

GrantStreamnews

Sharing knowledge, insights and experience

Welcome

Contest alert!

The Name Game

Could we have chosen a more boring name for this newsletter?

Help us pick a better name (but not during working hours of course!).

Send us your suggestions by **May 15th** and we will donate \$50 to the CRA registered charity of the winner's choice.

We have no shame — puns and bad plays on words are heartily encouraged.

THERE HAS BEEN ONE CONSTANT IN THE growth of GrantStream: the remarkable, unwavering support of you, our clients. Since those first few companies put their faith in us almost six years ago, any new business we've developed has been the result of the tireless praises you sing to potential clients. For that we will always be grateful. Likewise, our ability to continue to improve our products and services has largely been due to the ongoing feedback, suggestions and challenges that you provide to us.

Recently, I was having lunch with a long-time client and I suggested that our *MatchRight*[™] program could reduce the time required to administer her company's Employee Volunteer Granting program. The response was immediate: "Matthew, why didn't you tell me about this sooner?"

I was speechless. (All right, for those who know me, I'll admit, only figuratively speechless!) Nevertheless, it did strike me that perhaps we need to find a way to make our current clients aware of some of the new modules and features we have to offer and some improved ways in which we can add value to your community investment and sponsorship programs.

GrantStream News was born.

Our aim is to continue to meet and exceed your

expectations, adding value to your programs in any way we can.

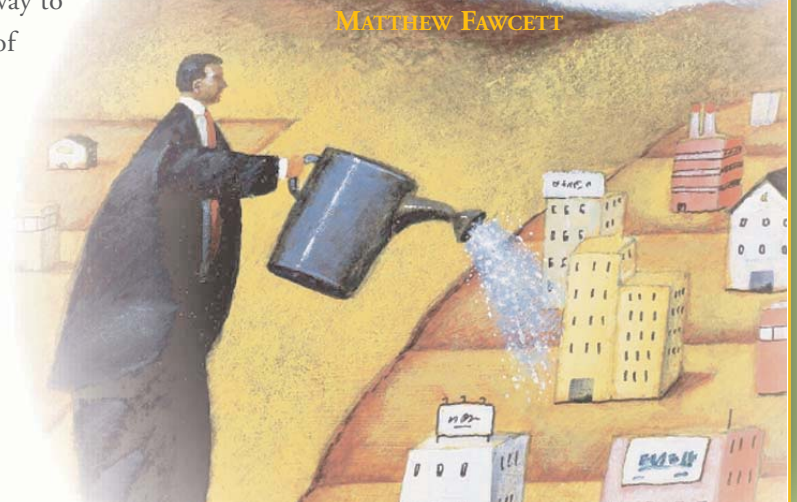
It is with this objective in mind that we launch this newsletter, hoping we can:

- ☀ Describe new modules, product features and innovations to better meet your needs;
- ☀ Highlight areas in which our consulting services can further strengthen your current initiatives; and,
- ☀ Tell you how other companies are using GrantStream technology and the impact it has had on their programs.

On behalf of Richard Pringle and the rest of the staff, I welcome you to our first edition of **GrantStream News**. We'll do our best to keep it concise, easy-to-read and on point. We look forward to your questions and comments.



MATTHEW FAWCETT



GrantRight™: a customizable solution

When cookie cutter just won't cut it

OVER THE PAST FEW YEARS, WE'VE SEEN A LOT OF changes to community investment programs. Creative and unique sponsorship and grant programs — ones that stand out, target specific stakeholders, and match business strengths — are now the trend. These changes have underscored the advantages of a **customizable grant management technology**.

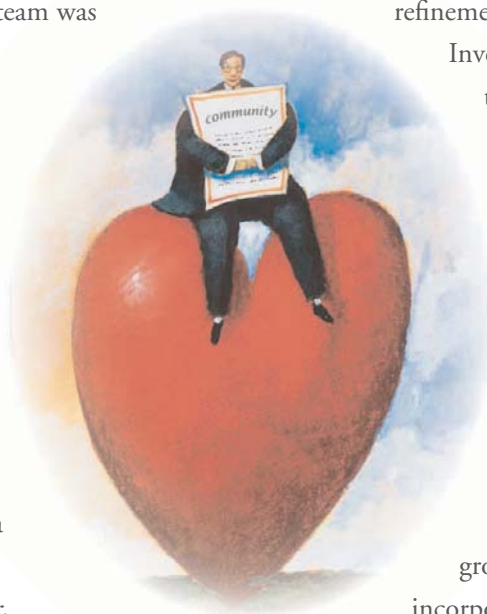
When Tara Black, Advisor, Public Affairs at **Shell** started to talk to us about using *GrantRight™* to manage the **Shell** Environmental Fund, she realized that “the unique features of her program meant a cookie cutter solution just wouldn't work.” She needed to manage and accept attachments and share applications with external review panels. With more than \$800,000 in donations made in 2005 at a maximum of \$5,000 each, her team was kept busy manually entering applications and attachments. “Understanding the vast possibilities and limitations of systems is hard if you don't understand technology,” says Tara. “We hired GrantStream because of their user friendliness; they translated our database and application needs into a technological solution, all the while keeping a focus on customer service.”

Christi Cruz, Senior Manager, Community Investment at **TELUS** was facing similar challenges. The **TELUS** executive team set a national goal for **TELUS** to become Canada's premier corporate citizen. They wanted community leaders and citizens to take an active involvement in its donations and sponsorship program. The result: the establishment of Community Boards in 7

communities. These boards meet quarterly to decide how best to allocate more than \$3.5 million to local charities. The boards needed to review applications and **TELUS** had to rework their application to accommodate the specific needs that these boards required. This had a direct effect on how they used *GrantRight™*. As Christi puts it: “Matthew and his team took the standard, *GrantRight™* product and tailored it so seamlessly that it is almost as if someone from **TELUS** built it. He took the time to really understand our requirements, our corporate identity, our politics and our personalities! As a result, he knew our needs and our challenges.”

EPCOR is another example of GrantStream's customization capabilities, again a result of refinements made to their Community Investment program. **EPCOR** shifted their focus to engage the communities in which they have operations. Centred on the theme of excellence, **EPCOR** has established a Sports Excellence Fund and a Youth Excellence Award. While they use *GrantRight™* to manage their corporate donations and sponsorships, they needed to customize it to serve a targeted group of applicants. They wanted to incorporate maps into the form and develop a method to notify and screen-out applicants who were not from the eligible communities. “The biggest realization for me,” says Joanne McDonald, Manager of Community Investment, “was how reliable Matthew and his team were. My past experience with other IT projects has taught me to be skeptical about the promises of what

...continued



can be done. But with GrantStream, we'd ask for something and 99% of the time we'd be told it could be done."

The impact of customizing *GrantRight*[™] to better suit the needs of these companies was immediate.

When **Shell**'s application form went live in January 2006, more than 250 applications were received online and only 40 came in the mail and had to be manually entered. "Our administrative assistant comes into the office singing these days," says Tara. "It's a huge time savings for her!" Even the applicants — mainly small, grassroots organizations — have praised the new approach and have had no trouble filling out the application form and attaching documents.

At **TELUS**, the implementation of a consistent form with centralized document management for their community investment program had already lowered administration work. When **TELUS** first started using *GrantRight*[™] in 2002, workload was reduced by 25% and the customization for the **TELUS** Community Boards has allowed them to introduce over 200 new projects with minimal resource impacts. "Another great benefit that we've just enjoyed," says Christi, "is that it's very auditable. We used *GrantRight*[™] to pull together

information for our CSR report and the auditors were impressed by the auditability of the product."

The results at **EPCOR** have also been positive. Everything is now electronic. There is no need to photocopy and distribute documents to community sites and review panels. In fact, the whole review process is faster and more consistent. "We were recently asked to identify operational efficiency initiatives," says Joanne, "and we used *GrantRight*[™] as an example."

We are thrilled to be able to share these success stories with you. Our work with **Shell**, **TELUS** and **EPCOR** on these customization projects has pushed the boundaries of *GrantRight*[™] and demonstrated its flexibility. "I love working on these projects," says Matthew Fawcett of GrantStream. "I try to really understand a company's needs and then, by asking questions, making suggestions and sometimes doing some creative thinking, work with my technology team to develop a practical solution that might hopefully even exceed their original expectations."

We'd like to thank **Shell**, **TELUS** and **EPCOR** for letting us tell their customization stories.

If you're interested in seeing what your options are, please contact Matthew Fawcett: (514) 481-5700 or mfawcett@grantstream.com. □

The not-so-breaking news

IMAGINE CANADA RECENTLY ANNOUNCED CHANGES TO ITS 1% FORMULA. To qualify for Caring Company status, businesses must still give 1% of their pre-tax profits to the community, but they are no longer required to direct at least 80% of their contributions to registered charities. This requirement has been removed. Now, companies can calculate the 1% based on any combination of five eligible types

of support: donations to registered charities; donations to nonprofits; community economic development projects; community sponsorships for public benefit; and employee volunteerism. We know many of you are Imagine Caring Companies. If you want to learn more, visit www.imagine.ca or contact Jennifer Semple at (416) 597-2293 ext. 254 or jsemple@imaginecanada.ca. □

Tech Q&A (Well, you asked!)

Question: How do I export a report from Crystal Reports into another application, such as Word or Excel?

As you know, Crystal Reports will only let you view or print the reports, cheque requests or approval letters it produces. It does not let you change the wording in the report or email them out to other people. In order to do this, you must **export the file**. Exporting is actually really easy. Just follow these simple steps:

1. Click the **ENVELOPE ICON** at the top, left-hand corner of the page.
2. From the select box, **CHOOSE THE FORMAT** you want (e.g. Microsoft Word, Excel* or Adobe Acrobat).
3. **CREATE A NAME** for the file where it says "File Name."
4. **CLICK "OK"** to export the file.
5. A pop-up will tell you the file has been exported. **CLICK YES** to open the exported file.

*When exporting reports to Excel, choose "Excel (data only)" for more data flexibility. Remember, you can always call us if you need to.

Exciting *MatchRight*[™] upgrades (we're easily excited!)

THIS YEAR WE'VE STARTED TO IMPLEMENT improvements and upgrades to *MatchRight*[™], our gift matching and volunteer grant management product. *MatchRight*[™] empowers employees to manage their own accounts and simplifies the request and approval process. Normally accessed from your intranet, we've worked to make *MatchRight*[™] really easy to use. Passwords are now made up of combinations of words and numbers that are easy to remember, such as **RedRock29** instead of **Lk8YD95fp**. And navigation is more straightforward.

We have also developed modules for "event

specific" disaster relief initiatives. When Katrina ravaged the Gulf Coast and Pakistan was devastated by earthquake, some *MatchRight*[™] clients activated the "disaster relief" component to accept requests for donation matching. In addition, *MatchRight*[™] can be used during **United Way** matching campaigns, making it easy for you to download data directly to HR for payroll deductions. Again, seamless to your users and centrally managed by you.

If you want to learn more, please call us and ask for a demo. □

For the number lovers...

Canada's Nonprofit Sector. It's a powerful force.

- There are **161,000** nonprofit and voluntary organizations in Canada and slightly more than half of them are registered charities.
- **50%** of these organizations are run entirely by volunteers.
- Canadians have taken out a total of **139 million** memberships in these organizations, an average of **4 memberships per person!**
- The sector employs over **2 million** people.
- It's an economic powerhouse with revenues totaling **\$112 billion**.

For more information visit Statistics Canada.

For the cynics...

161,000 non-profit and voluntary organizations applying for support?!

Wow. Aren't you glad you're using GrantStream to manage those requests?

The Inside Scoop

IN AN AUDACIOUS AND PERHAPS MISGUIDED move, we've decided to include a column in each newsletter that gives you the inside scoop on a GrantStream personality. What are the quirky, unknown facts that make us who we are? And what do we bring to the GrantStream team. I guess the best place to start is at the beginning.

As you probably know, GrantStream was started in 2000 by Matthew Fawcett and Richard Pringle. But did you know that these two characters have been friends since university? (That was back in the Miami Vice days of leather ties and pastel sports coats!) As a result, they have an endless stockpile of eye-rolling "remember when" stories that get told and retold to the dismay of all of us!

With plenty of good humour and hard work, these two have built GrantStream into a company of nine employees with offices in Oakville, Ontario. In addition to Matthew and Richard,



From left to right:
Rob, Elena,
Joe, Monique,
Wally, Josh

the GrantStream crew includes **Monique Belzile** and **Elena Gourlay** in customer service; **Rob Starr, Josh Davis, Wally Lawless** and **Joseph Hachey** in the development team; and **Helen Simpson Seibel** (that's me, editor of this newsletter) in the consulting group.

As the most recent addition to GrantStream, I've been voted the guinea pig for the first inside scoop section. (Which is probably appropriate considering I own a guinea pig. It's a very long story.)



Helen
Simpson
Seibel

Some of you already know me. I was most recently Director of Communications with the Imagine program at the Canadian Centre for Philanthropy (now known as Imagine Canada). Before that, I managed one of Ericsson's global corporate citizenship programs where my

arguably unhealthy appreciation for spreadsheets came in handy! I'm a self-declared cheese-aholic (who isn't?) and I've spoken to the Queen twice (which may be why Matthew and Richard hired me!).

As we grow our consulting practice, my skills in partnership development, the nonprofit sector and program management will join Richard's to enhance our offering. I'm looking forward to it. □



Want to
get in
touch?
Here's who
& how:

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