

VANCITY

STREAMLINING GRANT ALLOCATIONS

WHO

Vancity, Canada's largest credit union

GOALS

To shortlist promising grant applications most aligned with Vancity's objectives

HOW

Integrating a rating and social dialogue experience with the documents related to each of the grant applications

OUTCOME

20% in time-savings to identify a shortlist of grantees, grounded in focused team-member insights

It's not easy to allocate a \$400,000 grant among 50 leading organizations playing critical roles in food supply. Add to the challenge the coordination of 11 judging panelists evaluating over 105 supporting-documents. Vancity's team of food experts deployed Ethelo to streamline its 2-stage 'EnviroFund' assessment process. The platform brought structure and cohesion to a complex evaluative discussion of over 38K potential scenarios, saving around 12 hours of in-person meeting time. After a first experience in 2015, Ethelo is being used again for the same purpose in 2016.

BACKGROUND & APPROACH

SUSTAINABLE FOOD SUPPLY EVOKES STRONG PASSIONS IN MANY PEOPLE FOR SEVERAL REASONS

To demonstrate their values and support of this activity, Canada's largest credit union decided in 2015 to support more sustainable food systems in British Columbia through their enviroFund grants. These grants came from a portion of Vancity's enviroVisa profits.

After assessing a diverse set of project applications in a 2-stage process, a total of \$400,000 in grants were directed to increase local food production, production/distribution capacity and institutional food procurement.

THE NEED

Traditionally, groups of experts sit down to address complex decisions. Vancity wanted to capture the same high-quality insights of the judging panelists but with greater objectivity and efficiency.

The two-step process created a shortlist of 11 local food organizations from 50 applicants and

allocated the grants amongst them. They needed to ensure fair distribution taking into consideration budget, funds requested, merit and regional presence.

STRUCTURED BUT FLUID DIALOGUE

Vancity wanted to keep the fluidity and quality of dialogue while minimizing unproductive meeting time, analysis time and document management. Furthermore, they sought results that focused their committee's energy on expertise with the highest levels of cohesion.

The need for face-to-face contact between the 10 panelists was never in question. Louise Pochailo, Vancity's Community Investment Specialist, stated:



The platform allowed us to review, evaluate and compare a large volume of grant applications/documents between internal and external committee members in various locations.



ETHELO'S CONTRIBUTIONS

THE ETHELO PLATFORM PROVIDED STRUCTURE, SUPPORTED FLUID DIALOGUE AND FOSTERED TRANSPARENCY IN DECISION MAKING

In the first round of interactions, 50 letters of intent were assessed against three criteria;

- measurable social/environmental impact
- action orientation
- support of innovation/sector development

Vancity's team of experts evaluated each organization accordingly using Ethelo's integrated panels for rating and social commentary.

After the first stage of voting, the panel evaluated the 19 remaining candidates against a more selective set of conditions. In this second stage, however, Vancity wanted to attach further documentation. For this purpose, within each organization's assessment panel Ethelo provided links to PDF files such as budgets, project timelines, and letters of support.

CAPTURING INSIGHTS FROM REMOTE THIRD PARTIES

Vancity's local food team also wanted to incorporate the expertise of stakeholders from Metro Vancouver and the BC Food Systems Network. On the one hand, the platform's social dialogue capability



Figure 1. Integrated rating panel, for voting and social dialogue

allowed obtaining external insights, leading to a more robust analysis. On the other, it simultaneously served to keep an orderly record of the conversations.

The platform also encouraged complementary forms of dialogue. Ideas did not always come when participants needed them, as some experts (not necessarily introverted) required time to process and record their thoughts. For reasons like these, Vancity is now set to expand its use of Ethelo into their Community Grants Program.

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Ethelo proved very convenient; we could access it anywhere at any time. It also made it easier to share ideas, post questions, and be more honest in expressing comments.

Louise Pochalio, Vancity's Community Investment Specialist

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IMPLICATION & OUTCOMES

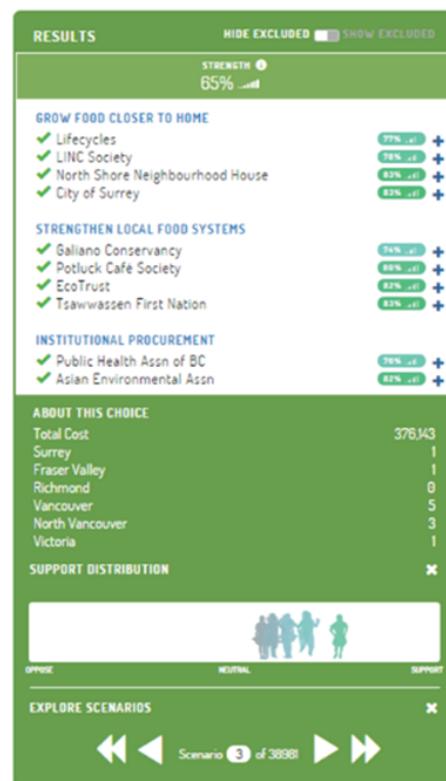
THE EVIROFUND EVALUATION ILLUSTRATES SOME OF THE CHALLENGES IN FINDING CONSENSUS DURING COMPLEX DECISIONS

There were more than 38,000 different ways that the granting committee could have distributed the \$400,000 in awards to the 19 finalist organizations. By finding scenarios that simultaneously met the criteria and accounted for the insights of many, Ethelo's platform identified the most strongly supported shortlists of local food projects.

Ethelo's ranking of shortlists not only met the budgetary and geographical criteria, but it also maximized the decision's "strength of support" (an internal metric that shows the level of support and unanimity in a team of experts choosing among multiple options).

RESULTS SUMMARY

Alongside the many comments registered within the platform, the shortlist became a key ingredient for the committee's final meeting. The judging panelists selected 90% of the platform's presented recommendations, indicating how Ethelo's harvesting of the collaborative insights of the panelists became an essential ingredient for arriving at a more robust and highly-supported solution.



Objective metrics

Actionable recommendation

Key business variables

Support profile

Every actionable scenario is assessed

ONGOING USES

For a second year in a row, Vancity's Grant Application Committee is currently using Ethelo to allocate the 2016 enviroFund grant between 70 applicant organizations in Metro Vancouver.

The platform has turned out to be the right fit for Vancity's team of experts. Ethelo's way of identifying decisive and unifying outcomes is also providing value to other parts of Vancity, such as the Youth Advisory Group which is now engaged in market research (see our case study: 'Member-driven Innovation').

Ethelo made the face to face grant decision meeting proceed quicker, saving the team approximately 15 hours of in-person meeting time.

A lot of the groundwork was completed before the grants decision meeting. This left more time for confirmation of the final decision between committee members and an opportunity to bring up anomalies and discuss budget allocations.

Louise Pochalio, Community Investment Specialist

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