Choosing a Platform for Philanthropy: Grants Management & Beyond

Kathy A. N. Grant, Kelly Hayashi, Hannah Kahn, and Steve Andersen
Objectives

- Discuss what a Platform is and how it can be useful in Philanthropy
- Provide perspectives on why a Platform provides both today’s solution and opportunity for tomorrow’s expansion.
- Share key takeaways about the Platform journey
Hannah Kahn, Director of Grants Management
Chan Zuckerberg Initiative

- $45B pledge in 2015
- Domestic and local grants
- Impact Investing
- $1.5B in grants and investments
- 3 Initiatives

- Grants team: 5+
- Tech team: 100+
  - Grants systems team: 3+
- Salesforce
  - Native Grants Management

Growth
Start Up
Maturity
Regeneration

Proving
Planning
Implementing
Expanding

Right Now
Starting Place
Kelly Hayashi, Grants Manager
Heising-Simons Foundation

- Founded in 2007, shift in 2012
- Domestic and local grants
- $100M/y in grants (~400)
- ER, DCAs, PRIs
- 5 Programs

- Grants team: 4
- Tech team: 2+
- Salesforce
  - foundationConnect

Growth

Maturity

Starting Place

Regeneration

Proving

Planning

Implementing

Right Now

Expanding
Kathy A.N. Grant, Deputy CIO
William and Flora Hewlett Foundation

- Founded in 1966
- Domestic and International grants
- $400M/y in grants (~800)
- ER, ED, IRS permanent ruling
- 6 Programs

- Grants team: 7
- Tech team: 8+
- Salesforce
  - Native Grants Management

Growth  
Start Up

Maturity  
Proving

Starting Place

Regeneration  
Planning

Right Now  
Implementing

Expanding
What is a platform?

- App vs. Platform
- CRM Platform in Philanthropy
- Apps + Platform
App vs. Platform

**Application**
- Solves a single use case or collection of related use cases
- May allow significant customization, but within limits
- May have an API for integration with other software systems
- Applications may call themselves “platforms” when they really aren’t

**Platform**
- Provides the building blocks for solving diverse use cases
- Allows for significant customization, with broader limits than an App
- May have some Apps built-in that solve specific use cases
- Allows your Apps to easily use common data
- Often has “app store” for installing Apps onto the Platform
- Invests in very strong APIs
- Some assembly required
CRM Platform in Philanthropy

Problem: Data Fragmentation
CRM Platform in Philanthropy

Integration Layer

- CRM
- Marketing and Comms
- Grants Management
- Program Management
- Accounting
- Human Resources
- Financial Analysis
- Investment Management

Systems of Engagement

Systems of Record

Problems: Complexity, Stakeholder Experience, & Need for Apps
CRM Platform in Philanthropy

CRM Platform with Many Applications
(CRM, Marketing, Grants Management, Program Management)

Integration Layer

Accounting
Human Resources
Financial Analysis
Investment Management

Common stakeholder experience, simplified data landscape, app development environment
CRM Platform in Philanthropy

- Grants Management
- Document Management
- Document Generation
- Event Management
- E-Signature

Add-on Apps

Systems of Engagement

CRM Platform with Many Applications (CRM, Marketing, Grants Management, Program Management)

Integration Layer

- Accounting
- Human Resources
- Financial Analysis
- Investment Management

Systems of Record
# Add-on Apps

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<td><strong>And more...</strong></td>
<td>Slack integration w/Troops AI, Passage Technology Roll-up Helper</td>
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Why a platform?

- Relationships
- Big picture
- Need for flexibility
- Growth/headroom
- Strategic use of Tech
How to get there?

● Deciding to go with a platform
● Selecting the right platform and supporting systems
● Sequencing the path
● Rollout and Adoption
● Staffing before, during, after
Key Lessons

• Building right internal process is key
• Short term need vs. long term
• What is enough to prove your choice? Evaluation phase could be never-ending
• Be flexible in your roadmap. Be responsive to what makes sense at the time
• Emphasize the business training over platform training. Tech does not solve all your problems.
Discussion
Salesforce.com User Group
Thursday, 1-3pm
Aster 1
Thank You!

Hannah Kahn, Chan Zuckerberg Initiative
hkahn@chanzuckerberg.com

Kelly Hayashi, Heising-Simons Foundation
khayashi@hsfoundation.org

Kathy A.N. Grant, William and Flora Hewlett Foundation
kangrant@hewlett.org

Steve Andersen, Exponent Partners
steve@exponentpartners.com