



CLIENT STORY

MONTEREY PENINSULA FOUNDATION - EssentialGIFTS

PROFILE

Type: Private Foundation

System: Essential GIFTS - Single User Version

Background

More than fifty years ago, Bing Crosby invited a group of friends to get together for some golf, a clambake and, most importantly, to raise a little money for the local charities... the rest is history. Since that time, the golf tournament, now known as the AT&T Pebble Beach National Pro-Am, has become one of the most internationally recognized stops on the PGA TOUR and the spirit of giving initiated so many years ago has continued to develop and expand through the commitment and vision of the Monterey Peninsula Foundation and the AT&T Pebble Beach National Pro-Am Youth Fund (which is also overseen by the Foundation). Today, the Foundation makes grants in interest areas that include youth, education, health, human services, arts, community and environmental programs. In 2003, the Foundation and Youth Fund made nearly 300 grants and in-kind contributions and distributed \$3.1 million.

"I now can track our grant applications, generate reports and send correspondence to applicants with a few mouse clicks"

Laurel Lee-Alexander, Director of Grant Programs, oversees the Foundation's entire grant-making process. Before Laurel joined the Foundation in January of 2003, they had never had a full-time staff person dedicated to grant-making. She brought 11 years of experience in the nonprofit world to her new job, and one of her first major decisions was to purchase and implement Essential GIFTS from MicroEdge. Previously, grant data had been tracked in a customized Access database, and grants made from the Youth Fund were administered separately at a local law firm. Some of the data was also being re-typed into Excel spreadsheets for use in correspondence and reports.

Laurel knew there was a more efficient way to manage her grant data.

"I find the interface to be extremely user-friendly, quick and responsive."

Essential GIFTS Benefits:

- Data entry is more efficient now that information is entered only once.
- Foundation staff can review their entire giving history to each organization, including in-kind contributions.
- The user-friendly interface is easy-to-learn, quick and responsive.
- Correspondence is generated quickly and easily, just by adapting the existing Essential GIFTS letter templates.



"My time is now spent more efficiently – I enter application data once and can generate correspondence quickly."

Essential GIFTS Streamlines the Foundation's Processes

Since Laurel implemented Essential GIFTS, she has found that her time is spent more efficiently – she enters the Foundation's application data once (where she used to use two different databases for tracking and mail merge operations) and she can generate correspondence quickly and easily. She says, "Essential GIFTS is easy to use. I especially like the correspondence module – it's fantastic!"

She adds, "Using Essential GIFTS has streamlined the grant-making process for us in many ways; I now can track our grant applications, generate reports (including a list of applications our Grant Committee will review for decision-making) and send correspondence to applicants with a few mouse clicks. We are also tracking our in-kind donations with Essential GIFTS." Previously, in-kind contributions had been tracked separately, preventing Laurel from seeing the whole picture of giving to each organization. She says that being able to track in-kind gifts "was something I didn't anticipate. One person will be coordinating all the donations going out to nonprofits instead of doing it piecemeal."

Laurel has also taken over the Youth Fund grant-making program, which again adds to her ability to see an organization's complete giving history. Before she took this program over, organizations were occasionally receiving grants from both funds, which is against the Foundation's grant-making guidelines.

Laurel took the standard Essential GIFTS Grant Summary Write-up and modified it, so that it now looks virtually identical to the report her Grant Committee is used to seeing, and it contains all the data they need to make funding decisions.

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Essential GIFTS Training Allowed Her to Get Up-to-speed Quickly

Laurel attended an Essential GIFTS training course in San Francisco before she started using the software. She says, "The two-day training I attended was excellent and the materials provided made it easy for me to get up to speed quickly. I find the interface to be extremely user-friendly, quick and responsive." She especially appreciates the training binders distributed during the course, and finds the Essential GIFTS User's Guide and the Using GIFTS Reports book very helpful.

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