



# CLIENT STORY

## SAN ANTONIO AREA FOUNDATION

### PROFILE

Type: Community Foundation

System: FIMS, IGAM



San Antonio Area Foundation  
Your Community Foundation

Community Foundation eases the burden on their Grantees by accepting Online Applications & Proposals through their Website.

### Background

In 1964, the Nat Goldsmith Memorial Trust was established to inaugurate the San Antonio Area Foundation and provide for its initial funding. That first year, the fund had total assets of \$21,019 and distributed \$868 to charitable causes. By the end of 2003, the San Antonio Area Foundation had assets of \$110 million dollars in 309 funds. In 2003, the foundation distributed nearly \$2 million in 119 discretionary grants. The San Antonio Area Foundation supports animal services, arts and culture, community and human services, biomedical research, education, environment, historic preservation, medical services and health care, visual research and visual services throughout San Antonio, Bexar County and the surrounding area.

In 2003, the foundation implemented the Internet Grants Application Module (IGAM), which allows them to accept grant applications and proposals via the foundation Website.

The San Antonio Area Foundation began using the Foundation Information Management System (FIMS) from MicroEdge in 1998.

FIMS is a comprehensive software product specifically designed to help community foundations with their information management needs. In 2003, the foundation implemented the Internet Grants Application Module (IGAM), which allows them to accept grant applications and

proposals via the foundation Website. Data from the grant applications is automatically imported (after being reviewed for accuracy) directly into the foundation's FIMS database. Lydia Rodriguez, the foundation's Program Officer for Discretionary Funds, is the staff person who took on the responsibility for implementing IGAM.

### IGAM saves the foundation tremendous amounts of data entry

Although 2003 was the first year the San Antonio Area Foundation used IGAM, over 300 (out of 362) grant applications were successfully completed online, reviewed by foundation staff, and then downloaded into FIMS. The foundation does not require that applicants use the online application;

they can still choose to submit applications in hard copy. However, by running IGAM reports, Lydia could see which organizations were working on their applications online. "Sometimes I wanted to phone them and tell them to submit it [the application] online because it saves me so much time in data entry," she says. Lydia estimates that each hard copy application received takes about 15 minutes to enter into FIMS; the reviewing and updating of the 300+ applications received online via IGAM took about 3 minutes each.



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### Implementing IGAM

The San Antonio Area Foundation accepts grant applications in one two-month-long period each year. The foundation put the IGAM application on their web site during the first week of October, 2003 and all applications were due by December 1, 2003. In July 2003 Lydia began working with IGAM, laying out the application that would eventually go online. "For the first couple of weeks, I read the manual and just practiced with the system and got a handle on how it worked," Lydia says. By the time a MicroEdge staff member came to train the foundation staff on IGAM, Lydia had already laid out her application, enabling her to use the training time for fine-tuning. "It was really, really helpful to have had the time to work with the software before the training," she says. "It was also great to be able to design our own application instead of contracting it out."

Lydia used IGAM to develop an eligibility quiz at the beginning of the application to pre-screen applicants, thereby saving ineligible organizations from completing applications that could not be funded. The eligibility quiz checked on each organization's geographic eligibility and tax status. In fact, applying organizations had to enter their 501(c)(3) number before they could actually access the application.

Once the grant application was posted on the foundation's website, the foundation hosted two 1-hour meetings to train area nonprofits on how to complete the application online. After the trainings, the foundation continued to provide telephone assistance to the nonprofits: "With IGAM we were able to bring up the individual application [on their computers] and help applicants put the right data in the right places all the way through the process," Lydia says. The first complete online application arrived during the first week of November.

### MicroEdge training and support ease the implementation process

Lydia found setting up the application and the forms "fairly convenient." But, she says, "Kevin (a MicroEdge support specialist) helped a tremendous amount. If I had not had his support, I would not have been able to go through this process. He never left me hanging. Even after the funding cycle, when we took the application offline, he continued to call and see if we needed anything." And Lydia strongly believes that her training went so well because she had taken the time to review the manual and work with IGAM beforehand.

Lydia has already submitted a request to MicroEdge for an enhancement to IGAM that she believes will make it easier for her potential grantees to submit applications in 2004. In 2003, 56 applications were incomplete in some way – the foundation hopes to reduce that number for 2004. She says, "This year will be much easier for us because of all that I learned in the first year."

### IGAM benefits:

- Significant reduction in foundation staff time required for data entry
- Straightforward application and eligibility quiz creation
- Reporting allows foundation staff to track which organizations are working on applications
- Ability to review and update applications before downloading

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