

Grant Management for Community Planning & Advocacy Council

About The Client*

Since 1938, Community Planning & Advocacy Council (CPAC) has advanced social, racial, and economic justice to promote successful individuals, strong families, and thriving communities. They accomplish this by procuring local, state, and federal government funds. They provide continuous quality improvement through monitoring and evaluation of funded services. CPAC works with over 300 social service agencies, health agencies, and numerous public and private organizations based in Camden County, New Jersey.



Challenges

As an incredibly popular grant maker in New Jersey, CPAC welcomes nearly 60+ grant applications a year. To avoid any bias in their application review process, CPAC includes roughly 16 Community Reviewers for every grant application cycle. To avoid internal staff having to enter applications themselves, CPAC implemented Salesforce Sites. However, this implementation included 6 different sites, and it left a lot of unknowns on the table when it came to quarterly, mid-year, and annual reporting.



Grant seekers and reviewers were not able to self-register; therefore CPAC's internal staff needed to create community users manually in Salesforce and provision them the proper permissions.



CPAC's internal staff would go to each site to access applications, uploaded documents, budget requests, reviews, and other important information related to the grant lifecycle.



A grant seeker needed to access a different site for each fund they wanted to apply for.



Community Reviewers needed to toggle between one browser tab to view an application and another browser tab to submit their review for that application.



CPAC's internal staff would use the externally facing Salesforce Sites to gather data they needed for quarterly, mid-year, and annual reporting.

It was evident that this model wasn't scalable for CPAC, so they looked for Salesforce support to help reduce staff time provisioning users, enhance their grant reporting, and create a better internal and external user experience *Enter: Summit One.*

Our Solutions

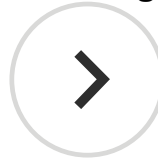
Before implementing our solutions, we hosted four “Exploration” workshops to establish the 5 top desired outcomes of the new process. After navigating through pain discovery, workflow overviews, and resource availability and constraints, we started phasing in our solutions:



Simple Onboarding. Our objective was to remove the burdens that came with managing and provisioning users across 6 different sites. We wanted to create a seamless onboarding experience, using a single portal for Grant Seekers and Community Reviewers to go to when either applying or submitting reviews.

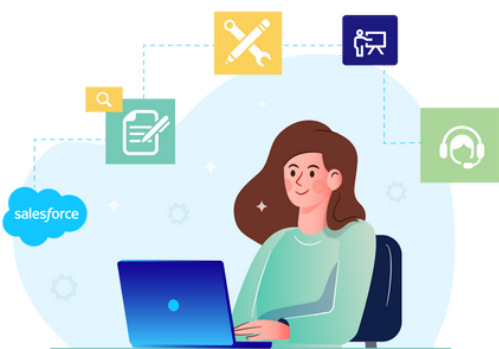
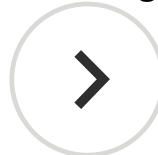
To address this, we took the Funding Program Portal from Salesforce's Grant Management Module and customized it for CPAC.

Click Image



Multi-Step Applications and Reviews. The processes would be broken up by each fund. In addition, Grant Seekers and Community Reviewers would be able to easily save their work and return to it at any given point.

Click Image



Summit One

Communicate. Collaborate. Create

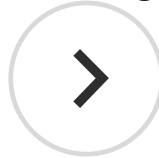
Our Solutions



A Single Pane of Glass. The mission here was simple - unify an application with important documents, budget requests, disbursements, and corresponding reviews. Then, present it to users in a single, easily accessible view, all without having to navigate away from the Salesforce platform. CPAC didn't want to go to a Salesforce Site to get the information they needed, so we aimed to display information in a clear, concise manner in formats that felt familiar to their team.

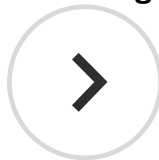
Check out how we created this experience for CPAC using Salesforce's Grant Management module plus customization of our own.

Click Image



Simplified Reporting. Our goal was give CPAC's internal staff easy access to all of the important metrics pertaining to the grant management lifecycle.

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Results

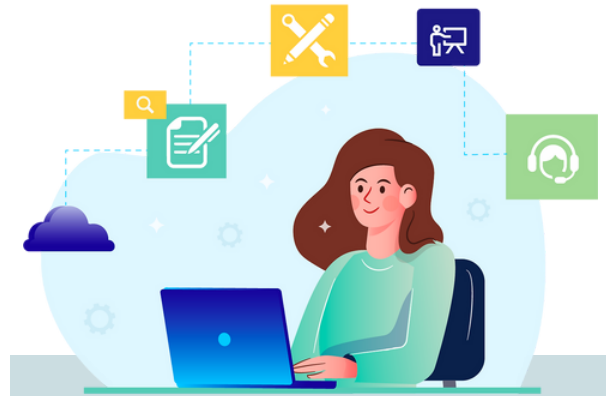
\$30,000

saved in Grants Management implementation costs compared to market rates.

Our solutions dramatically improved CPAC's grant management lifecycle, resulting in a better internal/external user experience, better reporting, less wasted time, and satisfaction with the Salesforce platform. We accomplished these goals while staying well below market rates for a Grants Management implementation.

Want to save time and resources for your non-profit?

Contact us today!



About Summit One

Summitone.io is committed to helping our clients understand how Salesforce and other internal business applications they use work through hands-on training, up-to-date documentation, step-by-step guides, video explanations, and more. Our team customizes solutions for Nonprofit organizations to address their greatest implementation, administration, integration, and data migration challenges.