CAF America Grantee Portal Case Study

Organisation Profile

CAF America, the Charities Aid Foundation of America, is a non-profit organisation facilitating charitable giving. They collaborate with corporations, foundations and individuals, providing a streamlined process for international grant making.

By navigating regulatory landscapes and with rigorous vetting procedures, CAF America empowers donors to contribute to diverse charitable initiatives worldwide through tax-advantage giving solutions. Their mission centres on fostering cross-border giving, connecting donors with impactful projects and promoting philanthropic engagement on a global scale. CAF America makes an average of 6,000 grants annually, totaling over $500 million in the last five years, to legitimate organizations in over 110 countries around the world.[1]

The Need

During a business process review session with NGO Business Services, the need for a centralised online portal was identified, to bridge the inefficiencies and communication gaps CAF America faced with prospective grantees.

The lack of a dedicated platform when liaising with charities was adding to the manual workload of CAF America staff. Multiple emails were required to send out and collect grant applications, collect reports on awarded grants and keep up to date essential information such as contact details and charity status. CAF America staff also had to manually update Salesforce records from information provided in emails and scanned documents which added a greater burden to their workloads. Additional confusion occurred when contacts left charities and secondary contact details were not provided to CAF America.

This fragmented process led to delays in grants being awarded, miscommunication, and increased administrative burdens.

The Solution

NGO Business Services developed an online portal fully integrated with CAF America's existing Salesforce CRM database. For this purpose, we used a Salesforce Digital Experience Site and Form Assembly, an online form tool.

We made use of a screen flow triggered from a button on the non-profit Account (NPO) record page which assigns the customer community login profile to the primary contact and sends a welcome email. This enables CAF America staff to easily invite NPOs to access the portal through the press of a button.
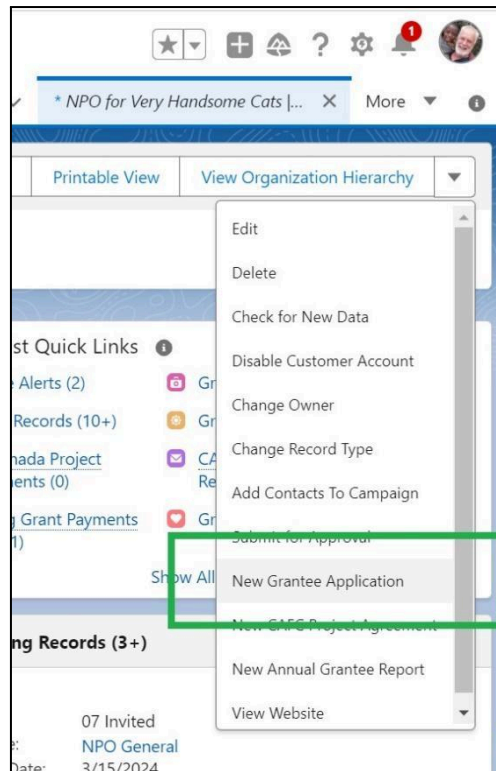
These new users can then set a password, amend their contact information and easily navigate through the portal using the tiles on the Home page or the menu bar at the top of every page.
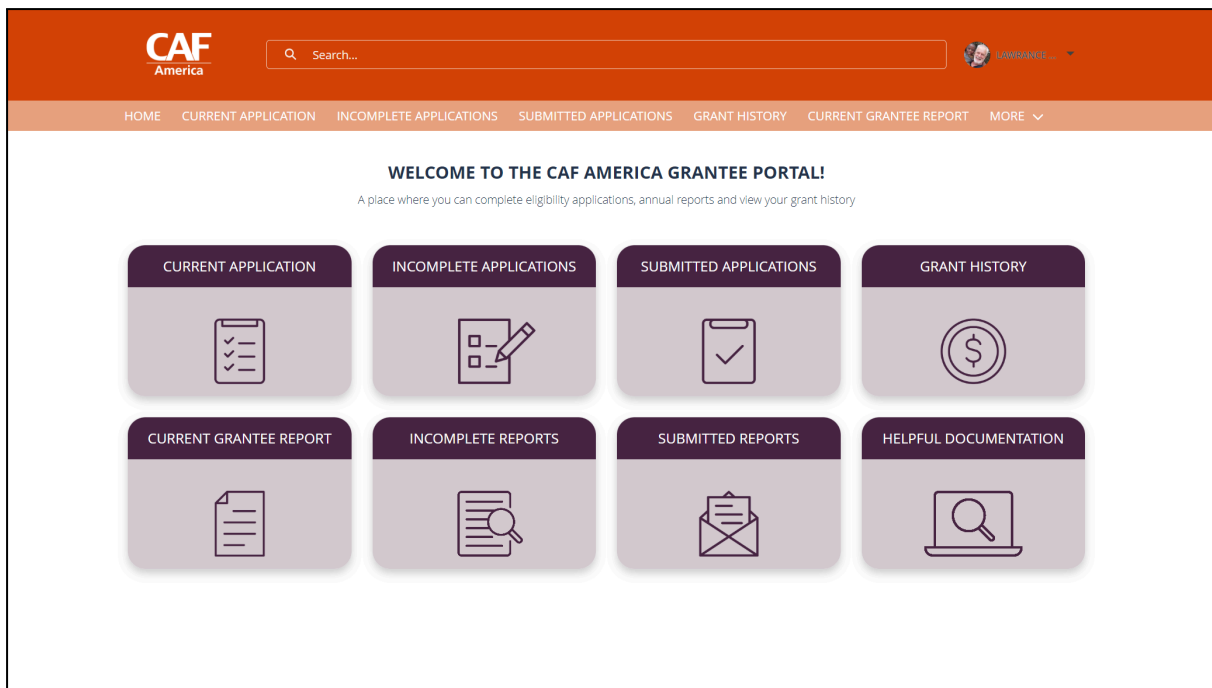
The Salesforce Digital Experience site is customised in the CAF America brand colours with graphics and brand logos throughout; including on the login and reset password pages.

Grantees can access and, where appropriate, edit their own information such as grant applications, grant history and grant reports

Any organisation and contact data already within Salesforce prefills onto the application. This helps the applicants to save time as they do not need to add this information every time they apply.

Using Salesforce list-views in the portal has the benefit of showing the most up-to-date data. Any changes made by CAF America staff to the status of grant applications are instantly available in the portal. In addition, users can sort and order records in list views based on specific fields.

Following changes to GDPR legislation in the EU and UK, CAF America required the portal functionality to be expanded to collect data privacy contracts compliant with this legislation. To achieve this, NGO Business Services added a review step within the application journey which directed all qualifying UK and EU applicants to complete a data privacy contract before they could finalise their grant application. We then created a link on the vetting record for staff users in Salesforce to countersign these contracts using digital e-signatures.

NGO Business Services have created infrastructure so that all qualifying applications and reports are chased with auto-reminders at specified intervals to further reduce the manual admin tasks undertaken by CAF America staff.

For onboarding new staff users in Salesforce, helpful alerts pop up whenever a record is missing data for moving onto the next stage of a process to ensure all fields are correctly populated.

The Outcome

The introduction of the online portal alongside the Grants Management system in Salesforce reduced the time and effort from charities to apply for, and report on CAF America grants and also provided them with greater transparency into the progress of applications and what was required of them. Use of online forms and field validation has resulted in much better-quality data.

The self-serve online portal and extensive automation through the use of Salesforce flows has had a significant impact on the efficiency of the CAF America team.

Following implementation, NGO Business Services has worked with CAF America to develop similar portals for CAF Canada and General Mills Grant Management.

Sources:

[1]FAQs CAF America 2019. Available at:
https://www.cafamerica.org/wp-content/uploads/FAQs_CAFAmerica.pdf.