

Edmonton Community Foundation



How Edmonton Community Foundation revamped and standardized its grantmaking with automation and configurable user portals.

At a Glance

The Edmonton Community Foundation (ECF) was processing millions of dollars in grants but ran on an unreliable and inflexible form-based solution for its grantmaking. Before seeking a new solution, they had two critical problems with their old system: only having access to surface-level information on grant statuses; and functions that kept breaking, including the ability to export data and create reports. ECF's entire grantmaking lifecycle required intensive manual effort in email communications, updating grant opportunities, and weeding through qualified applicants.

By implementing SmartSimple Cloud for Grants Management, ECF has improved and gained efficiency within its grant management processes. The foundation realized this through automated communication tools, applicant and reviewer portals to edit, track, and change the status of grants, and the ability to link applicant and organization records to recreate recurring opportunities more easily. ECF found efficiency gains within its procedures, including robust reporting and tracking capabilities to inform the long-term impact of its grantmaking efforts.

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Nick Diaz

Donor Grants Associate



Edmonton Community Foundation is a SmartSimple Cloud user

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

SmartSimple client since: 2020

Type of giving: Grants, Student Awards

Dollars granted: \$25 million annually

Old system: An unreliable form-based solution with a lack of reporting capabilities

SmartSimple product/services:

- [SmartSimple Cloud for Grants Management](#)

Key pain points:

- Significant manual tasks throughout the granting process
- Slow or delayed responses from vendor support
- Lack of visibility over applicant, organization, and application information

New system must-haves:

- Workflow management for all granting programs
- Visibility in any stage of the granting process
- Advanced reporting and tracking capabilities
- Less admin time spent on application-related emails and support tickets

About Edmonton Community Foundation

Formed in 1971 by the Edmonton Community Foundation Act, the Edmonton Community Foundation's (ECF) mission is to attract and manage endowment funds to make strategic investments enhancing the quality of life in Edmonton, Alberta, and throughout Canada.

ECF helps the people of Edmonton and the surrounding areas by encouraging philanthropy and funding charitable activities. Through contributions from donors, ECF raises and administers sustainable pools of capital so the returns can be sustainably reinvested in the Edmonton area.

Too many kinks in their previous grantmaking process

ECF runs three grant programs through their web portal: A Community Grants program that has more extensive, ongoing capital requirements, a Small Grants program that approves micro-grants on a weekly basis, and Student Awards program. However, the previous system they were working with could not keep up with changing requirements and had limited depth of capturing grantmaking information and reporting on program data.



“Everything [in the old system] was very surface-level. We couldn’t relate records, users didn’t have profiles, and our tools would regularly break, such as exporting and reporting data,” says Nick Diaz, Donor Grants Associate at ECF. When functionality did break, they experienced delayed vendor support, which in turn, delayed their mission-critical processes. “The turnaround times on support were not great,” says Diaz.

“When we started seeing features break, web pages failing, and the system not being able to export 500 student awards applications, we’d have to make a phone call to our support person, who could take two weeks to get back to us, which impacted all of our processes,” continues Diaz.

Added to that, their previous system could also not reliably accommodate continuity when working with multi-year awards and grantees. “Our old system couldn’t connect first-year and second-year requests. If an applicant asked for a renewal of an application, we couldn’t connect it, and it couldn’t produce reports,” says Diaz.

Working with a form-based solution that didn’t scale or offer the continuity ECF needed, the Foundation was starting to outgrow its system. They needed a system that was more flexible and scalable to add continuity to their work in the long term. “We didn’t have a lot of depth in our system until using SmartSimple CLOUD for Grants Management, and we were challenged with exporting data. It was there, but it was hard to access,” says Diaz.

Quickly implementing a new system during a pandemic

When seeking a new grantmaking system, a leanly-staffed team of six required a more intuitive and reliable solution that could bring a new depth of intelligence to the data they process. ECF sought features that eased friction within every stage of their grant application process. From submission and grant status updates through to reviews and post-award communications to awardees. After an extensive search, the ECF team decided on SmartSimple Cloud as their new solution, since the more flexible platform-based technology would meet their needs and enable them to gain a more dynamic view into their grantmaking to inform future decisions.

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Nick Diaz

Donor Grants Associate

Working in tandem with SmartSimple’s implementation team and an Account Manager, ECF opted to start fresh and not import historical data. While implementing SmartSimple Cloud for Grants Management, the ECF team found the process highly collaborative along the way. “When SmartSimple was building out the system, we got to go in and give our feedback in a very structured way throughout the whole process,” says Diaz.

Within about 100 days, ECF had a new solution implemented by June 2020 without causing any lapse in their programs, even amidst COVID-19 lockdowns. “We did this whole transition from our home offices... The transition [to SmartSimple Cloud] has been great because it hasn’t interrupted our granting at all; we’re still having the same positive impact on the community that we’ve always had,” says Diaz.

Greater efficiencies in the grantmaking lifecycle

Only a few months into using their new system, Diaz and the ECF staff have already gained a new depth of intelligence into their grantmaking. “It’s nice to finally have user profiles, so we can go look at an individual and see their history with the system,” says Diaz. With a more intuitive solution housing and tracking all the data they needed in one place,

ECF can link contacts to records, such as applicants to grants and reviewers to assigned grants, and develop a more straightforward organizational hierarchy of all their internal and external community users. "Linking records have been very powerful. It's all connected now, where before it was very disconnected," says Diaz.

User portals have been an integral element in many of ECF's workflow efficiencies. From reviewer portals that can assess, approve, or decline submissions, to applicant portals that can track their grant status and easily revise in-progress submissions. "When the grant applications come in, applicants can log into the system, see what's available to them, and hit 'apply.'" We don't even have to create new applications every three months, like we used to. We have the same application that opens and closes again," says Diaz.

ECF has realized greater efficiencies in staging their grant lifecycle, since every stage is now tracked all in one place. This, in turn, has enabled the foundation to evolve their process. "Before, we would receive the application, and then it would leave the system that we were using once it moved to the review stage. Now, everything is built into the system where we can segment application stages like 'draft,' 'submitted,' 'approved,' and 'reported.' This forced us to standardize our process. It was less about the system and more about having us have to rethink ourselves," says Diaz.

A more responsive support experience

With the inconsistent services of their previous system, ECF's lean team experienced delays in responses from their own applicant and user support requests. Since implementing SmartSimple Cloud for Grants Management, ECF now has access to SmartSimple's support teams that quickly assist any of their support tickets which, in turn, substantially reduces the amount of time to respond to their users' questions. "SmartSimple Support has been very, very snappy with responses. When you open a ticket, you get a response within a day. It's really fast," says Diaz. Applicant support has also been enhanced through the use of internal communication and automation features.

"Applicants can send questions through the system or by email. And when they hit the 'submit' button, it saves us so much time by sending them their application as a PDF attached to an automated email. Before that, we were doing it manually," continues Diaz.

The grant approval and decline emails have also been automated, saving hours of administrative time for the ECF staff. "We used to have to send decline and approval emails that would take many days to email 40-50 people more detailed notes about why they've been declined or approved. It now takes hours," says Diaz.

More automation, less stress

Using features like the Canada Revenue Agency (CRA) integration, grant applicants can self-register and use their CRA code to pull in their details. This reduces any errors and inaccuracies with organization details since they're pulled directly from the federal tax database. "Now, we're not getting people making accounts that aren't even eligible. It's weeding out all the people that can't even apply anyways," says Diaz.

ECF is now utilizing automated email workflows to reduce administrative time to focus more on strategy. "We were mail merging emails to every single applicant, whether they were denied or approved, and sending that to over 50 people every time," says Diaz. With automated emails, every time an application is approved or denied, an email will automatically be sent to the applicant with their associated notes.

Applicants are also benefiting from flexible SmartSimple Cloud features. "We set it up so that grant applicants can add co-editors of their submissions. If they've hired someone as a grant writer, they can invite them into the application to work with them. Before it was only one user per application," says Diaz. This feature enables applicants to collaborate with their teams to submit the best and most accurate application they can, which increases their chances for approval.

Getting ready to help a broader community

ECF already has their eyes on the future and how to further expand their system, including integrating their financial processes for even more continuity. The foundation is also looking to add more programs into the system, including their scholarship program, which will impact a broader community. "Once we go live with our scholarship program, we'll be going from a few hundred organizations to thousands of individual students," says Diaz. ●

