

Vancouver Foundation



How Vancouver Foundation created an efficient process to maximize its grant funding.

At a Glance

With over 200 different funds to grant from and hundreds of new proposals submitted each year through different granting calls, Vancouver Foundation had difficulty being efficient and effective through its collection of segregated in-house processes and systems.

[reSolved](#) configured an intuitive application process from application submissions to post-grant reporting that also assisted the Foundation to maximize the funding available. Their new flexible system allowed them to rethink and develop new, innovative work strategies to scale their work into the future.

“We can see better now where the opportunities are to improve and then move forward from there.”

David Doig

Director of Field of Interest Grants



Vancouver Foundation is a SmartSimple Cloud user

SmartSimple client since: 2018

Type of giving: Grants

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

SmartSimple product/services:

- [SmartSimple Cloud for Grants Management](#)

Key challenges:

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

reSolved Impact:

- Built integrations to centralize data from managing grant programming, volunteer reviewers, and meetings
- Implemented a set of taxonomy search tool for fund matching and data analysis

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

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, non-profits and charities, government, media, and academic institutions, 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 has been disjointed and inefficient. 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.

“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.

The search for a configurable grantmaking system

The foundation wanted to simplify their current process, while having the capability to innovate their work for more community impact.

Not only did Vancouver Foundation want to simplify their current process, but they also wanted 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.

They 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 reSolved'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 reSolved to develop a number of taxonomy-based search assist tools that could be used at each of the workflow stages.

Within their SmartSimple Cloud for Grants Management system, they code every proposal, fund, and volunteer using the same taxonomy. They then use the taxonomy assist tools developed by reSolved 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 SmartSimple Cloud'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.

Their SmartSimple Cloud Platform 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.

Support from all sides

The creation of Vancouver Foundation's system took a collaborative approach. Dave reflects that "the reSolved team checked in regularly with us. They were really good at presenting ideas and were more concerned about being an ally instead of selling us a system."

On an external level, Vancouver Foundation's team appreciated the support and connection found within the SmartSimple community of users. "We like the ability to talk to other foundations and to learn from them."

Looking forward to the future

Vancouver Foundation is looking forward to further leveraging the dashboard and reporting abilities to help tell their story. By simplifying their processes, they now have a clearer view of what to improve. "We can see better now where the opportunities are to improve and then move forward from there." ●

