

# CLIENT STORY

## CINERGY FOUNDATION

### PROFILE

Type: Corporate Foundation

System: GIFTS

Modules: IGAM



Online grantmaking enables foundation manager to single-handedly administer and process 1,500 grants per year at the Cinergy Foundation

### Background

Cinergy Corp. was formed by the merger in 1994 of The Cincinnati Gas & Electric Company (CG&E - Ohio) and PSI Energy, Inc. (Indiana). The Cinergy Foundation combines the PSI Foundation and CG&E's corporate contributions program, maintaining commitments made by the companies to remain actively involved in local philanthropic efforts. The mission of the Cinergy Foundation is to be a recognized leader in corporate citizenship by creating proactive, innovative partnerships that improve the quality of life by reinvesting in the communities that the corporation serves in Indiana, Southwestern Ohio and Northern Kentucky. The Foundation encourages initiative, creativity and collaboration by contributing to the total well-being of these communities in three areas; Arts and Culture; Lifelong Learning; and Healthy Communities.

For the Cinergy Foundation, support takes many forms, as contributions are made through funding and in-kind resources. With over 1,500 grants made per year — about 35 grants per week — there are a wealth of details to remember and an abundance of administration responsibilities, all of which is handled by a single individual, Karol King, Manager of the Cinergy Foundation.

**“The organizations that apply for grants love the IGAM system.”**

### The Challenge

Since 1999, the Cinergy Foundation has been using the MicroEdge GIFTS™ Grants Management System to successfully manage their giving programs, citing its comprehensive feature set, ease of use, and the company's in-depth understanding of both technology and grantmaking among the key reasons for choosing MicroEdge solutions. Through GIFTS, Karol coordinates the Foundation's giving between multiple corporate offices. Although most grant decisions are made through the board,

additional discretionary funds called "pots of dollars" are awarded and distributed by area managers in various locations throughout Indiana, Kentucky and Ohio.

Working with a "one-person" staff, Karol has to assume the responsibilities of multiple staff members. One of the most time-consuming aspects of her diverse role was the coordination of a growing number of grants between numerous locations, which involved loads of paper. Each grant application required up to 10-12 copies for review committee boards to evaluate, and many bulky packages were being sent back and forth through the mail. *"With deadlines every quarter and most application submissions being made at the last minute, I would find myself facing stacks of grants that were becoming increasingly difficult to process in a timely manner,"* says Karol.

### The Approach

The Foundation had to address the mounting difficulties posed by having a one-person staff, yet they still needed to be as effective as possible in their giving. In order to come up with an able solution, Karol was directed to "improvise and be progressive." And so she was. Karol knew that in order to make things work for her, for the foundation and their grantees, she must find a way to further streamline and automate their workflow processes so that time-consuming administration tasks could be minimized.

# CLIENT STORY

## CINERGY FOUNDATION

The grant application processing was the most arduous aspect of their operations, because so much of it involved manual, labor-intensive tasks. Plus, the influx of applications four times per year created an unmanageable situation each quarter, while other times of the year were not as hectic. Karol turned to MicroEdge for assistance.

### The MicroEdge Solution

In June 2002, The Foundation implemented IGAM Internet Grant Application Module in order to establish greater efficiencies in their grant application and review process. IGAM would enable the foundation to be rather progressive — to accept and manage grant applications via the Internet, an innovative practice that only a small percentage of foundations were adopting then — and at the same time it would bring significant automation to an otherwise labor-intensive process.

In addition to implementing IGAM, Cinergy Foundation also eliminated most of their deadlines, with the exception of their annual volunteer incentive program. Now, all grant applications are accepted on a rolling basis. This refinement has also improved the workflow — the grants system flows down the stream very equally and quickly, instead of having some of the major hold ups that the foundation experienced in the past.

### Easy administration, and virtually paper-free

"I just cannot speak highly enough about IGAM," says Karol. "It's an extremely efficient way of working." In fact, IGAM has helped the Cinergy Foundation to gain substantial efficiencies in their grant administration process — making it so smooth that a grant application is often handled the same day it is received. "With IGAM, it's possible to get an online submission at 2:00 p.m., and run the entire process through its course and have the check in the mail the very next day."

With IGAM, Karol can easily view all grant titles on the screen of her computer. She then takes the application through a linking process to bring it into GIFTS, works directly in GIFTS with the grant and distributes the application to the appropriate managers. Once the appropriate manager has reviewed the application they quickly reply to Karol, who in turn replies to the

organization. "From the time the grant title appears on my screen... through the entire process, and finally printing out and mailing the check, it is simply a delightful process," exclaims Karol.

And now, instead of stacks and stacks of paper applications with all their attendant attachments, the Cinergy Foundation has next to no paper. "Virtually the only piece of paper I send out from this office is the actual check to the organization."

### Large volume of grants processed by a single individual

The Foundation receives more grant requests than ever, and whether it's a \$25 or \$25,000 request, it is still the same process. In response, IGAM has helped Karol to more efficiently manage and process this larger volume of grant requests with less staff. "In all honesty, using IGAM our grants process takes 40% - 50% less time. And with one person doing the work of many, there's no way we could do it without IGAM."

### An even better system-with lower operating costs

IGAM has helped the Cinergy Foundation generate a wealth of efficiencies in their grant application and review processes, and in doing so they even reduced their overall operating costs. And to both inside and outside observers, the Foundation continues to be a leader with their progressive approach to grantmaking.

**"IGAM is being used for every program-grants and matching gifts. Our grantees, employees and retirees are all using IGAM. Everyone loves the system. We always get compliments about how easy and efficient it is. And organizations love it because the turnaround time is phenomenal."**

For more information on MicroEdge's Solutions contact:

Phone: 800.899.0890 x250

Email: [gifts@microedge.com](mailto:gifts@microedge.com)