

PROFILE

Type: Independent Foundation

System: GIFTS

Number of Users: 1

Essential GIFTS Lifts the Administrative Burden Off Small Foundations

Background

The McLean Foundation burst onto the philanthropic scene of rural Humboldt County in California in January, 2000. Though their mission is to benefit displaced timber industry workers, main funding areas currently include children/youth and social welfare. Because they are a small organization, the vast majority of work at the McLean Foundation is done by one person wearing many hats making it a big job. For Leigh-Pierre Oetker, Essential GIFTS makes that job manageable.

In their first three years of funding the foundation distributed more than \$3.5 million in grants. Oetker uses Essential GIFTS, the streamlined version of the comprehensive GIFTS grants management system to keep track of it all. Essential GIFTS includes the core functionality of GIFTS, for small to mid-sized organizations who just need the basic functionality, like tracking, simple coding capabilities and reporting.

Leave the tracking to Essential GIFTS

When the McLean Foundation funds a non-profit, payments are made based on a multiple-payment schedule. For instance, one grantee might receive its full funded amount within 25 payments over the course of one year. With hundreds of multiple-payment grants to keep track of, this adds up to a lot of work. Essential GIFTS keeps track of when payments are scheduled to go out and the remaining balance is scheduled to be paid.

"I know exactly what date the check went out and who it went to. I like that. That's what I'm doing on a day-to-day basis, I'm tracking all of my grantees and seeing where they are," Oetker says.

With Essential GIFTS, information can be found and reported on in a snap

Information can be cross-referenced and brought up in seconds, be it names, check dates or past grants. And when it comes time to report this information to the board, Oetker uses just the information she wants.

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"Because we're a smaller foundation, we don't need to do a lot of bigger reports. I can do a search on approval dates for a certain round, and print that out and give the board a total for that round. Or let them know what our preliminary reviews are going to look like for the upcoming round. I don't have to overwhelm my board with information they don't want."

Customized coding keeps everybody in the loop

Oetker's day-to-day work consists largely of keeping track of the over 350 grants given out over the last three years, "which is a lot for one person to follow," she muses, "so what I did was create really good coding categories so I know which phase a grant is in. If it's in final consideration for granting, or if I'm waiting for an evaluation, I know it's in that phase. I created coding categories that really reflect what we need, which I love. I love being able to manipulate that."



CLIENT STORY

MELVIN AND GRACE MCLEAN FOUNDATION

Freeing up the small foundation to do the work that they do best

The heart of philanthropic work isn't in the office. It's out in the field, finding what needs to be addressed. Essential GIFTS takes much of the administrative burden off of the staff whose time can be better spent.

"Essential GIFTS really gives me the ability to do the other things I need to do — talking to non-profits, collaborating with non-profits, finding the best fit for our mission. Those are the kinds of things I like to do. Be out in the community, doing the work the foundation wants me to do versus trying to [keep] track of all these grants all the time."

Essential GIFTS was built to keep things simple and organized, so foundations can do exactly what the McLean Foundation does, focus on creating impact without getting bogged down with endless administrative work.

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Benefits:

- Saves time
- Makes tracking easy
- Coding can be customized for your specific needs
- Reporting is easy
- Specific information easily found

For more information on MicroEdge's Solutions contact:
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