

Case Study: The Campbell Foundation



A family foundation that believes in strategic infusions of funding, **The Campbell Foundation** dedicates nearly 100% of their grant dollars to the environment. As citizens of the planet, they are compelled to participate in the protection of natural resources in the communities where they live.



Reduced Burden of System Maintenance

Decreased number of forms
from dozens to just 9



Provided Ability to Scale

Decreased time for grant
invitation prep from 20
minutes to 1 minute



Improved Staff Efficiency

Streamlined mass mailing
process from 3 hours
to 10 minutes

“If we had to scale up tomorrow from 350 grants to 1,000, that wouldn’t be a problem. The grants management process is so much faster that we have freed up time to launch new initiatives, like providing grantees with capacity building support.”

– Anna Lindgren, Assistant to the President, The Campbell Foundation



Lack of data centralization and scalability

The Campbell Foundation needed a way to link its conservation grants management across two locations—the Pacific office and the Chesapeake office. “When I started, all of our grants were being managed on multiple spreadsheets,” said Anna Lindgren, Assistant to the President at the Campbell Foundation. Eventually, the organization implemented an online system for grants management, which was a step forward, but the solution had limited reporting capabilities and couldn’t scale. Only three months after completing the implementation, the vendor announced that the nonprofit would have to migrate to a new platform, which offered less functionality and no longer met the foundation’s needs.



Limited visibility into important data and related reports

Staff didn’t have easy visibility into comprehensive data, which made it difficult for them to quickly assess how much of their budget had been allocated, or to report on the impact of their funding. “When I was trying to report on specific grants, a lot of the work had to be done manually in spreadsheets, then I would create a report using the data that I had cobbled together,” explained Anna Lindgren, Assistant to the President at The Campbell Foundation.



Weak oversight of grants and grantmaking

There was limited transparency associated with the foundation’s previous grant making system, which led to a lack of accountability. “We wanted to have more visibility into what each office was doing on the grants front, rather than relying on staff to provide anecdotal information about results.”



Manual grantmaking processes

“In the old days, generating simple grant documents meant a ton of copying and pasting, and spending time adjusting formatting,” said Anna. These manual processes stretched the lean team’s precious capacity. “It was a copy and paste nightmare just to get one grant out.”



Room for human error

With so many manual processes in place, there was too much room for human error related to grant making and grants management.

“The data migration was so easy! I was fearful that it was going to be a nightmare, but it literally happened overnight without any issues.”

Anna Lindgren, Assistant to the President, The Campbell Foundation

Solution

After researching several grants management solutions, The Campbell Foundation selected foundationConnect on the Salesforce platform, and secured Exponent Partners to implement the solution and migrate all the nonprofit’s historical data.

“Exponent Partners presented such a comprehensive package: the plan, the rollout, the resources,” explained Anna. “Everything was well organized and professional. It was the exact opposite of the experience we had had with our previous vendor. I can

count on the Exponent Partners’ team because they worked with me like a true partner. I was impressed when, in the end, they came in under budget and ahead of time.”

Grant applicants can apply and report on grants online through the foundationConnect portal, whereas grant management processes, including administrative functions, are automated within Salesforce.

Gained access to organization-wide data

With a central database in the cloud, staff can see a full picture of their grantee status, budget allocations and more. Self-service reports also save time as staff no longer have to wait for others to prepare and share reports. “foundationConnect has made us better collaborators—we are more aware of the grants that each office is making and can look at the related information in real-time,” explained Anna.

Improved grantmaking administration

The foundation is now able to accept and manage online applications efficiently. foundationConnect allows the nonprofit to quickly filter proposals based on specific criteria and successfully identify ideal grantees. “I’m spending less time fixing things, and more time focusing on the grants themselves,” stated Anna. Grant invitations are now easily and quickly sent out with the click of a button, rather than copying and pasting information from various sources. “Before, exporting and sending invitation emails would take 15-20 minutes each, but it now takes a minute. This leads to significant time savings, when we are sending out dozens of invitations every month.” Similarly, mass emails, such as job announcements, used to take 3 hours to get out because they had to be done in small batches; now, it is a 10-minute process to review the list and send the message.

Detailed reporting and insightful visualization tools

The foundation is able to report on and view their data in ways that weren’t possible before. “We’re able to easily drill down from summary reports into the details,” said Anna. “Now when somebody gets hired at The Campbell Foundation, they are amazed by the systems we have in place. We are really dialed-in with our grants process and the reporting that we can do.” The foundation also turns to the AppExchange to find and add new tools that will continuously increase productivity and data tracking. For example, the nonprofit integrated Geopointe, an app that creates useful maps for visualizing different projects and advanced tracking of indicators for grants geographically.

Avoided back-filling 2 full-time positions

After two staff left the organization, there was no need to backfill these full-time positions. According to Anna, “One of our employees took over a whole other program and is still able to process grants in a timely and quick manner without a noticeable increase in workload because so many of our processes are now automated.”

Reduced number of forms

With assistance from Exponent Partners, the foundation consolidated dozens and dozens of forms for different grant levels. Nine forms are now in place—three each for proposals, renewals, and reports. This reduction in forms has streamlined the maintenance process.

Enhanced data integrity

Validation in foundationConnect has improved data quality and avoided issues such as duplicate payments or missing fields. Changes made to the data are automatically tracked, so that management can see who made the change and when; the related notes tells them why the change was made. This has reduced data entry errors to the point that they rarely occur.

Enhanced outcomes tracking and performance management

New data fields enable the foundation to collect key information about how much the organization is spending for outcomes and objectives, such as number of grants and dollars spent. foundationConnect also helps staff understand performance and track indicators that align with the nonprofit’s strategic plan. These valuable insights enable management to shift funding around as needed. The foundation’s President also has easy access to dashboards that provide visual answers to important questions, such as: how much money is left to spend in the budget? How many grants has each office made? Which organizations are receiving the most funding? These details are complemented by management-related information, such as which employee is doing a good job linking emails or adding notes.

Gained ability to scale

“If we had to scale up tomorrow from 350 grants to 1,000, that wouldn’t be a problem now,” stated Anna. “The grants management process and the processing feed are both so much faster that we have freed up time to launch new initiatives, like capacity building.” This extra time is also being used to communicate directly and frequently with grantees, providing more oversight of grants.

About Exponent Partners

Exponent Partners builds technology for social change so that nonprofits can understand their results and improve programs and services. Our solutions help organizations manage their outcomes on the Salesforce platform. As a B Corp and a California Benefit Corporation, we pursue our mission to make the social sector more effective through insights that drive impact. With deep expertise in Education, Human Services, and Philanthropy, we work with nonprofits who are driving change at the ground level and those who fund these organizations.

We have worked with over 500 large and small nonprofits organization on over 1500 projects in our more than 10-year history as a Preferred Partner of Salesforce.org. We are also the developers of Exponent Case Management, an app for human services agencies on the Salesforce AppExchange.