

New York State Health Foundation Deploys foundationConnect to Boost Productivity, Self-Sufficiency and Reporting Capabilities

“Reporting with foundationConnect is extremely comprehensive and powerful. There has been no reporting request that we have not been able to provide using foundationConnect.”

Mark Barreiro, Sr. Grants & Operations Manager, The New York State Health Foundation

The Challenge

A non-customizable grants management system kept the New York State Health Foundation (NYSHF) dependent on vendors to customize each of their desired enhancements. This dependency, along with the inability to automate workflows, caused delays and unnecessary human errors, slowing the grant making lifecycle down significantly.

Another challenge was analytics and reporting. “Reporting inconsistencies proved we were unable to effectively track and measure the impact of our grants,” said Mark Barreiro, Senior Grants & Operations Manager at NYSHF. The inability to control the formatting of their data caused excessive scrolling.

The Solution

foundationConnect provided NYSHF with the ability to customize and design fields and layouts. This has allowed for increased independence and self-sufficiency, enabling NYSHF to perform quick, everyday business needs and customizations without the need for a vendor’s expertise.

Sophisticated automation processes have boosted NYSHF’s productivity, helping end users and stakeholders keep track of deadlines and time-sensitive information. Ultimately, NYSHF was able to reduce delays and human error in the grant making lifecycle, while establishing a rich conversation between the applicant and program staff through the grantee portal.

NYSHF was able to eliminate information-sharing inconsistencies with custom reports and dashboards. It has even taken it a step further; using foundationConnect, NYSHF now schedules and automates the distribution of comprehensive reports to selected staff on a daily, weekly, and monthly basis, relieving grants management from manual distribution.



Customer Profile

The New York State Health Foundation (NYSHF) is dedicated to improving the health of all New Yorkers. To achieve meaningful impact, they make grants, inform health care policy and practice, and spread effective programs that work to improve New York’s health system.

About roundCorner

roundCorner is dedicated to helping enterprise nonprofit organizations, higher education institutions and foundations become truly constituent centered. We empower our customers with comprehensive fundraising, CRM and grants management solutions built on Salesforce.com, so they can connect with each of their constituents from one single place and better achieve their mission.

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