

# Non-Profits Standardize Processes with Unified Solution

## Business Overview

Northern Rivers Family of Services (Northern Rivers) is responsible for the care and support of more than 14,000 children and adults in 36 New York counties. Looking to leverage efficiencies to bridge the gap between the increasing demand for assistance and declining resources in its community, it merged two-centuries-old human services organizations under one parent company in 2012.

“Our strategy wasn’t just to go out and buy something; we wanted to drive changes in our policies and culture. We needed a solution that could reflect the nuances of that shift.”

– Sharon Valiquette, Chief Officer of Business Development at Northern Rivers

## Challenges

With 80 programs staffed by 1,400 workers, Northern Rivers’ organizational complexity offered a logistical challenge. The program directors of the previously distinct entities each used a different methodology to execute and file their contracts and other important documentation. Oversight from central services departments was limited. Excel spreadsheets and correspondence through email and interoffice mail served as the primary means for tracking and delivery. In addition, Northern Rivers’ employees represented a user community with varying degrees of experience with cloud-based systems – what might seem straightforward to one could seem more cumbersome or foreign to another.

In 2017, Northern Rivers was granted readiness funds to upgrade infrastructure, including a contract management system that could extend to grants, vendors, and other critical processes. Even with the funds secured, it still faced the challenge of implementing a



## Industry

- Non-profit

## Challenges

- Drive changes in policy and culture through streamlined contract, grant, and vendor management
- Distinct agencies transitioning to one process, requiring customization for each division and user
- Limited resources, funds, and personnel for implementation and ongoing system maintenance

## Agiloft Solution Benefits

- Captures nuances of each agency’s workflows, permissions, and approvals
- Implementation completed at 50% of budgeted amount
- Convenient and comprehensive administrator training, expediting self-management for system changes and oversight

solution with limited resources. Northern Rivers' Chief Officer of Business Development, Sharon Valiquette, explains, "Non-profits tend to be staffed lean in business infrastructure. We don't have the opportunity to dedicate personnel to an agencywide system launch based on the profits we've made."

## The Search

A cross-departmental group at Northern Rivers conducted a rigorous search for the best system – narrowing the list to seven potential vendors and then down to three demos. Sharon talks about their selection process: "Our strategy wasn't just to go out and buy something; we wanted to change the culture and our policies. We needed a solution that could reflect the nuances of that shift. And we wanted to be sure that we were making the right choice, that the investment was justifiable." In the end, the cross-departmental team agreed that the right choice was Agiloft.

## The Project

To complement the "agency-within-an-agency" framework, the organization needed an application that was technically robust. It was paramount that every group felt that the new process offered the utmost transparency and accessibility. At the same time, the sensitive nature of the documentation across the programs required strong access controls. Agiloft Implementer Jack Wicks describes how these two requirements were satisfied in Agiloft, "With the corporate structure of three companies within a parent company, a user's division and program roles determines their access within the system. Certain contract creators and managers can see everything in their division, while another user can just see those within their program.

The approvals also require a higher degree of sophistication. Any time a contract enters the system, it has different approvers based on a number of factors, all automatically determined in Agiloft. For example, if a contract requires xyz approvers, x and y may sometimes be the same person, so the Agiloft system recognizes that just one reminder is required for x and y."

In addition to layered permissions and intelligent approvals for contracts, Northern Rivers has configured the solution to support its grant application process, supporting its state and federal bids. There is also work underway to expand the application to project and vendor management.

"People can go into the portal and quickly get what they need. It's been exciting to see staff embrace the system and provide feedback to further tailor it to our unique process needs."

– Kelly Busch, Director of Strategic Business Services at Northern Rivers

## Solution Benefits

One of the many Agiloft benefits that Northern Rivers embraced was the included administrator training. Northern Rivers' Director of Strategic Business Services, Kelly Busch, participated in the training and came away with a strong understanding of the system's functionality. She was able to set up a number of the complex workflows directly – applying her internal expertise in the graphical interface for administrators. Sharon also plans to take the training, "It's an intuitive system and I've found it easy to learn. I intend to take the administrator training so that we can have a back-up bench and continue to manage the system ourselves," she says.

Both Sharon and Kelly noted that users with varying levels of tech-savviness quickly adapted to the new system and process. Kelly shares, "I personally knew what the system was going to do and was pleased to see how everyone jumped right in to learn and help drive the implementation forward. People can go into the portal and quickly get what they need. It's been



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What Agiloft has done for Northern Rivers, it can do for you. Let us show you how. In a few hours, we can set up a custom proof of concept featuring your toughest business process. Give us a call to schedule a time.

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## About Agiloft, Inc.

As the global leader in contract and commerce lifecycle management (CCLM) software, Agiloft is trusted to provide significant savings in purchasing, enable more efficient legal operations, and accelerate sales cycles, all while drastically lowering compliance risk. Founded in 1991, Agiloft's adaptable no-code platform ensures rapid deployment and a fully extensible system. Using contracts as the core system of commercial record, Agiloft's CCLM software leverages AI to improve contract management for legal departments, procurement, and sales operations. Visit [www.agiloft.com](http://www.agiloft.com) for more.

really great to have staff embrace the system and contribute their thoughts on how we can make it work best for their needs.”

The team realized a notable but not immediately apparent benefit of the system with Kelly's rapid mastery of the administrator role. She was able to participate significantly in the implementation while managing her other responsibilities. This and other factors resulted in Northern Rivers' Agiloft system coming in at only 50% of the budgeted amount, allowing it to apply the remaining funds to additional licenses for further system build-out, and ensuring a long and profitable relationship with Agiloft.