Annenberg Foundation

ANNENBERG FOUNDATION

How the Annenberg Foundation accelerated its grantmaking to capture the vital work of grantees across the US and world.

At a Glance

The Annenberg Foundation supports a wide range of initiatives nationally and globally. During 2019, the family foundation's total charitable distributions were $114.9 million. Before working with SmartSimple, the Grants team relied on a decentralized grants management system. It was time for the Foundation's online application to be upgraded, making comprehensive applicant vetting faster, and cutting down on the time spent manually entering data, printing and scanning documents, and managing email communications with grantees. The team knew they needed to reduce their administrative burden while offering a more modern, user-friendly platform to applicants and grantees. By implementing the SmartSimple Cloud for Grants Management solution, the Foundation has practically eliminated time-consuming manual processes for a centralized, cloud-based "filing system" for all its grantmaking operations. As a result, the prominent family foundation has seen greater efficiencies across the lifecycle of its grantmaking programs.

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Katrina Ashley
Senior Grants Manager

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Annenberg Foundation is a SmartSimple Cloud user

Request a demo and learn more about SmartSimple Cloud for Grants Management at www.smartsimple.com

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SmartSimple client since: 2018

Type of giving: Community and International Grant

Old system: GIFTS Classic, manual processes

SmartSimple product/services:

• SmartSimple Cloud for Grants Management

Key pain points:

• Application process was time-consuming, slowing down vetting and limiting the Foundation's reach
• GIFTS only allowed for one application type, causing further administrative challenges
• Program and grants administration teams worked separately in two different systems

New system must-haves:

• Offer grantees a more modern, user-friendly experience
• Allow all forms to be branded and tailored to respective programs
• Increase internal efficiency through automation

About Annenberg Foundation

Established in 1989, the Annenberg Foundation is one of the largest family foundations in the United States. The Foundation supports organizations across the US and the world through national and international giving initiatives, including the Annenberg/Corporation for Public Broadcasting (CPB) project (now Annenberg Learner). Guided by the Annenberg family's values, the Foundation's grantmaking focuses on supporting the arts, animal welfare, education, civic engagement, and technology.

Today, the Annenberg Foundation is led by Wallis Annenberg and her three children, who each lead their own initiatives. In the wake of COVID-19, the Foundation decided to shift its discretionary grantmaking to help communities through focused pandemic response efforts.

A grant application and review process in need of an overhaul

Before migrating to SmartSimple Cloud, the Annenberg Foundation used GIFTS Classic with an add-on component known as IGAM, which received online proposals for one of the Foundation's many grant programs. All other applications to this leading philanthropic foundation came in by email. Its previous system only allowed a one-step application process, which meant a significant time investment was required upfront for applicants to engage with the Foundation and submit proposals. To save applicants time and receive more applications, the Foundation wanted to break up the application process into two steps.

"We know it can be a burden on our applicants to submit a full form at once, only to have it declined because they're not eligible," says Katrina Ashley, Senior Grants Manager with the Annenberg Foundation. SmartSimple Cloud allowed the Foundation to revamp and improve its applications process. As a result, the Program team could pre-screen applicants with a brief LOI (Letter of Inquiry) application to determine their eligibility before completing the full Community Grantmaking (CGM) application. "Now with the workflows built into our system on SmartSimple Cloud, we have more time to read our LOI forms and give great feedback," says Ashley.

Having a two-step application has also freed up the Foundation to cast a wider net on potential grantees and find eligible causes even faster. From its last year using the previous system in 2017 to its first full year using SmartSimple Cloud in 2019, the Foundation's number of received applications increased from 217 to 389 – almost an 80% increase!

Now capable of developing multiple grant forms with its new grantmaking solution, the Foundation now offers a more efficient application process to its grantees. "Many of our grantees appreciate having that information at their fingertips," Ashley says.

An intuitive, new system to streamline its grantmaking process

Before SmartSimple Cloud, the grants department used two separate systems, one for the administration team and one for program staff. By contrast, the new system would house everything in one place, which meant it needed to be intuitive for all users. "One of the main reasons we selected SmartSimple Cloud was because of the look-and-feel of its dashboards and portals," says Ashley. "We felt that it was a better fit for our needs."

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> Senior Grants Manager

SmartSimple Cloud's ease of use allowed the Foundation to quickly create multiple grant application forms corresponding to different initiatives. "One of the great things about SmartSimple Cloud is that it has its own schedule, calendar, and deadline piece. It allows us to create different forms for specific programs," Ashley continues. The Grants team worked with leadership and SmartSimple to ensure each form had consistent branding and requested the information relevant to each initiative. Tailoring its grant applications to the specific initiative increased speed and accuracy in the applications process.

Powerful, new efficiencies within its grants management process

With its new centralized online system in place, the Grants team has eliminated data entry inefficiencies and significantly reduced paper usage. "We really set out to decrease our data entry time moving into a new system," says Ashley. "We spent a lot of our grants administration time entering information into the multitude of custom fields. That time has been greatly reduced with SmartSimple Cloud."

Working with SmartSimple, the Grants team built out its reports to eliminate the manual uploading process. "Now we have a reports portal where the grantees can submit their financial reports to us directly, so we no longer have to go back and look for an email." The Grants team can also schedule reminders to keep everyone on track. "With SmartSimple Cloud we were able to put in multiple reminders to grantees that their report is upcoming or overdue. So, we don't have to hunt for anything," Ashley continues.

A game-changer for the Grants team was the Email Anything feature built into SmartSimple Cloud, enabling them to easily attach emails and documents to grant records by forwarding them to a unique email address. "With that a unique email address for each grant record, we're easily able to have all communications in one place," Ashley says.

Having one tab dedicated solely for Due Diligence notes was another big win for increasing efficiency while reducing data entry. "Before using SmartSimple Cloud, we had multiple Due Diligence tabs we would have to fill out," Ashley continues. "Now, our data entry is down to one tab, and we don't have to type it in manually, so it's a lot faster."

Now equipped with a cloud-based grantmaking system, applicants can quickly and securely upload their information themselves. "It's all automatically saved into SmartSimple Cloud and the appropriate grant record, so we don't have to spend time at the scanner uploading documents into our system," says Ashley. "That's also made it easier to advocate to go paperless."

Timely and dedicated tech support for its unique needs

Although the Foundation required a fast implementation process and a short grantmaking shutdown period, SmartSimple was thorough and attentive when understanding the Foundation's unique needs. "The team at SmartSimple really took the time to talk things out and understand our system well," Ashley continues. "It was great to have their support with us on this journey."

Rather than lock themselves into a new workflow, the Foundation wanted to keep and fine-tune its existing processes. Here, SmartSimple delivered through both its configuration of SmartSimple Cloud as well as its ongoing support services. The Grants team was pleased with SmartSimple's Premium Support Services, whose assigned Dedicated Support Representative promptly handled all its support requests. "As we migrated and implemented our new grantmaking system, we knew there were going to be kinks we needed to work out. It's just great to have a dedicated support person who knows our system inside-out," says Ashley.

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A safe and seamless transition to work-from-home

During the pandemic year of 2020, the Annenberg Foundation supported 200+ grants with more than $40.7 million in total – a real testament to the reach of this family foundation across the US and the globe. According to Ashley, it could not have achieved this without a centralized, cloud-based system that facilitated a seamless transition to working from home. "When we transitioned to work-from-home, the grants department did not miss a beat," says Ashley. "We could just go home, log in, and continue our work."

Meanwhile, the Foundation successfully underwent its first virtual audit. The Grants team could quickly and securely pull the information they needed from the platform so that no one had to run back to the office. Within SmartSimple Cloud, the Grants team can even create an auditor user role and log-in details so the auditor can access the files virtually in the future.

Leading the way to better serve its grantees

In 2021 and beyond, the Annenberg Foundation hopes to tell a richer story with its grantmaking data by further building out its reports using SmartSimple Cloud's built-in chart and mapping capabilities. The Grants team also aims to modify its forms using versioning and multilanguage and accessibility features. "At the end of the day, it's all about our grantees and making sure we're not putting undue burdens on them," says Ashley. "We want to make sure we can capture the great work that they're doing." ●