

Pennsylvania IOLTA Board



How the Pennsylvania IOLTA Board built a robust client service and financial reporting system.

At a Glance

For their lean staff size, the Pennsylvania Interest on Lawyers' Trust Accounts Board (PA IOLTA Board) conducts complex and detailed reviews of their grantee organizations. In order to ease the administrative burden on staff, the PA IOLTA Board sought to automate their granting process with an online grant management software.

SmartSimple delivered a robust and intuitive system specifically tailored to their unique reporting requirements. Now, their staff has more time to devote to substantive issues surrounding their grantmaking.

SmartSimple client since: 2018

Type of giving: Grants that support the provision of civil legal aid in Pennsylvania

Dollars Awarded: Nearly \$28M (\$5M managed through SmartSimple Cloud)

Old system: Manual process

SmartSimple product/services:

- [SmartSimple Cloud for Government Funding](http://www.smartsimple.com)

Key challenges:

- A disconnected reporting process through Excel spreadsheets, Word documents, and emails.

New system must-haves:

- A centralized system with robust client services and financial reporting capabilities.

"We've only used a small portion of what was built out in SmartSimple, Cloud and the platform has exceeded my expectations."

Jim Swoyer

Grants Manager



Pennsylvania IOLTA Board is a SmartSimple Cloud user

Request a demo and learn more about SmartSimple Cloud for Government Funding at www.smartsimple.com

About the Pennsylvania IOLTA Board

The PA IOLTA Board is a nonprofit organization operating under the jurisdiction of the Supreme Court of Pennsylvania. The PA IOLTA Board carries out its mission to financially support the delivery of civil legal aid to low-income and disadvantaged Pennsylvanians through the careful administration of various revenue sources, both court-directed and legislatively-directed.

Upon approval of the Supreme Court of Pennsylvania, the PA IOLTA Board makes grants annually to qualified legal aid organizations across the state, Pennsylvania's nine law school clinical and externship programs, and administration of justice projects — all of which provide legal assistance to low-income individuals and families facing a civil legal crisis where basic human needs, such as shelter, food, medicine and safety, are at stake.

This year, the PA IOLTA Board awarded nearly \$28 million to 35 legal service organizations and 9 law schools. Since the inception of the IOLTA Program in Pennsylvania, more than \$295 million has been awarded in grants.

Too many programs, not enough time

While the PA IOLTA Board is one of the larger IOLTA programs in the United States in terms of the funds it administers, it has a small staff of six people that work in-house. Limited resources meant that every part of the granting process needed to be as efficient as possible, yet they were working with scattered tools. "We were using an online grants management system that we discontinued and went onto Word, Excel, and email which felt like everything was on paper," says Jim Swoyer, Grants Manager for PA IOLTA.

The majority of the PA IOLTA Board's grants are disbursed quarterly, and after the grantees report on their expenditures and delivery of services, another quarterly payment is issued. These detailed, recurring reviews ensure accountability

for the efficient use of limited public funds. In the previous fiscal year, the PA IOLTA Board received and reviewed 281 Grantee Performance Reports.

"It was time consuming to prepare the report forms each quarter," says Brianna Bosak, Assistant Grants Manager for the PA IOLTA Board. Once the compliance reports were created, staff still faced the administrative burden of having to distribute the reports by way of email. They needed one centralized system for both grantees and staff to input and manage real-time data.

Forming a cohesive granting process

The PA IOLTA Board knew what they needed from their system from the start. Handling the search internally, they thoroughly researched and evaluated nine different vendors over the course of three months. They also contacted other IOLTA programs and consulted Idealware's Consumer Report on Grants Management. Eventually, the PA IOLTA Board narrowed their search to two software systems that could support their complex compliance reports. "We couldn't find a lot of vendors that could show Year-to-Date views, which is an important part of evaluating the relationship between the services provided and the money spent to provide those services," says Brianna.

In addition to their robust reporting requirements, they needed a portal that their grantees could sign into from anywhere to access their quarterly compliance reports. They also wanted the ability to collect integrated post-award grantee information from the reports and also to administer other grant related functions, like the creation of the contracts, all in one place. "Ultimately, we wanted to sync our reporting and operational processes together and also to automate as many of our processes as possible," says Brianna. The only system that accommodated their needs was SmartSimple Cloud.

"Managing the process through SmartSimple has saved us a lot of administration time this year."

Jim Swoyer
Grants Manager

Manual data entry becoming a thing of the past

The intensive implementation process took three months in total. "SmartSimple's Development team was receptive to feedback and worked on solutions that worked with our processes," says Brianna. Once the system was set in place, their intuitive centralized process was immediately adopted by their grantees. "We didn't get a single complaint with the application process after implementation," says Jim.

Through their new system, the PA IOLTA Board was able to dimension their grant agreements and distribute the contract through the system. "Managing the process through SmartSimple Cloud has saved us a lot of administration time this year," says Jim.

Having all of the data automatically entered into the system has also drastically cut down on administrative time spent. "We have significantly reduced the amount of data we need to manually collate," says Jim. The internal reporting mechanisms within SmartSimple Cloud is another function the PA IOLTA Board enjoys about the system. "I like being able to pull data quickly and reliably," says Brianna. This has enabled staff to devote more time to substantive issues surrounding the PA IOLTA Board's grantmaking.



Manual data entry becoming a thing of the past

The PA IOLTA Board is already working on more ways to tailor their processes to be even more efficient. "We're currently working on enhancements to our system that will make the application process less burdensome for staff members and grant applicants alike," says Brianna.

With the high configurability and flexibility of the SmartSimple Cloud platform, it can quickly scale to the growth and future needs of the PA IOLTA Board. "We've only used a small portion of what was built out in SmartSimple, and the platform has exceeded my expectations," says Jim. ●