



Case study

Apsynergy supports Secours Catholique in the transition to Salesforce Outbound Funds to Manage Global portfolio of Grants

With Apsynergy, a Salesforce partner, Secours Catholique Caritas France switches to the Salesforce solution called Outbound Funds for the management of their portfolio of international grants.



Who is Apsynergy?

Apsynergy supports NGOs, foundations and social enterprises through the implementation of *Salesforce* solutions. With extensive expertise in enterprise IT solutions, Apsynergy designs and implements solutions to help impactful organizations achieve their goals.

apsynergy.com



Who is Secours Catholique Caritas France?

Secours Catholique Caritas France is a leading humanitarian organization dedicated to supporting vulnerable populations, advocating for social justice, and fostering sustainable development worldwide.

As a member of the global Caritas International network, Secours Catholique collaborates with numerous local partners to implement projects that address poverty, inequality, and social exclusion. Their mission encompasses emergency relief, social support, and advocacy for systemic change, impacting communities across France and internationally.

secours-catholique.org

Salesforce Grants Management: Transforming Project Portfolio Management

For NGOs, foundations, and other mission-driven organizations, Salesforce has a suite of solutions (Non Profit Cloud Grant Making, Grants Management, Outbound Funds) for managing a global portfolio of projects and funding local partnerships.

By replacing legacy systems with Salesforce, organizations can achieve better data integration, real-time insights, and seamless collaboration, all of which are essential for tracking and maximizing the impact of their work. Most importantly, managing Donations (income) and Grants (spend) on the same technological platform allows NGOs and Foundations to reap the benefits of data analytics to identify where money is spent — which projects for what kind of impact.



Challenges

Unifying Donations, Marketing, and Grant Management on a Single Platform

Before implementing the new Salesforce-based solution, *Secours Catholique* was faced with the issue of maintaining a specific, custom legacy solution meaning monitoring technological advances, software version updates and available human expertise. As the fundraising part had already been switched over to Salesforce, it made most sense to also manage Grants, the monitoring of projects and international partners on Salesforce.

Delivering a Seamless Transition and Ensuring Rapid Adoption

Migrating users to a new platform, especially one central to day-to-day operations, requires careful planning. For *Secours Catholique*, ensuring a smooth transition to the Tobforce Salesforce solution meant achieving high user adoption and minimizing disruption for teams managing a vast range of grants and projects.



Solution

Deploying Salesforce Outbound Funds with Custom Data Model to Manage Grants

Apsynergy leveraged Salesforce's Grants Management and Outbound Funds modules to design a solution tailored to Secours Catholique's specific needs. The core of this solution was a custom data model that integrated seamlessly into the existing Nonprofit Success Pack (NPSP).



Key elements of the solution included:



Approval Processes and contract template

Approval processes based on customizable thresholds have been set up to ensure decision-making at the right level and complying with Governance. Thanks to the Conga tool, contract and project sheet templates are available to the users, which must then be completed and finalized.



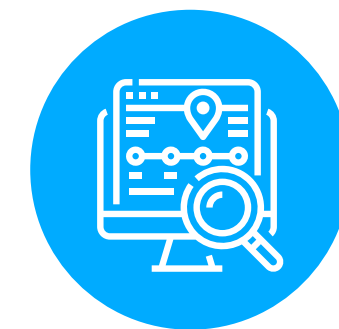
Robust Reporting and Impact Measurement

The model included fields and calculations for tracking project outcomes and budget utilization, allowing Secours Catholique to assess impact and make data-driven adjustments.



Project and Partner Management

Using custom objects and relationships, the solution enabled Secours Catholique to track the lifecycle of each project and its associated partner NGOs. This model allowed for real-time tracking of partner progress, project milestones, and fund disbursements.



Funding Request Tracking

The data model organizes grant and funding details, ensuring that all project-related data and fund allocations were centrally stored and easily accessible. This helped the team manage compliance requirements and ensure transparency.



Intuitive Flow with Gridmate and Process Automation

To promote user adoption, the model incorporated Gridmate for an intuitive, grid-based user interface, which allowed staff to interact with complex data sets effortlessly. Automated workflows linked to these objects facilitated smooth handoffs between teams, accelerating decision-making and reducing administrative bottlenecks.

Benefits

Seamless Data Migration from Legacy Systems

All relevant data from Tobflow was successfully migrated to the new Salesforce environment, enabling Secours Catholique to maintain continuity in operations without losing historical information. This transition ensured that Secours Catholique's staff could continue supporting their partners with minimal downtime.

Enhanced System for Current and Future Needs

The new solution not only addresses Secours Catholique's immediate needs but is designed to evolve as required. With Apsynergy's customizations, the Salesforce platform is positioned to accommodate new functionalities and adjustments as Secours Catholique's mission and processes develop over time.

Conclusion

The Tobforce Salesforce Grants Management platform designed and implemented by *Apsynergy* has enabled Secours Catholique to manage its grants more effectively, improve transparency, and enhance its impact.

By consolidating donations, campaigns, and project portfolios into a single, scalable solution, *Apsynergy* has helped *Secours Catholique* achieve a smoother, more efficient process for supporting communities in need worldwide. This case study exemplifies how digital transformation tailored to an organization's unique needs can deliver long-lasting benefits for NGOs managing complex, mission-driven portfolios.



How Can Apsynergy help your NGO?

Please reach out to us for a free assessment of the situation of your Grant Making Operations and how Apsynergy can deliver Value by partnering with your organization.

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