows much more efficient than our manual process ever was. Foundations are typically slow to get with the times, but now I feel like I’m way ahead of the curve. **It’s hard to believe I ever managed all the work I had to do using paper documents and faxes.** I would absolutely recommend SmartSimple to any organization stuck in a paper process rut.”

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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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