



CLIENT STORY

WILLIAM PENN FOUNDATION

PROFILE

Type: Private Foundation

Users: 21

System: GIFTS Client/Server

Modules: MyGIFTS, IGAM, Document Mgr, Customizer



Powerful Internet Tools Connect Board Members More Closely to the Foundation

Barbara Scace is one of those people who makes things happen. With an inquisitive nature, thorough knowledge of the grants management process, and a deep understanding of how people work, she continually contemplates how to make things better – always bringing quality and function to a higher level. In her role as the Director of Information Systems and Grants at the William Penn Foundation, a dynamic foundation with over \$60 million dollars in grants awarded annually, she regularly deals with change.

And while the Foundation's mission to improve quality of life in the Philadelphia region often inspires change, there's one thing that has remained constant for Barbara, and that's a solid grants management system. For the past eight years, they have successfully used a combination of effective tools to set their organization apart as a leader in best practices.

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A Connected Community

About two years ago, Barbara started wondering how to educate people on the important work that the Foundation was doing. A regular Web surfer, Barbara immediately saw the potential of using the Internet. "Because we realize the power and potential of our software, every time our needs change or we look at our workflow processes, we keep asking how our GIFTS™ Grants Management System can help," states Barbara.

And so this was the origin of the William Penn Foundation's Web initiative. The first stage improved the searching and reporting tools available on the Foundation's public Web site. Visitors can perform searches on the status of grants awarded over a three-year period, using several different criteria fields. These fields are based on the actual code table structure the Foundation uses in its GIFTS database; thus allowing searches to be customized – as broad or as narrow as the visitor wants. It also presents the information in a more current and "real-time" fashion. It was a natural progression to bring this same level of convenience to their board members. "The whole idea of this undertaking is to promote self-sufficiency and the convenience to access information when you need it," says Barbara. But the real results of this venture are demonstrated by the significant improvements in the flow of information and communications, allowing the Foundation to stay "in touch" with the community and its members.



Improved Board Meeting Preparations

Since board level grant decisions are made at each quarterly board meeting, preparations used to be a big undertaking. Each board member would receive a "briefing book" containing full write-ups of each proposal being considered. This would result in a very lengthy and bulky book.

Through the use of a Web-based "digital dashboard," and a shorter format design for the actual briefing books, board members now have the best of both worlds. The shorter format provides a one-page, executive summary of each proposal. The "digital dashboard" provides each board member with their own custom Web homepage with information specific to their needs — including an on-line version of the full grant proposal write-ups — each board member can decide which full write-ups they want to view or print. In addition, these custom views also include information on the board meeting agendas, speaker details, and reports that will be discussed. "Our initial concern was whether board members would use the online access. We've only been through one board meeting using this new format, and the initial feedback is positive. By providing easy access to a wealth of information and constantly promoting the idea that it's available from their desktops, we will hopefully improve the quality of our meetings," states Barbara.

Easier, Online Administration of Matching Gifts and Small Gifts Programs

Although the small gifts and matching gifts programs are benefits offered to the Foundation's board members, managing the submissions and contributions is quite a time-consuming task. To alleviate the burden on staff and on their board's time, all the information was made available online. Since the Foundation's grants management system already tracked and maintained this information, they could easily provide each board member with ready, real-time access to their individual data-request submissions, payment schedules, balance statements, etc. "Now, our board members don't have to wait to speak with me directly to get answers to simple questions. They can now access this information at their own convenience when they need it," says Barbara.

Online request forms, links to board-related policy documents and other forms, such as the expense reimbursement forms, are available directly from their homepage, enabling board members to just click and send, view, or print if needed. Additionally, the Foundation even simplifies communications through links to staff, board member, and grant team email addresses, along with key details about each contact. "We publish an annual Board of Director's Manual that provides information on the Foundation's board policies, practices, forms, and contact information. The type of information contained in this manual was the basis for much of what is included in the custom homepages for each board member. What used to be available in paper format is now available electronically and makes access to it more efficient and easier."

The Tools of Innovation

These and other innovations at the William Penn Foundation were made possible with the use of MicroEdge grants management solutions. At the center of their implementation is GIFTS, comprehensive grants management software that provides a flexible and highly adaptable multipurpose database. GIFTS' open architecture and its ability to track a wealth of information enables the Foundation to use it for so much more than just grants tracking. When used in combination with Web modules such as IGAM Internet grant application system and MyGIFTS Web-based grants management solution, the William Penn Foundation was able to simplify and improve communications with their board members, and to offer them an easier method for handling their small gifts and matching gifts submissions and access to other information. In the end, The William Penn Foundation not only created a solution for their own needs, but they also made another important contribution — further extending the lines of communication in their community.

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