

PROFILE

Type: Independent Foundation

System: GIFTS

Number of Users: 7

An Optimization Analysis from MicroEdge resolved the JEHT Foundation's reporting problems and prompted the use of GIFTS throughout the entire organization.

Background

The JEHT Foundation was established in April 2000 to support its donors' interests in human rights, social justice and community building. The name JEHT stands for the core values that underlie the Foundation's mission: Justice, Equality, Human dignity and Tolerance. The Foundation's Community Justice and International Justice programs reflect these interests and values.

The Foundation recognizes that to effect systemic and social change requires a long-term perspective. It takes knowing the issues, making a strong case, building a critical mass of support, understanding the political landscape, working collaboratively and strategically, and, at the end of the day, a measure of patience, luck and good timing. With this framework in mind, the Foundation makes a combination of multi-year and one-time grant commitments for general operating support, project support, capacity building, and special needs and opportunities as they arise in its fields of interest.

The Challenge

While the JEHT Foundation has used GIFTS since its inception, initially they used the system to track basic contact and grant information. However, as the Foundation began to further organize their funding by issues and approaches, capturing only basic information no longer served their needs.

Detailed grants and organizational data were necessary to conduct a more thorough analysis and planning. Moreover, the Foundation ran into a bit of a snag when attempting to run cash flow reports as well as creating reports with specific information for their auditor.

The Foundation's administrative director, Debra Kendall, wanted to produce a cash flow report that had some variants to it, according to how trustees wished to see information. Debra turned to Marjorie Louis, the grants administrator, to run some

reports from GIFTS in order to obtain the information she needed. But Marjorie was not able to extract this information easily. And she faced a similar problem when producing a financial report for the Foundation's auditor. In fact, for both reports she was generating several reports within GIFTS just to get one piece of information

For the auditor, they were creating one report for expenditure responsibility and one report for discretionary grants. Everything had to be separated into classifications and by scheduled date and payment date. The cash flow reports needed to show items that were approved to be paid in a particular year, but that were actually paid the following year,

such as the scheduled dates and payment dates.

While a custom report was possible, her MicroEdge representative thought she should be able to find the information using GIFTS' search capabilities, and recommended that they also consider an Optimization Analysis.

The Approach

Debra called MicroEdge to discuss whether a custom report might make it easier to retrieve this data. While a custom report was possible, her MicroEdge representative thought she should be able to find the information using GIFTS' search capabilities, and recommended that they also consider an Optimization Analysis. After evaluating their options, Debra and Marjorie concluded that it would be beneficial to have MicroEdge examine the way data had been entered to ascertain whether the current process was hindering report generation.



CLIENT STORY JEHT FOUNDATION

The JEHT Foundation scheduled an Optimization Analysis to review their system and processes with MicroEdge, to determine if additional efficiencies or improvements could be made. The Optimization Analysis is a MicroEdge service designed to help clients adjust GIFTS to better fit their workflow requirements, to learn how to use GIFTS more effectively, solve any problems they are experiencing, or simply to provide a refresher training for staff members.

"We are now using GIFTS as an organization-wide solution for the whole foundation, rather than only as a grants process tools for the program staff"

Before coming on-site to the JEHT Foundation, a MicroEdge service representative, Suzie, reviewed a copy of the JEHT Foundation's GIFTS database. Prior to the first meeting, she was able to look at how the Foundation was entering information, analyze the coding structure, and review the features that were and were not being used.

The Solution

The Optimization Analysis took place over three days. When Suzie came on-site, she had a report that documented potential inefficiencies, and a list of features that were not being used that might help the Foundation. Suzie went through her report and asked questions as to why the Foundation did things a certain way. From the answers she obtained, she could either understand the rationale or explain a flaw in the way things were operating.

During the first day, they reviewed initial impressions and gathered extensive input as to why and how the Foundation was using GIFTS. The second day provided some clarification, evaluating the feedback that had been provided and discussing the objectives of the Optimization Analysis in greater detail. On the third day, they met together with the program staff to have a demonstration of additional things that could be accomplished with GIFTS.

Resolved reporting issues

The reporting problem that initially prompted the JEHT Foundation's call to MicroEdge occurred due to the way grants data was input into GIFTS, and the coding structure that was being used. The Foundation has reorganized their

coding structure, adding more codes to cover various request types and status. The system has been further defined to show all the detailed steps of a grant instead of just broad ranges. This way, Foundation staff can tell what stage a grant is in directly from within GIFTS, and whether it is waiting on anything. Additionally, with their enhanced system, at a glance the Foundation can easily see how many organizations have submitted proposals, how many have been rejected, and how many have been funded.

Expanded use to entire organization

Another change to their process is reflected in the way the JEHT Foundation is currently using GIFTS. Before, only Marjorie handled the data entry. Now as a result of the optimization analysis, all program staff participates in the use of GIFTS. They enter every piece of information they are involved with into the system, putting in all the little steps themselves, such as activities tracking, due dates and more. "We are now using GIFTS as an organization-wide solution for the whole foundation, rather than only as a grants process tools for the program staff," states Marjorie. "Since our program managers often are on the run and can't always be tracked down, GIFTS enables us to access all the information we need, regardless of whether they're in the office or on the road."

"Once you've started using GIFTS, it's a good idea to step back and utilize this service, to see whether the system is being used to its fullest potential"

Future Plans

Once the JEHT Foundation has implemented all of the suggested changes to their current process, they plan to go back and adjust past data records, to afford a better historical view. Then they'll look ahead to the future. "Once you've started using GIFTS, it's a good idea to step back and utilize this service, to see whether the system is being used to its fullest potential," concludes Marjorie.

For more information on MicroEdge's Solutions contact:
Phone: 800.899.0890 x250
Email: gifts@microedge.com