A Smooth Migration from GIFTS to GivingData
The Conrad N. Hilton Foundation

OVERVIEW

After many years using GIFTS as their Grants Management System (GMS), the Conrad N. Hilton Foundation realized that their needs had grown beyond the capabilities of the product. Simply put, GIFTS was no longer able to support the way they wanted to work. The foundation's migration to a new GMS was originally planned solely as a software procurement project, aimed at replacing GIFTS with a new and improved platform. But in 2014, when the Hilton Foundation hired a new Director of Grants and Knowledge Management, the project was re-framed as a larger, more strategic initiative that included both the implementation of a more sophisticated grants management platform and the introduction of new processes to improve operational efficiency and support the foundation's growth. The Foundation looked for a partner that could not only offer an advanced GMS, but also line up a strong and strategic consulting team to transform Hilton's grantmaking practices. This is why the Conrad N. Hilton Foundation turned to GivingData.

THE SITUATION

After many years using GIFTS, the Hilton Foundation, with assets of $2.5 billion and over $100 million awarded annually, needed a modern grants management platform that could fulfill more sophisticated needs:

- Increased ease of use for all and, in particular, program teams;

- Better budget tracking;

- Grantmaking scenario planning capabilities;

- Better reporting;

- A pleasant and easy experience for online grant applicants ; and

- A simple and effective way to share information about grantmaking activity with the Board.

The foundation also saw the migration project as an opportunity to revisit and optimize its grants management practices and prepare for organizational growth by leveraging GivingData's sophisticated data management, collaboration, and decision support functionality.

Last but not least, the foundation wanted the migration from GIFTS to be as seamless and non-disruptive as possible, allowing the grants management team to remain fully operational throughout the implementation.

THE GIVINGDATA SOLUTION

To minimize disruptions, the GivingData team adopted a phased migration approach and gradually deployed new features over a ten-month period. During the first phase of the software overhaul, GivingData installed

their turn-key analytics, budget management, and scenario planning extensions for GIFTS, immediately providing the foundation with vastly improved access to their GIFTS data. At the same time, staff began exploring new forecasting and planning capabilities and a vision for the foundation's post-GIFTS future began to take shape.

While adoption of GivingData as a GIFTS overlay continued to grow, the GivingData team shifted the focus to a strategic engagement designed to better understand what Foundation users require to perform their day-to-day jobs. Using a simple process and a well defined methodology, GivingData consultants facilitated workshops with foundation executives, program staff, and the grants management team. The conversations focused on user needs, not features and technical considerations. From these discussions the software development requirements and priorities emerged.

The third phase of the engagement consisted in a gradual design and implementation of new GMS functionality to address the user needs uncovered in phase two.

Over a period of several months GivingData launched and refined several rounds of new GMS features while keeping GIFTS fully operational. The phased approach gave staff the opportunity to master one set of features at a time and incorporate new practices enabled by the software into their day-to-day work.

RESULTS

The Hilton Foundation, like many other Foundations, was ready to migrate to a new grants management system. They understood how a new GMS product could be transformative, and they understood the value of a partner with software and smarts. With GivingData's full-featured GMS, deep knowledge of how Foundations work, and strategic orientation, the Hilton Foundation found their partner.

The Hilton Foundation has garnered significant benefits from GivingData's solution. The foundation reports the following outcomes, among many:

- Improved and extended access to grants data across the foundation and for the Board, minimizing the burden on program staff;

- The ability to report on and analyze data to see trends that inform learning and decision-making;

- Improved grant lifecycle, budget, and task management;

- Fully integrated, cloud based document management;

- Enhanced cross-program coding standards and practices;

- APIs for publishing grants data to the foundation's website.

"We are pleased to partner with GivingData," said Edmund Cain, Vice President of Grant Programs at the Conrad N. Hilton Foundation. "The project has improved our access to grant information and created structures for more sophisticated knowledge management. As we focus on organizational learning, the GivingData platform will be a key tool for our foundation."