

## Pohlad Family Foundation



**How Pohlad Family Foundation created a more secure, paperless Grants Management System.**

### At a Glance

The team at the Pohlad Foundation were using another grants management software platform, but recent changes within that company resulted in increased costs, slower response time for support requests and a much more rigid system structure.

"We were looking for a new online system that would work for our grants program, and ideally one that would also support our employee matching gift program so we could get rid of the paper-based, highly intensive process we were using," says Misha Dashevsky, Grants Manager at the Pohlad Foundation.

**SmartSimple client since:** 2012

**Type of giving:** Grants

**Old system:** Paper-based

**SmartSimple product/services:**

- [SmartSimple Cloud for Grants Management](#)

### Key pain points:

- A cumbersome paper-based grants process where all communications grants manager and grantee were physically mailed taking up too much time

### New system must-haves:

- A digitized platform where all data and documents were safely stored and secured



"I think SmartSimple has a solid understanding of what American private foundations need in an online solution."

**Misha Dashevsky**  
Grants Manager



Pohlad Family Foundation is a SmartSimple Cloud user

**Request a demo and learn more about SmartSimple Cloud for Grants Management at [www.smartsimple.com](http://www.smartsimple.com)**

### About the Pohlad Foundation

Established in 1993 by Carl and Eloise Pohlad, The Pohlad Family Foundation is focused on supporting the needs of the Twin Cities community. Their family wanted to transition their good works to a more public effort, sharing their love of the Minneapolis/St. Paul region and building on their efforts to improve the quality of life in the region they call home.

### Selecting SmartSimple

Gina DiMaggio, Program Officer for Pohlad, was the lead in the selection process, "Our Account Manager, Todd Lapin, was very familiar with our former system, so he really understood the issues."

"At the time we were shopping for our new system," Gina continues, "the world of grants management software was exploding. The problem was that most vendors weren't particularly well established and we didn't want to spend the time and money investing in a company that might disappear the next day."

SmartSimple was not only well-established, their fee structure was reasonably priced. To be honest, some companies had what seemed to me to be artificially low prices, and while cost was a consideration, simply choosing the cheapest option just didn't make sense."

### Working with SmartSimple Cloud

"Our goal was to create a system that kept things simple," continues Gina. "In the beginning there was a bit of stress gathering all the appropriate information SmartSimple needed to build our solution, but fortunately we had people like



Quality Assurance Specialist Ciaran Donnelly, on our team. He was always quick to fix any issues we encountered during implementation and answered our questions in a way we could all understand."

"I have to be honest, when I was first introduced to SmartSimple Cloud, it seemed complex," adds Misha, who joined the team after the initial implementation. "The fact that it was so customizable and so flexible was a bit overwhelming at first, but once Gina trained me, I realized how much there was that was easy to use."

"It's also huge for us that the Support Team is so responsive," Misha continues, "for example, Yousif Elhakim spent a good 45 minutes on the phone with me when I needed to build a new automated workflow and needed a lot of guidance. He was very patient and helpful."

Plus, tools included in the system, such as the Community Portal, are a fantastic way for us to communicate directly with the entire SmartSimple team when we need assistance or simply have a question."



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**Gina DiMaggio**

Program Officer

"[SmartSimple Cloud] has really streamlined our processes and has made our team more efficient and accountable," Gina adds. "Data storage is much better and it's so easy to access and provide information requests from our Program Officers. The edit view function gives me the ability to report on and return data related to any grant applications – it's very flexible!"



"The system also saves us a considerable amount of time managing our employee matching gift program," Gina says. "With the old paper system we spent an unbelievable amount of time mailing documents to non-profits and processing what was returned. Now, it takes a fraction of the time to respond to requests. Plus, it's a much easier system for our employees to use, with nowhere near the number of steps that used to be involved. Employees get replies to their queries quickly and we can pay out grants faster."

The Pohlad team also likes the fact that important documents for every grant in their system are stored online in a safe and secure environment. "We don't lose documents anymore. We are very confident that everything is kept organized right within the system," adds Gina.

"We did a survey of our users asking about their experience with the grants system, and the response was very positive – 80% said they were satisfied with [SmartSimple Cloud] and 70% said they had no problems using it," concludes Misha. "I think SmartSimple has a solid understanding of what American private foundations need in an online solution." ●