



## How Robins Foundation modernized their granting process for reporting.

### Synopsis

The Robins Foundation had an entirely manual grant application process that was managed by the use of separate Excel spreadsheets. Understaffed and under-resourced, they decided to modernize and digitize their entire process through one central and unified platform. They not only needed a solution that made their grant application process more streamlined, but they also required something intuitive that would give them robust reporting capabilities. SmartSimple provided them with a full service, end-to-end platform solution that was easy to manage and was adaptable to their evolving needs. Once Robins Foundation migrated their data over to SmartSimple, all staff were able to collaborate on one, unified platform, enabling everyone to have access to the same, real-time data vastly improving how efficiently the team worked. Robins' new system also helped streamline the application process by standardizing the method in which applications were collected. Overall, SmartSimple has helped Robins future proof their grants process by providing them with a grants management solution that can evolve and change as the foundation's needs and requirements change.

### Key Stats

**Client Name:** Robins Foundation

**SmartSimple Client Since:** 2014

**Type of Giving:** Grants

**Old System:** Paper and Excel spreadsheets

**Key Pain Points:** An outdated system requiring a digital overhaul to streamline, modernize, and future-proof the grant application process.

**New System Must-Haves:** An easy-to-use digital platform with robust reporting capabilities and clear channels for communication between the grants manager and grantee.



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*SmartSimple helped us create a platform through an intuitive process without tech jargon, and that felt good. We were able to look around and play with our new system without messing anything up, and this made it easier to experiment and made everything very comfortable.*”

Tracie Mooneyham  
Program and Grants Manager  
Robins Foundation

## About the Robins Foundation

The Robins Foundation is a Richmond, VA-based family foundation focused on elevating lower-income families and the communities they live in through educational advancement opportunities and resources. For the past 60 years of visionary philanthropy, they've supported and developed strong and strategic partnerships with organizations and projects that provide educational opportunities and resources for children 0-18. Their mission is to lead transformational change in the greater Richmond community by listening, learning and engaging through innovative philanthropy that inspires solutions to society's greatest challenges.

## An analog foundation with digital dreams

Although the Robins Foundation runs as a small operation, their need for a unified grants management platform was critical to creating a streamlined grant process. From the CEO to the office manager, all of their important documents were handwritten on paper. **“There was nothing online, and as a foundation, we decided to transition to be more responsive and proactive. We found paper wasn't cutting it anymore,”** says Tracie Mooneyham, Program and Grants Manager. They made efforts to enter into the digital age by moving paper copies to online programs like Pearl. Unfortunately, the program felt like it was no more than a “glorified spreadsheet.” Robins' methods were out of date, and they needed a cohesive tracking and reporting system that worked to meet the growing needs of their partners and grant applicants.

## Too much scattered paperwork

The most prominent reason the Robins Foundation needed to digitize their process was time. The number of hours spent on hand processing grant applications and tracking their data left the team with little time to do much else. By not having a centralized database, multiple contributors working on multiple versions of a file made it difficult to organize, and to have up to date and trackable data to work with. Application proposals were submitted as emails, faxes, and sometimes even hand-delivered without RFIs. “There was no eligibility quiz at the time, so we were receiving about 150 applications per cycle at two cycles a year – that's a lot for two people to manage.”

**“We wanted a one-stop shop and build out from there to make it easier for the [grants] manager and grantee,”** added Mooneyham. By modernizing and streamlining their application process with added information collected through eligibility quizzes, Robins could narrow down the number of applications and make sure they focused on Richmond-based applicants with specific information.

After doing intensive research, self-guided searches, and listening to sales pitches from a number of grants solution software providers, their search seemed fruitless until they came across SmartSimple as an option to meet their varied needs.

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Robins Foundation  
is hosted on  
Amazon Web Services

## A dream grants process becomes a reality

Working with SmartSimple, the Robins Foundation's entire grants process was digitized and transitioned online. The move was immediately met with open arms. **"After the first application went through, we looked for feedback, and everything was very positive,"** says Mooneyham. The platform made it easy for the staff and applicants to navigate the new online system. Now, every user knew where to click, save, and type. And since Robins Foundation had the platform to standardize how they received their applications, the entire grant application process became much more automated greatly reducing the need for manual intervention. **"There was less of a workload on an already capacity-strapped program team, and we wanted to make the application process easy on both sides [grants managers and grantees], so everybody wins."**

Not only was their new platform streamlining their workflow process with high functionality, the general UX was also very intuitive and eye-catching. Mooneyham added that "something as simple as buttons have become a phenomenal thing [...] they're appealing and make it easier to know where to go. You really can just click a button and trigger a domino effect where they [grantees] get notifications, I get notifications, and there's an incredible capacity for making everything really easy."

## No technology degree required — just curiosity

**"The biggest thing that resonated with me was that you don't have to have a tech background or be completely confident in your computer skills to use the system, so long as you have curiosity,"** says Mooneyham. She added, **"The technology enables you to make the changes you want to see."** Coming from the opposite spectrum with no philanthropy background while taking on a technical role on the staff, Mooneyham was surprised how comfortable she became with the flexibility of the platform. **"I had the ability and spark of knowing I can run a multi-user platform with different roles and access permissions."** By using SmartSimple's intuitive platform, you don't have to be a tech person to adapt to the system and thrive with its powerful benefits for your foundation.

## Relationship-based customer support

Building strong, lasting relationships are a cornerstone of SmartSimple's philosophy. It drives the company's desire to provide real solutions and tools foundations need to continue the good and authentic work they do in the world. Mooneyham loved the one-on-one conversations with our technical support team and added that **"SmartSimple spoke with me in a comfortable, relational way to make my transfer into this technical role smooth. I was afraid to be that person with so many questions, but I was able to turn questions into real collaboration and focus on our community which is our strength. I really appreciate the level of personal customer service, it's so important and so appreciated"**.



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## About SmartSimple

SmartSimple is a global leader in cloud-based automation software, offering unique process solutions used by over 250 clients in more than 192 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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