

Client Story

Lyle S. Hallman Foundation

Reaching new heights of efficiency and insight with GIFTS Alta: The Lyle S. Hallman Foundation streamlines its entire grantmaking process



LYLE S. HALLMAN
FOUNDATION

In 2003, longtime philanthropist Lyle S. Hallman founded the Lyle S. Hallman Foundation to serve the Region of Waterloo in Ontario, Canada. Dedicated to supporting education, health and children's initiatives, the foundation receives around 200 grant applications, and awards approximately \$2 million in local grants, each year. The foundation is run by just two individuals: Laura Manning, Executive Director, and Garry Haack, Grants and Administration Officer.

With a team of two, the Hallman Foundation's success hinges on its ability to be highly efficient, and to ensure Laura and Garry have maximum insight into the effectiveness of its programs. GIFTS Alta has helped it accomplish both of those objectives by greatly reducing the time involved in routine administrative tasks, providing incredible insight into the impact of its giving, and streamlining every aspect of its grantmaking process, from start to finish. "GIFTS Alta is one of the main reasons why we only need two employees," says Garry. The insight and efficiencies provided by GIFTS Alta have left such an impression on the Hallman Foundation that the system is fast becoming central to many of its internal

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processes. The foundation is now developing internal workflows that work around GIFTS Alta, to maximize those insights and efficiencies.

Powerful Tools Bring Outstanding Efficiency

As half of the Hallman Foundation's staff, Garry has a great amount of responsibility. He manages intake of grant applications, organizes all foundation scheduling, coordinates and monitors grantee progress reports, oversees award distribution, and prepares reporting information for the foundation's board of trustees. He even makes the coffee in the morning. With so much to do in one day, Garry needs powerful tools to help him move quickly and efficiently from one task to the next.

Garry was immediately interested in GIFTS Alta after hearing about the efficiencies it promised. "We have always embraced technology to help us deliver our programs with minimal administrative costs," he says. "GIFTS Alta has given us the ability to be more focused on our grantmaking with minimal attention to repetitive tasks."

Key Information Right When it's Needed

To truly be efficient and proactive in his job, Garry needs to know the status of his foundation's awards in a moment's notice. Fortunately, GIFTS Alta compiles extensive amounts of data into an array of easy-to-read charts, graphs, and tables, giving him instant access to the information he needs right when he needs it. "First thing in the morning, I get a quick overview of what's going on," he says. "At a quick glance I can see where we are and I know right then if there is anything that



requires my immediate attention.” GIFTS Alta allows Garry to start each day armed with the insight he needs to ensure that his organization’s grants are making a meaningful impact in his community.

Remarkable Insight with Minimal Effort

As the workday progresses, customized dashboards allow Garry to quickly and easily analyze his organization’s giving at a glance. “I love the dashboards,” he declares. “I was totally awestruck by how much information is on one page!” Plus, powerful reporting capabilities save Garry time he previously spent digging for data. He can now drill down into electronic reports to instantly access the data being reported upon. “The drilling down feature really refines the related information. When I’m in a report it automatically shows me the related payment, so I don’t have to go looking for the payment to approve it. The information is all right there.”

Unparalleled Ease of Use

With such a small staff there was no time for Garry to spend weeks learning how to use GIFTS Alta—he had to work with his new system immediately. Luckily, GIFTS Alta was intuitive and easy-to-use right from the start. “It’s much easier for someone to come up to speed quickly with GIFTS Alta,” he says. “We just sort of jumped in with both feet and that was not a problem. We recently went through a reporting process and issued a number of grant checks, and it was certainly easier to do even though we’ve only been using GIFTS Alta for a month. There is definitely a reduced learning curve for new users.”

GIFTS Alta Will Guide the Way

With such a powerful tool as GIFTS Alta, organizations will find themselves reconsidering the effectiveness of processes they have used for years. Ultimately, Garry expects GIFTS Alta to transform the entire grantmaking process for the Hallman Foundation. “We’re going to take a long look at our workflow and we’ll be changing things to work around GIFTS Alta. There are definitely things that we can improve upon now that we have the system in place.”

Making the Transition to GIFTS Alta

Of course, many organizations might be hesitant to move to GIFTS Alta, especially those that have been using the same solution for years and have grown comfortable with it. However, moving out of one’s comfort zone often brings significant rewards. “Many people will be apprehensive about moving to GIFTS Alta. I was too,” says Garry. “But there’s absolutely no need for concern. It takes very little preparation and it’s easy to use. I’ve also been totally impressed with the MicroEdge support staff; they are great. I would recommend GIFTS Alta to any foundation, big or small.”

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