



### Benefits

- Much greater level of proposal and conference management efficiency
- Fast and secure document retrieval
- Internal/external editing capabilities with full version control
- Every step in the process is tracked
- Workflow reminders and escalations when appropriate
- No additional servers or administration issues
- Fast and easy implementation

**"SpringCM allows me to manage business processes without worrying about technology. I can do many things with a small staff that I could not accomplish previously."**

— Jim Cote, Director of IS

## Liberty Fund, Inc.

Liberty Fund, Inc. is an Indianapolis-based private educational foundation established to encourage

the study of the ideal of a society of free and responsible individuals. The Foundation develops, supervises, and finances its own educational activities to foster thought and encourage discourse on enduring issues pertaining to liberty. Liberty Fund publishes 20 or more books each year and conducts over 165 conferences throughout the United States, Canada, Latin America, and Europe.

Each of the Liberty Fund conferences generates an enormous volume of proposals that must be managed to ensure a successful operation. Proposals can start a cycle that culminates in a new conference a year and a half later. During that time, every step in the process must be managed very carefully and must be completely traceable. This was much more difficult with the existing system, an internally developed ASP. Net application for light document and records management.

In order to achieve better and more cost-effective results, Liberty Fund decided to embark on an evaluation process for a new document management solution provider. Jim Cote, Liberty Fund Director of Information Services, led the project and evaluated several possible technology partners. Mr. Cote considered several on-premise vendors, Microsoft SharePoint, and the on-demand solution from SpringCM. According to Cote, "The high up-front costs and training requirements of the on-premises solutions were definitely a problem. We didn't want to maintain additional servers or deal with all the administration issues. The SpringCM system required no hardware or software installation and offered us worry-free maintenance, backup and disaster recovery."

Cote continued, "Microsoft SharePoint was part of our evaluation process but we found it cumbersome and hard to use. I find the workflow in SpringCM to be strong in functionality but also intuitive and easy to use. This is important because many of our users are non-technical." Cote also liked the ease of use of SpringCM's Web services and interface adaptability with other applications. This was especially important because the new system had to integrate with an existing Liberty Fund application.

Liberty Fund started by moving many of its historical documents that were contained in a SQL database into SpringCM, enabling secure storage and fast retrieval. It then created a series of workflow steps designed to allow internal and external users to edit documents, while maintaining full version control.



The process enabled by SpringCM begins with a proposal received via mail, email, or Fax. The proposal is converted to PDF, put into a specific folder and automatically routed to the vice president of education for review. Depending on the worthiness of the proposal, a record is created which starts several other workflows such as curriculum development, hotel contracts and logistics, and assignment to a program officer.

Another important aspect of the SpringCM solution is the way it enables the proposal to be packaged for board approval. All documents related to the proposal are consolidated into a single document so board members can have a cohesive yet comprehensive view with a single click. Metadata is easily added at various stages of the process, reminders and escalations are sent when appropriate people have not completed their workflow step (e.g. review or approval). Not only is the latest version always available but so is every previous version. Electronic signature functionality provides a formal record of contract and other business item approvals.

Liberty Fund's SpringCM solution currently has 15 users and will be growing to 40-45 over the coming months. Many of the users are remote, which is easily enabled by the SpringCM Web-based interface. Any authorized user can access documents and workflow from any Internet browser, at any time. Several future uses of the solution have been identified including management of W-9's and 1099's and integration with the Great Plains accounting system to manage the unstructured content related to financial transactions.

Jim Cote summarized his thoughts about the solution, "SpringCM allows me to manage business processes without worrying about technology. I can do many things with a small staff that I could not accomplish previously."

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