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William Penn Foundation Case Study



Overview



Established in 1945, the William Penn Foundation’s mission is to help improve education for low-income children, ensure a sustainable environment, foster creative communities that enhance civic life, and advance philanthropy in the Greater Philadelphia region. Each year, the family foundation reviews over 200 grants and awards \$110 million in grants.



Centralized grants management data:

Reduced number of databases from 3 to 1, allowing key data to be accessed through a single sign-on



Enhanced collaboration:

Grantee portal allows staff and grantees to collaborate on grants and the related results, milestones, and activities to achieve better outcomes



Improved efficiency:

Clear processes with multiple departments working simultaneously, as well as increased transparency during grant development, has increased productivity

“Our old system required a lot of passing of the baton—one person had to complete their work before another person could do theirs. Now, work can happen simultaneously—financial review, legal review, deliverable review, and more. There is more transparency into what others are doing and how they can support each other.”

– Samantha Shain, Database Administrator, William Penn Foundation



Situation



Grant data housed in three separate databases

The Foundation used Blackbaud GIFTS as its primary transactional database for grants management. The GIFTS database was supplemented by a custom-built solution for workflow and portfolio management. Lastly, Excel spreadsheets that lived on a network drive were used for tracking early pipeline entries and grant budget information. None of the databases could handle important

requirements of the Foundation's work, such as cross-programmatic grants, and the ongoing maintenance of the custom solution was cost-prohibitive. When Blackbaud announced that GIFTS was being sunsetted, the Foundation decided to investigate options for a scalable and stable platform that would streamline grants management.



Multiple bottlenecks negatively impacted productivity

The Foundation's previous solutions required staff to "pass the baton" in order to push a grant through the process. Grants were developed in a very linear fashion; staff was unable to simultaneously access and work on the same grant, resulting in bottlenecks that impeded progress. This issue was compounded by a lack of transparency and understanding of where in the process a request actually was at any given time and what issues may have arisen to prevent it from moving further. Communications important to the development of grants were

offline in individuals' inboxes rather than in a central location where key stakeholders could quickly access important correspondence and related documents.

In addition, the databases were not cloud-based. Remote access to the grants management system was nearly impossible from an off-site location, which limited the potential for work to be completed or questions answered from anywhere but on the Foundation's premises.



Time-consuming manual work required to manage the grants pipeline

Grants pipeline management was cumbersome and labor-intensive. In order to forecast grant payments, senior staff had to manually update an Excel spreadsheet daily, introducing the possibility of human error. Consolidation between the grants pipeline

and details about awarded grants required an intensive de-duping effort that was only feasible to complete once per month, due to the time commitment involved which resulted in static, non-current data that was useless for planning and budget forecasting.



Limited visibility into the grants management lifecycle, post-approval

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"We worked closely with Exponent Partners to make important decisions that made it possible for staff to use the system as-is today, but we know we're not done! We have a roadmap that guides our work as we continue to develop the platform in the years ahead, ensuring that it continues to meet our evolving needs."

– Samantha Shain, Database Administrator, William Penn Foundation

Solution

William Penn Foundation was committed to finding an extensible grants management solution that could be customized to meet the diverse requirements of the organization's grantmaking processes. Having a cloud-based solution was important too as it would give staff timely, remote access to data via a phone, mobile device, or computer.

Salesforce and foundationConnect quickly surfaced as the frontrunners during the evaluation process as the integrated solutions met the organization's short- and long-term needs and requirements.

In November 2017, William Penn Foundation deployed Salesforce and foundationConnect, marking a milestone in the transformation of the organization's technology infrastructure and grants management. The organization implemented foundationConnect's program modules, payment schedules, reporting, and Grantee Portal. This standard, out-of-the-box functionality was enhanced with customized features that were implemented by Exponent Partners.

The new system, known internally as the "Grants Unified System" and fondly referred to as "GUS", also includes third-party apps such as Conga Composer, Conga Batch, and Outlook Connector. The Foundation has also integrated a Box solution for its document management. "Our system is now considered best-in-class by other peer foundations who are striving to streamline and optimize their grants management," explained Samantha. "We're proud to be getting recognition externally as a thought leader in this area."





Results



Increased automation has eliminated major bottlenecks and freed up resources

Notifications for incoming inquiries and applications are now designed in a more parallel process. Program Officers and Grants Management receive notifications of all incoming forms simultaneously, removing Grants Management team as the information gatekeeper. This streamlined process ensures that grants reach all the right people in a timely manner.

Communications related to grants are stored within the grant record for easy reference by any staff. Documents are also saved in a Box folder embedded within each grant record. Electronic files have completely replaced the need for paper files and file cabinets.

The payment approval process has been completely transformed from what was a paper-intensive, and labor-intensive process to a simplified paperless, online process

custom designed through Exponent Partners. Digital signatures and electronic reports have replaced the need for manual printing and filing of payment approval worksheets. Additionally, payment projections are also readily available for the Investments team through scheduled monthly reports. With less time being spent on mundane tasks, such as consolidation of information from various spreadsheets or cross-referencing paper and electronic files, staff catch discrepancies sooner and have time to pursue new or more challenging issues related to its grantmaking.

Lastly, enhanced financial and legal review functionality have replaced the antiquated paper-version of this documentation with the design of electronic compliance and financial assessment records embedded directly within the grant record.



Enhanced visibility into real-time information and improved data integrity

Staff can now quickly and easily access real-time information on active grants, due dates, and budget. “Team members are no longer storing data on our network drive and emailing spreadsheets around,” said Samantha. “They can see a representation of all of the payments in the system, and can also modify their own pipeline records,

so that it is reflected in the budget at the appropriate time.” This decentralized approach to budget access and updates has increased accountability. Also, with rules in place, data integrity issues, such as mistakes or missing information, are quickly identified and can be addressed immediately.



Increased collaboration between the foundation and grantees with the Grantee Portal

Grantees can now create original project deliverables (RMAs) in a custom Visualforce page built by Exponent Partners as part of the Grantee Portal. According to Samantha, “Our grant making is now more collaborative with our grantees—we can see drafts in the system and reopen applications when we need to adjust for added clarity. Also, we have built a structured feedback loop—during grant development as well as during the active grant period—that should eventually lead to better grants.” The new method for tracking RMAs in both interim and final reports has

given Program Officers more visibility into the progress of individual grants, as well as dashboard elements that show upcoming grant deliverables. Finally, emails between grants staff and grantees are also housed in the Salesforce system thanks to seamless integration with Outlook. This centralized approach to tracking correspondence, activities, and key documents has enhanced transparency and knowledge sharing, while ensuring that grantees aren’t bombarded with similar requests from foundation staff.



Improved ability to handle cross-programmatic grants

foundationConnect’s architecture allows the organization to create a single grant record but share the payments among one or more program budgets. “We are now able to easily handle cross-programmatic grants in a way that accurately reflects the related

budgetary impact in different areas,” explained Samantha. Native foundationConnect functionality was enhanced with a Visualforce page, built by Exponent Partners, to provide more granular details about time spent on general operations support.



More sophisticated reporting capabilities

Detailed dashboards tailored to end users' unique needs make it easy for staff to know where they need to take action. Dashboards have been designed to provide a visual queue for staff as to what needs immediate attention and a look-ahead to what's coming due in the coming two to three months. Installation of Conga, a third-party app, enables staff to

report on various grant details, including RMAs. The Foundation also uses Conga to track payments—an effort that used to be manual. Director Discretionary and Matching Gifts are also tracked and reported on thanks to a separate, but integrated giving portal created by Exponent Partners.



Extensible platform that supports the organization's broader vision

The William Penn Foundation will continue to work with Exponent Partners to bring the organization's Communications team onto the Salesforce platform for their constituent relationship management (CRM) needs. This follow-on effort will build the Foundation's integrated organization-wide solution and

provide an enhanced ability to build out contact attributes in a more sophisticated way. This valuable data can then be used for granular segmentation and targeted outreach to people from the general public who might be interested in engaging with the William Penn Foundation.



Photo Credit: Hannah Morales