



CLIENT STORY

California Wellness Foundation

GIFTS is Good Medicine for The California Wellness Foundation

Founded in 1992, The California Wellness Foundation (TCWF) is one of the state's largest private health foundations. TCWF makes an average of \$40 million in grants each year in pursuit of its mission to improve the health of the people of California through grants for health promotion, wellness education and disease prevention. A clear-cut mission with a complex set of obstacles behind it — managing over a billion dollars in assets and keeping 52 staff people trained and up-to-date on the status of grants requested from all around California. Fortunately, one of the answers to TCWF's grants management challenges was as clear-cut as its mission — GIFTS.

Because they are a statewide organization, TCWF receives grant applications from all over California. That translates into an enormous volume of correspondence each year that needs to be sent to clinics and other nonprofits applying for grants, requesting additional information or declining the requests. Tasks that once took Program Assistants hours are now done at the push of a button using GIFTS mergeable e-mail and letter templates. "It's impossible for me to count the number of hours GIFTS saves us," says Joan Hurley, TCWF's Director of Grants Administration. "It's a tremendous timesaver."

Kay Dawson, TCWF's Grant's Program Specialist and GIFTS database administrator, agrees. "All grant-related information that is published quarterly to our Board is generated from GIFTS. All monitoring with regard to meeting Foundation goals and core values comes from data kept in the database," she says. Payment records for over \$40,000,000 in grants last year were all tracked and easily reported on. "My personal motto here at TCWF is 'If we capture it in GIFTS, I can report on it for you, and you can have it your way.'"

"It's impossible for me to count the number of hours GIFTS saves us," says Joan Hurley, TCWF's Director of Grants Administration.

- Joan Hurley, TCWF's Director of Grants Administration

The Document Manager module also enables them to track every request that comes in using an electronic filing system, moving them toward a more paper-free office. An important function of GIFTS to TCWF and the "beauty of it," as Hurley says, is its use as a tool to log and archive literally everything related to a request that comes in the door from day one. "Grant information is quickly accessible without going to the banks of files. Monitoring is efficient and easily accomplished. I cannot imagine the workload for program assistants without GIFTS automation of information," says Dawson.

Beyond providing easy access for staff and an organized electronic filing system, GIFTS acts as a project management tool, giving information from who is managing what projects to how various program areas are working. "It is a reviewing tool for productivity data," Hurley says of the ease of adequately keeping track of and reporting on large amounts of critical data.

GIFTS provides "a snapshot of any of our grants at any point in time"

TCWF also uses GIFTS as a one-stop shop for keeping track of their financial data and their coding systems, which help them monitor, not just grants, but also geographic distribution of their grants, which is important to a statewide funder like TCWF. GIFTS is "a robust data tool, an amazingly powerful tool," Hurley says.



(continued)
California Wellness Foundation

"We give away about \$40 million each year and there is a LOT of work GIFTS helps us do." So much, in fact, that TCWF evaluates the Program Assistants each year on their proficiency with GIFTS. Why? The better GIFTS is utilized, the higher the productivity. "The more efficiently we can do our work, the better we can become at effectively funding grantees, and that is what's most important to our Foundation."

For more information on The California Wellness Foundation visit:
www.tcdf.org.

"All grant-related information that is published quarterly to our Board is generated from GIFTS."

For additional information contact:
Phone: 800.899.0890 x305
Email: solutions@microedge.com

