



## Select Equity: Building Better Grantee Relationships



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### THE FOUNDATION

The mission of the Select Equity Group Foundation is to make a positive impact by actively engaging all employees in identifying and supporting charitable organizations of excellence. The foundation supports a wide variety of charitable programs. To date, more than \$17 million in grants have been awarded to local, national and international not-for-profit organizations in the areas of advocacy and civil rights, arts and culture, education and youth development, environmental causes, health, human services and international development.

### A BETTER WAY

In 2007, after being at Select Equity for several years, Rob Wilson was given the opportunity to oversee the foundation and all charitable activities as executive director. He was excited to take on his new role, but he found that the process to get things done was not so simple. He recalled, "In 2007 I was spending a good part of my day trying to find historical information by endlessly sifting through old emails, looking at endless spreadsheets and scrounging for old pdfs and paper documents. It took me days to get the data I needed. I knew there had to be a better way."

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## THE SEARCH

He began searching for a grants management solution but didn't have much luck. "None of the software companies I found could really do the job I wanted them to do. They were too big, too expensive and they would be too taxing on our internal team in terms of getting things implemented. Because we are a corporate foundation, I didn't want to involve our internal resources unless I had to."

Because of these hurdles, Wilson decided not to make a move right away.

Fluxx first came to Wilson's attention in 2012. "The first thing that I noticed was the attractive look and feel. It really appealed to me. It didn't seem like a giant behemoth of a system and it looked like a fun space to work in. It felt less corporate," he said. Wilson signed up to be a Fluxx customer days later.

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– Robert Wilson

## STRENGTHENING THE GRANTEE RELATIONSHIP

Since 2012, Fluxx has helped Select Equity not only internally, but also on the grantee-facing side as well. "It's true that Fluxx has made day to day workflow incredibly efficient. I can pull up historical data with a few taps of a keyboard. I can find any information I need. But perhaps more importantly," Wilson added, "Fluxx helps strengthen our client and partner relationships. It makes it easy for clients to engage with us. When clients interact with Select Equity they look forward to it. It's an easy process and they compliment us all the time."

Robert Wilson is the executive director of the Select Equity Group Foundation. He has led the foundation and all Select Equity charitable activities since 2007.



Founded in 2010, Fluxx is a San Francisco-based technology company focused on innovation within the grants management ecosystem. Armed with the support and collaboration of many large grantmakers, Fluxx has re-invented the new standard for grants management – empowering both grantmakers and grantseekers to rise above the time consuming day-to-day tasks and focus on their core missions. Fluxx is venture backed by leaders in both Silicon Valley and the Foundation world, Felicis Ventures and the Kresge Foundation, and count hundreds of the leading foundations as customers. To learn more, visit [www.fluxx.io](http://www.fluxx.io).