gen3

vancouver foundation

amplify
A SmartSimple Amplify user

Success Story:
Vancouver Foundation

Re-imagining an inefficient grantmaking process for a more streamlined, integrated system to maximize impact

With over 200 different funds to grant from and hundreds of new proposals submitted each year, Vancouver Foundation had difficulty being efficient and effective through its collection of segregated in-house processes and systems. Gen3 configured a grantmaking system that had an intuitive application process from submission to post-grant reporting and it enabled the community foundation to maximize the funding available. Most importantly, their new system empowered them to rethink and develop new, innovative work strategies to scale their work for the future.

"

List views have helped me quickly analyze data in a way to help the board make a decision and feel comfortable with going in a new direction.

"

David Doig
Director of Field of Interest Grants
Vancouver Foundation

Vancouver Foundation

Client since: 2018

Type of giving:
Grants

Current platform:
SmartSimple Platform3

Previous platform:
Enterprise Resource Planning
(ERP) software along with
Excel spreadsheets and
Word documents

Key challenges:
- Too many systems working in isolation of each other
- An inefficient grant application process

Key requirements
- Integrations to centralize data from managing grant programming, volunteer reviewers, and meetings
- Implementing a taxonomy for fund matching and data analysis

About Vancouver Foundation

Vancouver Foundation is a community-inspired foundation that connects the generosity of donors with the energy, ideas and time of people in the community. Since 1943, they've brought together donors, nonprofits and charities, government, media, and academic institutions, as well as local leaders and passionate individuals to build meaningful and lasting change in the Canadian province of British Columbia.

Bound by an inefficient process

Vancouver Foundation's granting process had been disjointed and inefficient. While they had a number of systems to manage the different parts of the process, none of them functioned effectively with each other. They worked with a legacy Enterprise Resource Planning (ERP) system, an online application portal they built themselves, and a variety of Word and Excel documents to receive, assess and track multi-year funding proposals and commitments. This setup caused inefficiencies in the process that created more work. *"Although the systems we created to manage specific points in the grantmaking process worked well on their own, it was always a challenging and labour intensive process to understand and analyze our caseload at any point in time,"* says Dave Doig, Vancouver Foundation's Director of Field of Interest Grants. Bound by this inefficient process, Vancouver Foundation started to search for an integrated grantmaking system that would not only introduce efficiencies into their process, but would also give them the flexibility to respond, change and scale over time to increase their effectiveness.

The search for a configurable grantmaker system

Vancouver Foundation was looking for a system with a suite of interconnected integrations to assist with a large volume of application processing, multi-year grant management and reporting, meeting and volunteer management, and fund matching in one, cloud-based platform.

Beyond that, the foundation wanted to simplify their current process, while creating the capability to innovate their work for more community impact.

"At the time we were looking for new software, we had been using our in-house process for a couple of decades. We realized that we only knew grantmaking from our own entrenched perspective, and so hoped that working with a new solution would lead to new methods and ideas about

how to be more effective," says Dave. The foundation also recognized the importance of finding a solution that could be owned and managed by the granting department, instead of by a small IT team. Dave was impressed by Gen3's collaborative approach and the team's ability to translate the Foundation's needs into a highly tailored plan that effectively incorporated the foundation's most pressing requirements.

A system that fulfilled on its promises

An important goal for the foundation was to find a way of maximizing the number of grants they could make. In order to do this, they had to come up with an efficient way of quickly identifying grantseekers that aligned with their program objectives. To tackle this, they worked with Gen3 to develop a number of taxonomy-based search assist tools that could be used at each of the workflow stages. Within their system on SmartSimple's Platform3, the community foundation is now able to code, fund and assign volunteers for every proposal, using the same taxonomy.

From there, they use the taxonomy assist tools developed by Gen3 to put their review panels together, by grouping like proposals and pairing them with the right volunteers who have the necessary perspectives to review the proposals. Next, they use the fund search tool to identify funds that are most aligned to the purpose of a specific grant proposal, beginning with the most restricted funds first. At the end of the process, they use Platform3's list views, dashboards and reporting functionality to understand and describe the characteristics and breath of the caseload, based upon the taxonomy. *"Our taxonomy is four levels deep for each of the Purpose, Place and People categories, and the search tools need to take that into account. It's quite amazing that way!"* states Dave.

The Vancouver Foundation's Platform3 system went live in July 2018 and the responses from most users were immediately positive. *"Our applicants appreciate being able to submit all of the proposal details using just one online form and our volunteer reviewers love using the system to assess and rank the proposals,"* says Dave. Not only have the search assist tools made the overall process more efficient, it's also helped Vancouver Foundation to demonstrate their effectiveness at maximizing the funds that donors have left to its discretion to support a wide range of community-led initiatives.

> "
>
> We realized that we only knew grantmaking from our own entrenched perspective, and so hoped that working with a new solution would lead to new methods and ideas about how to be more effective.
>
> "

gen3

Since 2007, Gen3 has been developing, configuring, and implementing holistic grant and case management solutions enabling philanthropic organizations to align their vision with the achievement of their goals. By leveraging the dynamic flexibility of SmartSimple's Platform3, Gen3 delivers state-of-the-art collaborative solutions that empower some of the largest, highest profile organizations in the world, enabling them to maximize their mission's impact.

Gen3 takes a truly collaborative approach that enables them to understand unique business challenges and deliver software solutions that truly transforms organizations. They work with clients to identify their requirements, recommend and implement flexible and innovative solutions, train their personnel, and ensure a successful go-live.

Learn more at **www.gen3impact.com**