

Renowned Civic and Social Organization Transformed Its Internal Processes With monday.com Work OS

Watch Our Customized Solution in Action



The Client Profile

The client is an Oakland-based statewide civic and social organization fighting to improve the lives of communities of color, immigrants, low-income, LGBTQ, and other marginalized communities. They are committed to the movement for racial and educational justice and focus primarily on youth leadership, public education, and community power.

The Challenge-Lack of an Integrated Solution to Manage Donation and Grant-Related Information

The client depends on donations and grants from external parties such as foundations for running their racial and educational justice initiatives. In order to ensure they execute their operations smoothly, they need to track prospective and awarded grants, communicate and follow up with prospects and existing foundations for new grants, manage donations received through their web portal, and manage account receivables for the next 5 years, and a lot more. The data relating to all these activities were distributed across multiple spreadsheets. They needed an integrated solution that could streamline their internal processes and bring in more efficiency, accessibility and transparency.



Multiple sources of truth resulting in duplicate work and inconsistencies



Repetitive manual work due to inefficient allocation of resources



Limited visibility into data created silos across the organization



Difficulty in tracking prospective and awarded grants and donations

The Solution-Tailored monday.com Solution Integrated With Stripe and Typeform

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Damco's monday consultants analyzed the client's requirements and devised a tailored solution on monday.com comprising various boards to manage different aspects of their operations:

- Cultivation boards to track prospective funders and grant award cycle
- Grant Management Board to track the awarded grants
- An Income Board to manage accounts receivables for the coming 5 years
- A donation board to manage the upcoming donation from the prospective funders
- A donor board to manage the data for individual donations provided by each donor

The solution was also integrated with Stripe to facilitate payment processing and Typeform to ease data collection through online forms and surveys.



Value Delivered-Enhanced Collaboration, Transparency, and Optimized Workflows

- ▶ Damco's solution enabled the client to manage institutional foundations, contacts, prospect grants, accounts receivables, and donations in one place, eliminating the hassle of dealing with multiple spreadsheets.
- ▶ The solution created a single source of truth, so everyone could work with the latest information and steer clear of data inaccuracies.
- ▶ Collaboration is easier than ever; team members can now get a holistic view of all critical activities and update the records to manage the entire workflow.
- ▶ Automation of several manual processes has enabled the client to cut down on repetitive work and secure grants and donations in far less time.



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About Damco

Damco Solutions is a trusted software and IT partner for businesses from different industry verticals spanning across the world. As a reliable monday.com partner, We help teams realize their full potential by building bespoke monday.com solutions, leading to optimized workforce, workflows, and processes. We have empowered businesses ranging from Startups to Fortune 2000 clients with its tech-integrated solutions.

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