

## CASE STUDY 10

# COMMUNITY FOUNDATION (VIRGINIA)

Bringing clarity, confidence, and credibility to a small but mighty foundation.



## ORGANIZATION OVERVIEW



**Type:** Small Community Foundation



**Location:** Virginia



**Size:** Funding 35+ community programs annually



**Mission:** Strengthen local nonprofits through grantmaking, capacity building, and philanthropy

## THE CHALLENGE

The foundation assumed they were “too small” for BI tools.

### They struggled with:

- Tracking grant outcomes across organizations
- Disconnected reports

- Limited ability to compare program performance
- Difficulty communicating impact to donors
- Manual reporting that drained staff time

They needed something simple but credible.

## GOALS & DESIRED OUTCOMES

### They wanted to:

- Track grantee outcomes consistently
- Improve transparency for donors
- Build dashboards for internal use and board review
- Strengthen impact storytelling
- Modernize their grantmaking process

## SANDAI'S APPROACH

SaND AI built a small but scalable solution:

- A Grant Impact Dashboard summarizing outcomes per program
- A standardized reporting template all grantees could use
- Cleaned, organized outcome data across years
- Training for staff on data storytelling and donor communications

## THE SOLUTION DELIVERED

- A grant portfolio dashboard
- Easy data upload tools for grantees
- Automated donor-ready impact summaries
- Real-time insights into program strengths and gaps

## THE RESULTS



Stronger donor confidence due to transparent reporting



Faster grant reviews and decision-making



Easy comparison across programs and years



Improved accuracy in reporting



Staff time freed for capacity-building work

## IMPACT ON MISSION

With clearer data, the foundation can better support grantees, target resources effectively, and tell a compelling story of community impact.

## WHY THEY CHOSE SANDAI

They wanted a no-jargon, capacity-friendly partner who could build BI tools without overwhelming a small staff.

## WHAT'S NEXT

SaND AI is integrating Agentic AI to help automate donor updates and quarterly portfolio summaries.



## CLIENT TESTIMONIAL



*We didn't think we were 'big enough' for data tools like this. SaND AI proved us wrong. Our new BI system is simple, affordable, and gives us everything we need to tell our story with confidence.*

— Executive Director