



CLIENT STORY

Rochester Area Community Foundation

Community Foundations find time and donor satisfaction with DonorCentral and SuggestionCentral

Background

Rochester Area Community Foundation (RACF) has been using MicroEdge's Foundation Information Management System (FIMS) since the early days of charitable software in 1996, when most software packages were stand-alone and accomplished only specific foundation tasks.

RACF, a community foundation that enables donors to give through individually guided funds, adopted the integrated FIMS system to help them successfully manage their financial and administrative needs. It has served them well over the years, but now, as Chief Operating Officer Jeffrie Leahy and Vice President of Donor Services Bonnie Hindman explain, they need a solution that's not only integrated with internal systems, but can reach out beyond the walls of their own core operating system and empower the donors. That's why they decided to expand their FIMS system with DonorCentral and SuggestionCentral from MicroEdge. DonorCentral and SuggestionCentral give donors online access to their funds and a new voice on how they should be managed.

Keeping up with donor expectations

"Donor expectations keep ratcheting up. You do your banking online, you look up your investments online, you expect to be able to open accounts online, you do shopping online... We expect information to be there and be there instantaneously," Says Leahy.

Donors in the information age expect the foundations they give to and work with to embrace the same technology and provide the same convenience that other industries do. This is why DonorCentral and SuggestionCentral were created.

DonorCentral is a Web-based service that provides fund advisors private and secure access to information about their funds- from contributions to the fund and grants made from it, to account balances. In addition to entering grant suggestions online, SuggestionCentral lets donors browse a list of foundation-approved charitable projects and select one to add to their "shopping cart" of grant recommendations.

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-Jeffrie Leahy,
Chief Operating
Officer

Saving foundation time while improving donor relations

Another benefit of DonorCentral and SuggestionCentral is the time it saves foundation staff in fielding calls and looking up information. Since the information is available online 24/7, donors don't have to wait for office hours and a free staff member to talk to.

"In addition to using DonorCentral for advised funds, we've used it in ways it wasn't originally intended - for funds that actively fundraise and for program sponsor funds. Previously, those funds would request monthly reports, but we've been able to stop doing that now with most of them. They can see the gifts for themselves almost immediately which has decreased demand on staff time. That has definitely been a plus," says Hindman. Or, as Leahy puts it, "We're learning how to use DonorCentral as another employee and how to have it work hard for us. It's definitely had an impact. We tell the fund reps our schedule for posting gifts and grants and that they'll see last week's gifts on such-and-such a date, and there they are. The fund reps love it and it saves the staff time."

Personal relationships as the goal, not just automation

RACF's "Giving Opportunities" forms were previously hard copy forms for advisors to suggest smaller, more targeted opportunities for their grants to support. Now online, they are more accessible for the advisors, and because of the forms there is less retyping of data for Foundation administrative staff.

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personal relationship. These tools help them to get basic information as easily as they can and to automate transactions so that staff can then spend our time with donors in more in-depth and meaningful discussions about their giving and about our giving opportunities."

DonorCentral and SuggestionCentral Benefits

- ◆ Better access for donors and fund advisors to their accounts means greater control and satisfaction
- ◆ Online suggestions for giving are quick and easy
- ◆ Staff time in fielding routine calls is reduced
- ◆ Retyping mailed-in forms becomes unnecessary, saving time and reducing errors
- ◆ Relations between foundation and donors are strengthened

For additional information contact:

Phone: 603.224.3400x318

Email: fimsinfo@microedge.com