

GrantStream Quarterly

Sharing knowledge, insights and experience

From the editor

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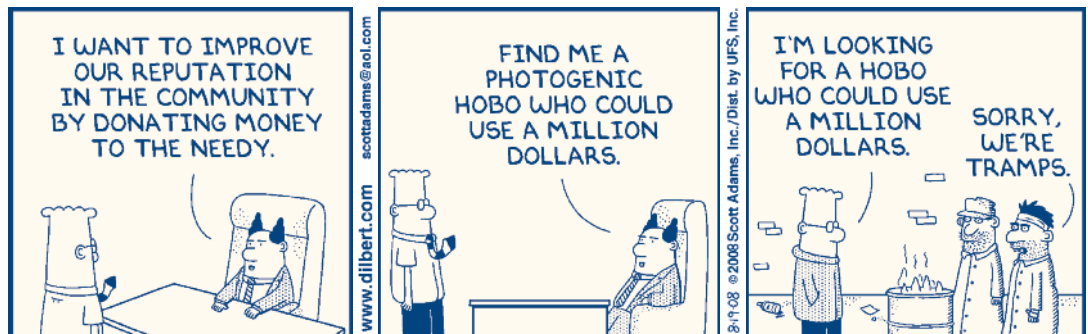
Claudia
Garcia

EVEN THOUGH IT'S *TECHNICALLY* STILL FALL UNTIL THE calendar says December 21, the spirit of winter seems to have made itself at home early this year as the cold has sneaked in and of course, we're surrounded by countless reminders that the Holidays will be here before we know it. Before we bid you happy holidays however, we're pleased to bring you one more installment of GrantStream Quarterly for 2008.

To those of you who took the time to fill out our survey and tell us what you thought of our newsletter, we thank you for providing your feedback and some great ideas! In response to your suggestions, we've added a few new features to the newsletter: In each edition, *GrantStream in Action* will highlight how one of our clients is using our technology to achieve their community and business goals; you are also invited to submit questions to our new *Ask a Consultant* feature. You told us the kind of information you wanted to read about, and as always, we're glad you did. We hope that you will find the content and format of the improved newsletter better suited to your needs.

We'd also like to remind you that as every year, the GrantStream office will be closed for the holidays beginning the afternoon of December 24th, and will reopen on January 5th. If you need urgent assistance during this time, you may contact oncall@grantstream.com.

And now, since they really are just around the corner, I'll take this moment to wish you Very Happy Holidays on behalf of the yet ever-expanding staff here at GrantStream, and a great start to 2009! □



Technology Updates: Coming in 2009

Manage GrantRight® Auto Emails with the Email Maintenance Tool

Scheduled to be implemented throughout 2009, this very handy new **Email Maintenance Tool** will allow managers to view the content of auto emails that have gone out to applicants in response to their requests. The tool will also make it possible to edit scheduled emails to include personalized messages to selected recipients, such as reasons for decline or any additional special instructions. For those clients who choose to notify approved applicants by email, the tool will allow the addition of personalized comments pertaining to the initiative being supported.

Log Your Grant Management Workflow

Prompted by more rigorous auditing practices, the upcoming **Audit Logging** feature was designed to make it easier to know who saved status changes to a file, from receipt to decline or approval and beyond. A small but useful feature, **Audit Logging** will be helpful to clients that may have several different people handling each file. Ultimately, this feature is positioned to log an advanced workflow of data changes made by multiple users and decision-makers.

For more information on these or any of our other technology products, please contact [Matthew](#).

We don't want to be just another supplier

GrantStream has always tried to make each of our clients feel as though they were our only client. (It was much easier when there was only one!) We pride ourselves in our commitment to client support and the positive feedback many of you have provided over the years inspires us to strive to be even better. As our client list grows, so too does the need to grow our staff and develop our internal processes so that we can continue to provide you with the high level of service you deserve. As a small company this can sometimes be challenging and we know that from time to time we've taken longer than we'd like to get back to you on concerns you've raised or new projects you've proposed. We are sincerely grateful to every one of our clients for your patience during these times and also for working with us to provide as much lead time as possible for customization or development requests whenever possible. We have added staff to our Client Services and Technology teams this year and will continue to do so in 2009. We hope that you will bear with us as we grow and train our staff and should you have any concerns, please don't hesitate to let me know directly. Our objective is to be your business partner of choice — not just another supplier! □

[Matthew Fawcett](#), Co-President



GrantStream in Action: A little technology helps Suncor Energy's United Way campaign go a long way

FOR YEARS, THE **UNITED Way** CAMPAIGN at **Suncor Energy's** head office in Calgary had been posing a challenge. Pledges were being submitted to the campaign in a multitude of formats, most often paper, making it difficult to gather accurate results in a timely manner.

In 2006, GrantStream helped Suncor introduce an electronic pledge form that could be accessed online through their *MatchRight*® program. The solution provided a way for Suncor to house all of their community programs in one central location.

The accessibility of the pledge form coupled with real-time reporting abilities helped inject a little added Suncor brand of energy into the campaign, making it easier to build awareness among employees, encouraging competition between departments, and showing employees previous years' benchmarks with the goal of surpassing those totals. An added benefit was that as employees logged in to the system to make their



United Way pledges, they were also encouraged to review and apply to other grants that were available to them.

This year, the United Way campaign at Suncor's Calgary office alone raised over \$650,000 in donations*, 83% of which were entered through the *MatchRight*® system. The total funds raised were a substantial increase over previous years. 2008 also saw an increase in donations of \$1,000 or more. *MatchRight*® has also made it possible to generate real-time reports on employee donations and allowed for much easier tracking, which has significantly reduced the amount of time the Payroll department spends working on the United Way campaign each year.

A sincere thank you to Ashley Cormier and Jillian Edmonds at Suncor for sharing this story with us. We are always delighted to hear that we've helped you. □

*Out of respect for client confidentiality, the inclusion of all figures in this article has been approved by Suncor Energy

Ask a Consultant



My boss keeps harping on measuring our community involvement program. I don't know where to begin... any ideas?



Measurement and Evaluation (M&E) should be an essential element of every company's community involvement program. It lets you see the impact of your investments so you can determine how best to allocate your resources. Here are a few guidelines to keep in mind:

- 1 Start with your goals in mind.** Ensure you have clear objectives for your program and measure and evaluate against those goals.
- 2 Integrate M&E from the beginning.** Include relevant questions in your application form that you can use for M&E purposes later.
- 3 Give ample notice to your community partners.** Inform your applicants (through your community pages and your application form) that they will be expected to assess their performance against their stated objectives if they receive a grant or donation.
- 4 Budget time and resources for measurement.** You've already accounted for the time and personnel to review proposals. Follow-ups are even more important to the future success of your program.
- 5 Keep it simple.** Measure only what can be easily measured and build your M&E approach from there. For example, focus only on donations that exceed \$5,000.
- 6 Less is more.** Don't collect information you aren't going to use or act on, such as evaluating a one-time donation based on an executive decision.
- 7 Educate everyone involved.** Make sure your staff understands the goals of the process and their role within it. Manage senior executives' expectations regarding the feasibility of collecting the information they want.
- 8 Review and refine your measurement activities annually.** Take what you've learned and apply it to improve your program and make the measurement process more efficient.

If you'd like help incorporating an M&E component into your community program, our GrantStream consultants can help. Get in touch with [Richard](#) for more information on how we can help make your community program more effective. □

If you have a question you'd like answered in our next issue, please email it to [Claudia](#). While we can only include one in each newsletter, we'll make every effort to personally provide you with an answer.

News

Useful Reading:

Reports Check the Pulse of Canadian Communities

Each fall, community foundations from across Canada release their annual *Vital Signs* reports, which like an annual check-up, set out to gauge the health and vitality of our communities by grading them across various quality of life indicators. The reports are designed to improve the effectiveness of the community foundations' grantmaking by highlighting issues and opportunities in each community. The information contained in these reports is similarly helpful to corporate grantmakers wishing to learn of opportunities to make the greatest impact with their community investment contributions. To read the full reports on fifteen cities from Saint John to Vancouver, visit www.vitalsignscanada.ca.

New research on Corporate Community Involvement

Imagine Canada has just released *Corporate Community Investment Practices, Motivations & Challenges: Findings from the Canada Survey of Business Contributions to Community*. It is available for [purchase](#) with special rates for Imagine Canada members.

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News continued

Our Co-Presidents Spread the Good Word about Community Investment

Richard and Matthew had the opportunity to share their Community Investment expertise at a couple of exciting events in November.

Matthew was at the **Conference Board of Canada** in Ottawa on November 12th, presenting to the **Corporate Community Investment Council** on the importance of *Measurement & Evaluation*.

Not to be outdone by Matthew, Richard too presented on *Measurement & Evaluation* at the **Association of Corporate Grant Makers** in Toronto, on November 25th. He was also in Cleveland in late October presenting to the **Ohio Grantmakers Forum** on the *Pros and Cons of Signature Programs*.

Next up – Richard teaches the annual course on *Breakthrough Signature Programs* from February 4-6, 2009, in San Diego. Perhaps you can plan a getaway from the February blahs with an educational trip to California? The course is part of the **Boston College Center for Corporate Citizenship's** Community Involvement programs for managers. □

The Inside Scoop A peek into the lives of GrantStream staff



Wally Lawless

Wally has a rocky reputation on GrantStream's Technology team — he's steady as a rock, that is. Amidst heavy workloads and looming deadlines, Wally is known for remaining cool, calm and collected under pressure. Besides being GrantStream's resident online

security expert, Wally has been pivotal in making our *MatchRight*® technology adaptable to virtually any employee grant program, and has also built and maintained most of the United Way campaigns that are up and running. Before writing code for clients, Wally likes to take the time to speak directly to them to truly understand and incorporate the particularities of their programs.

Wally recently married Erin, his high school sweetheart, in a beautiful autumn ceremony. You could call Wally a hopeless romantic for the new millennium — how else would you describe someone that built an entire website as an ode to the union with his beloved complete with photo galleries, bios, romantic retrospectives and a Contact Us form? Recently, Wally and his wife made a generous donation to **Tree Canada** in honour of all those who attended their wedding.



Joseph Hachey

Some say Joe has an almost pathological need to be a part of every decision concerning GrantStream technology. While his lengthy but well-reasoned arguments sometimes provoke a not so subtle eye roll from Matthew, he is also the first to admit that Joe's passion for constantly improving

the technology is unsurpassed. Joe has had a very strong impact on the shape of our *GrantRight*® Technology, and if developers had superhero names, Joe would be "The Implementer", as he's often the one tagged to implement new features and capabilities.

Outside of work, Joe is constantly giving himself a challenge to work towards. This summer, after months of training and anticipation, Joe completed the 2008 NYC Central Park Triathlon. Although he hasn't really run since that day, he has since taken up "Professional Snowboarding," quite a feat for someone who had never snowboarded before this year. In November, Joe grew an impressive moustache in honour of **November**, a November initiative in which men around the globe grow moustaches to raise awareness about prostate cancer. However, Joe's "mo" promptly disappeared on December 1st at the insistence of his significant other, Ashley! □



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Here's who
& how:

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