



A SmartSimple Unite user

## How the City of London Evolved Their Granting Process With Future-Proof Technology

### Synopsis

The City of London had a completely paper-based system to manage their granting activities. All signatures had to be physically collected and were only accepted on original, printed documents. Every application had to travel between the applicant, reviewers, and the city's granting office, making it difficult to properly track and organize them. Because of all the back and forth, grant reports took a great deal of time to complete. Reports were shared as blank templates which meant they were often submitted without all the required information. Once the city implemented SmartSimple, everything was organized and centralized online. They saved hours of time in processing applications, building reports and tracking all aspects of their granting program.

### Key Stats

**Client Name:** City of London, Ontario

**SmartSimple Client Since:** 2015

**Type of Giving:** Grants

**Dollars Managed:** \$1.8 million annually

**Old System:** Microsoft Office, paper

**Key Pain Points:** Too much paper, no centralized document storage, no online document signing capabilities, reports extremely time-consuming to complete

**New System Must-Haves:** Cost effective, online application and tracking, intuitive to use, able to evolve, strong security features



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Jen Carter  
Manager, Policy and Strategic Issues  
City of London

## About the City of London

London is a Canadian city located in Southwestern Ontario. With a population of over 380,000, the city boasts a vibrant art scene as well as several historically significant sites and museums. London is home to one of Canada's largest universities, the University of Western Ontario, and one of Canada's largest colleges, Fanshawe College. Their granting activities align with the city's strategic plan, and work to advance the priorities of Strengthening our Community, Building a Sustainable City, and Growing our Economy. The city funds a number of different organizations from large non-profits to smaller, grassroots organizations.

## Drowning in spreadsheets, contracts, and photocopies

The City of London's manual, paper-based system was in desperate need of an overhaul. "With all the grants being on paper, nothing was, or even could be, automated. Staff were using an Excel spreadsheet to try and administer grants, track awards, and maintain reporting data," said Jen Carter, Manager, Policy and Strategic Issues.

"There were reams of paper going back and forth between us, our finance department, our grantees and reviewers. The system also involved stacks of contracts that needed original signatures, which then had to be filed. But the biggest pain for us was reporting. Reporting is a very important part of our granting process, and we need to be accountable for how public dollars are being spent. Our team worked very closely with organizations to assist in completing reports, but with a paper-based system, this took several rounds of edits."

"We had a large volume of photocopied documents - mostly applications - that we would add handwritten notes to. At times it was difficult to tell if those notes had been incorporated into the most recent versions of our documents. Applications submitted to the city were frequently missing information which involved a lot of back and forth to gather missing data."

Through their strategic plan, London's city council directed the municipal granting team to modernize the process so that they could better support local organizations and residents. One way was by providing a simple, online application and tracking system that everyone could use.

## Seeking a community-friendly solution

"When we set out to find a grant management system, we thought there were only two options; purchasing an 'out of the box' system that was inexpensive but did not allow for the level of personalization we required and would be difficult to update; or spending a significant amount of money to build a custom system that would work for our current needs with little flexibility to change."

The city had considered a Microsoft-based CRM, but it would have cost upwards of \$300,000, an amount significantly higher than what was budgeted. "Because we are using public funds for important investments to enhance our community, it's critical for us to be accountable for every dollar we spend."

"The City of London's grant applications also have to be intuitive, so it was important to build a system accessible to all levels of computer competency so anyone could apply for funding with minimal assistance from us. We have a variety of different groups using the system, including older adults applying for small neighborhood improvement grants, environmental groups looking to beautify the city by planting trees, and large, established organizations with a strong aptitude for completing grant applications."

"Among our other requirements was ensuring we implemented a system that was highly adaptable; able to change as the priorities of the city do. We needed a solution that could easily grow and work for the city over the long term. And, as a municipal government department, it's extremely important that we adhere to very high security protocols. Jen did some online research and discovered the Idealware

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City of London is hosted on Amazon Web Services

Consumers Guide to Grants Management Systems. “It was a great resource to begin our search for a grant management system, and helped us identify the right vendor for an online system to suit us.”

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“SmartSimple offered a nearly endless range of configurable features and functionality. It was exactly what we were looking for to make our grant process more efficient, and move entirely online.”

## An adaptable future for the city’s granting process

Having never been through a major system implementation before, Jen was appreciative of the guidance and support provided by the SmartSimple team. “The implementation process gave us the perfect opportunity to reevaluate how we managed our granting program from every angle. We were entirely open to new ideas and to be challenged about our current process in order to develop a system that would be both efficient and effective. Our SmartSimple implementation team was able to adapt and adjust to all the parts of our granting process, making the program much easier to manage.”

“SmartSimple is making our work supporting organizations so much easier. We have eliminated many of the time-consuming aspects of our old process, and can now focus on other priorities. Our team finally has time to support and empower our grantees, building the capacity of the organizations the city funds.”

“We’re very happy that we chose SmartSimple for our grants management system. We really appreciate the ongoing, open dialogue between SmartSimple and their clients to evolve the platform; they use our feedback to continually improve the system and make certain it is reflective of the needs of their clients. SmartSimple actually takes our suggestions into consideration, which is reflected in new features that are added through quarterly upgrades. SmartSimple truly empowers me to use and configure new functionality on my own; that means, technically, I can build new pieces of our system on my own.”

## A time-saving solution to grow with

These substantial process improvements ensure the city’s reports are now automatically sent to organizations complete with past due reminder emails. “Organizations submit their reports to their board members for approval through SmartSimple, and we’ve eliminated the need for physical signatures. With the ability to create workflows to automatically send out reports to grantees, reporting is already set up to be entirely managed through the system for the next 3 years.”

Jen has been so thrilled with their SmartSimple system that she has recommended SmartSimple to other municipalities as well as other departments at London City Hall.

“The City of London will be bringing more departments online with SmartSimple. With the range of highly private and personal information that other departments manage, they quickly saw how SmartSimple would align with their security requirements and provide a cost-effective solution that supports city staff to better serve our community.”

“SmartSimple is invested in supporting us to meet our growing business needs; not just the needs of my team, but for all the residents of London. With the ability to constantly enhance our system and adapt to change, SmartSimple will be a valuable partner for years to come.”

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## About SmartSimple

SmartSimple is a global leader in cloud-based automation software, offering unique process solutions used by over 300 clients in more than 192 countries. Some of the largest companies in the Fortune 100, as well as global foundations and government agencies, choose SmartSimple to enrich their impact story and create greater efficiencies in their granting processes.

## SmartSimple's Unite Solution

SmartSimple's Unite Solution is a robust, end-to-end grants management platform that makes it easy for government and funders to track, manage and report across multiple grants programs, giving true insight into the impact of your funding efforts. In a single online solution, SmartSimple gives you complete control and visibility over the entire granting process. From the initial call for proposals to reporting on final outcomes, SmartSimple helps funders stay on top of everything from correspondence with applicants, to monitoring budgets and reporting, eliminating hours of paper shuffling and administration. No two funders are alike. That's why the technology behind SmartSimple's Unite Solution comes with the flexibility to fit your unique needs and deliver innovative solutions that transform how you manage your granting programs.

Our commitment to making processes work better and freeing our clients to do more good goes beyond the technologies we create – **it's at the very heart of our business.**

**Michael Reid**  
**Co-Founder, Chief Operating Officer**  
**SmartSimple**



## Discover more.

Contact us to request a demo that's tailored to your granting needs.



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SmartSimple interacts with over 215,000 unique users a month from over 300 organizations in more than 192 countries.

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