

PROFILE

Type: Family Foundation

System: GIFTS - Access Version

Modules: MyGIFTS, Budget, Customizer, Document Manager

Background

The Jay and Rose Phillips Family Foundation, founded in 1944, focuses on supporting programs that address unmet human and social needs, helping families become self sufficient. The past few years the majority of their grantmaking has been addressing the needs of the communities of the Minneapolis/St. Paul metropolitan area, with the remainder being the discretionary grants of the trustees. Not only do they need a software solution that can facilitate keeping track of this grantmaking, they need one that can help make year-end reviews simple and easy. MyGIFTS, one of a series of modules that web-enables the GIFTS database, is that solution.

Finding the right tool for the right job

Sari Buri, the Phillips Foundation's Grants Manager/Information Systems Manager says that MyGIFTS has paid for itself in board member and trustee satisfaction. These key players now have a better handle on the progress of their philanthropic work. They do year-end reviews, access real-time reports, and see where their grants are going, all via the Internet using MyGIFTS. MyGIFTS has become a welcome addition to the Foundation's suite of MicroEdge products.

MyGIFTS makes reviewing easy - for everybody

When Shari began using MyGIFTS, she saw an immediate, expected benefit in being able to develop a home page for specific needs, "But the unexpected benefit was that our trustees started using MyGIFTS. At the end of the year they were constantly calling, asking me how much they gave last year, the last five years, etc. It was eating up a lot of our time. So I developed a home page for our board members, and so now when they have questions, they just go in themselves and look it up."

MyGIFTS brings the day-to-day operations of the Foundation into the hands of those who usually focus on the big picture - the board members. Through MyGIFTS and its benefit of being able to access Foundation information from anywhere, via the web, board members now get the answers and the details with an ease they never had before. And that's just fine with Shari, who now focuses more on her core duties.

MyGIFTS has proven itself to be an invaluable part of the year-end review process for the board members. "They're in there constantly", Shari says about MyGIFTS, "and it's very helpful for the trustees' discretionary grantmaking."

"I can't
imagine doing
my job without
MyGIFTS"

A tale of inter-generational usability

Shari also tells of another remarkable use: the chair of their board, who is 85, called Shari to ask if she could give him access to additional queries thru MyGIFTS. "I about fell over, because not only did that mean he was tinkering with it, it meant he was actually using it. The younger trustees use it, as do secretaries of family members, but for a member of his generation to do it himself," she says, "it just blew me away."

MyGIFTS advantages:

- Reduces workload at year-end review.
- Remote Access increases productivity and ease of collaboration.
- Increases access to information across the organization.
- Web browser interface is easy to use with little or no training.