



CLIENT STORY

THE DALLAS FOUNDATION

Foundation Type: Community Foundation



Background

The Dallas Foundation, the oldest community foundation in Texas, was created in 1929 by a group of civic leaders who had spent several years researching the growing national trend to create community foundations. For 60 years after its inception, the foundation ran on the help and dedication of unpaid volunteers. In 1987 the Dallas Foundation Board of Directors hired its first paid staff person. Mary Jalonick has been the foundation's Executive Director ever since. When Mary joined the foundation, it had assets of \$14 million, and one donor advised fund. At the end of September 2004, the Dallas Foundation had nearly 200 funds, including more than 100 donor advised funds.

In late 2001, Mary Jalonick and Bill Solomon, the foundation's Chief Financial Officer, went to their Board of Directors with several pressing technology needs. One of their priorities was to offer the foundation's donors and fund advisors a new service; online access to their donor advised funds. The Dallas Foundation staff wanted their donors to be able to securely review fund balances and fund activity, and submit grant recommendations online.

Bill left that board meeting authorized to purchase and implement integrated technology solutions from MicroEdge, including their flagship product, Foundation Information Management System (FIMS™). In addition, the Dallas Foundation implemented DonorCentral™ enabling them to offer their fund advisors and donors instant online access to their funds from any computer with an Internet connection.

Providing a Critical Service

Today, Mary Jalonick says, "Online DonorCentral services are an essential piece of our donor services. Our donors expect it. It's no longer just a luxury." The foundation's DonorCentral Web site has had over 270 visits this year, and over \$1 million in grant recommendations have been submitted online.

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One of the donors using the site regularly is Mary Garcia, Operations Manager at Dallas Social Venture Partners (DSVP). DSVP was launched in March 2000 as a donor-advised fund of the Dallas Foundation. Its mission is to address root causes of community problems through a new model of giving - Venture Philanthropy - based on the venture capital model. DSVP was incubated in part by the Dallas Foundation, which provided office space and a staff person's first year salary. Today, DSVP has its own offices, and a staff of two.

Mary Garcia uses DonorCentral to manage DSVP's grants management cycle. Each year the nonprofits they fund submit proposals for the current year's funding and decisions are made to fund new agencies. Once the funding agreements are complete, DSVP staff log in to DonorCentral to enter the new grants and any associated contingencies. They can even enter payment schedules, allowing them to log in any time to see what commitments have been made, who has been paid and when. Once a non-profit working with the DSVP fulfills all requirements, the Dallas Foundation is notified that a payment can be made.

Mary Garcia says, "The whole thing is totally self-guided. I probably had two questions on how to use it! It's so easy! And it saves the Dallas Foundation time too, by making communication easier."



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An important tool for Donor Relations

Bill Solomon says that DonorCentral is an important part of the foundation's overall donor relations. He knows that donors and advisors really appreciate being able to check their fund balances online, particularly when they are getting ready to make a grant recommendation. "People expect fund information from their financial institutions. If we can provide that information online to our donors, it makes us look more professional. We look like someone they can trust."

He adds that allowing donors to make online grant recommendations saves the foundation time because they don't have to manually enter the grant data into FIMS. Instead, it is reviewed by foundation staff and then imported directly into the database. The donors even get an acknowledgement from the foundation right after they submit the recommendation.

The Dallas Foundation makes many payments from some funds, and Bill says, "We used to get lots of phone calls saying, 'Have you paid so and so?'" Now we can put all our transactional detail online, so we get many fewer phone calls." In addition, the foundation recently began to let donors register online for access to DonorCentral, which has further reduced the number of phone calls their office receives.

For the Dallas Foundation, enhancing the services the foundation can provide donors is a top priority. DonorCentral from MicroEdge is one way in which the foundation is continuing to work to provide the best possible service to its donors.

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