



CLIENT STORY

Calgary Foundation

Helping Donors Meet their Philanthropic Goals The Calgary Foundation Chooses a MicroEdge Technology that Speaks their Language

Supporting Donors' Goals

Every day, Craig March has 265 million reasons to go to work. As Information Systems Manager and Controller for The Calgary Foundation, Craig is responsible for the systems, processes and policies that ensure efficient management of the foundation's \$265 million endowment fund. The extraordinary level of accountability required in such a community foundation mandates that Craig and his team be constantly vigilant for ways to improve system efficiency, while maintaining a secure and productive work environment.

The Calgary foundation was formed in 1955, and funded some 515 registered charitable organizations in the greater Calgary area last year. The foundation serves as a bridge between donors and the broader community by assisting donors in meeting their charitable goals. "Our job," says Craig, "is to ensure that the systems that support the staff also serve to support the community, and the donors that work to make Calgary such a great place."

In 2004, Craig began a review of the organization's technology structure. He concluded that to keep pace with the changing face of the community foundation industry, and the special needs of The Calgary Foundation, he would need to simplify and strengthen his existing system architecture. The foundation had been using a system comprised of disparate software programs and utilizing multiple databases. This system was meant to store and retrieve data, manage fund activity, manage foundation administration and manage grant activity. The complexity of multiple and unique databases and problems with data input and extraction, data sharing with donors and related issues made workflow difficult and less efficient than his new system goals.

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-Craig March,
Information Systems Manager
and Controller

Forward and Backward Software

The Calgary Foundation prides itself on the way it executes one of the fundamental strengths of community foundations, as described on its Web site: "Community foundations are uniquely equipped to help donors meet their particular philanthropic goals by providing in-depth knowledge of community opportunities along with expertise in a wide range of flexible charitable giving options." This unique aspect of flexibility within the foundation was also one of Craig March's stumbling blocks. Calgary's software system no longer accurately mirrored the business processes of an expanding community foundation. Craig says, "With our previous system, if a gift of \$100.00 were received, for example, the fund would be assigned,

posted to the general ledger and that's it. If later, the donor were to change their mind and want a different fund - there would be no way to do that in the software. Once the funds were assigned it was difficult to reverse that data and re-assign it somewhere else." Craig calls this system requirement, "forward and backward software" - or software that allows the foundation to respond quickly to changes, maneuver and extract information and get that information to the donors.

New Software Selection

The Calgary Foundation was seeking a system designed from the ground up to accommodate processes unique to community foundations. The system needed to be fully integrated. It needed to quickly and easily perform fund-level accounting processes, while optimizing spending rate calculations. Craig wanted online contact management, and was looking for methods to improve investment pool management as well.

Craig and his team reviewed the attributes of FIMS, the foundation information management software from MicroEdge, Inc. "So many of the larger foundations were already using FIMS," he said, and "after contacting fellow Canadian foundations it made sense to move to the integrated FIMS software solution."

"FIMS speaks our language," explains Craig. "It's so much more comfortable to use because it's built for the core business of our foundation which is always; better communication with donors, more information available to donors and better stewardship of donors philanthropic objectives."

The lack of fully integrated communication was the main driver for the change, but ultimately, Craig felt that from the perspective of donor service, system architecture and ease of use - the decision to select FIMS was obvious. According to Craig, under the old system, staff frustration was high, because only about half of the previous multiple software system was fully understood, resulting in underutilization and "workarounds" that actually increased workload. "FIMS has reduced our frustration and increased our efficiency," says Craig, "what's not to like about that?"

Grants Management vs. Full Integration

Serving both grant makers and foundations for over 20 years, MicroEdge understands the different needs of giving organizations. Grants management software alone does not directly support fund management or investment management. Community foundations have traditionally had little choice but to rely on disparate software programs to work together to help address donor needs.

According to MicroEdge President George Macintyre, "In today's complex and highly specialized giving environments, community foundations trying to utilize a multiple interface and database approach will find it may not create an efficient solution, and it can generate unanticipated difficulties in control and management. Our FIMS product was specifically designed to provide a completely integrated solution - saving the organization time and reducing costs. Complete integration is what makes a community foundation successful."

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Service. Service. Service.

The decision for The Calgary Foundation to invest in new software was easily justified. Craig quantified the HR costs associated with underutilization of the old software, and the time toll of workarounds. It was easy to see that investment in FIMS would benefit the foundation, and ultimately the community it served.

The Calgary Foundation staff was able to make positive changes for their constituents within the first year of implementing FIMS. FIMS makes information accessibility much easier, and when considering bottom-line usage - inputting and extracting data - Calgary staff found that FIMS suited almost all of their goals for their donors and community. "Our goals are

simple; service, service, service," explains Craig. "I hope donors see the speed at which we can now respond to queries."

FIMS single relational database allows The Calgary Foundation staff to easily and automatically update a donor's activities or fund changes because the software thinks backward and forward, not just forward. Plus, by switching to an integrated software solution, the aggravation, duplication and anxiety of training on three different software applications was eliminated.

"Our mission is to better support our community and support ways we feel are best to do that by raising, investing and granting dollars that support areas of the community in which donors can make the most impact," Craig sums up. "We also want to make our area the best place there is to live. In order to accomplish all of that, we have to deliver information better to our donors and steward our donors philanthropic desires. We know the next step to achieving that is DonorCentral and MicroEdge Portico GRM, and we're looking forward to making that move in the near future."

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