



With FIMS CRM and Development Process Changes, GHCF Increased its Donor Base, Quadrupled Assets



When it comes to growth, change brings success.

The challenges facing the Greater Houston Community Foundation (GHCF) two years ago were the same that many foundations, both large and small, have continued to grapple with: How can you effectively increase your donor base and nurture those relationships to grow your foundation? For the GHCF, a top-down assessment of best practices gave the organization fresh insights into what it needed to do, not only to maintain its donor base but continue to increase it.

Growing by Leaps and Bounds

The Greater Houston Community Foundation was formed in 1971, but remained inactive until 1995. In 2001, a new CEO came on board. Recognizing the organization's true potential was high on his list, and the foundation focused heavily on donor intent. GHCF's donors were granting an estimated 18 – 22% of the foundation's assets each year, which made donor development essential, not optional. Donor service was a point of pride within the organization and face-to-face meetings with prospects nearly always resulted in the opening of a new fund. Firing on all cylinders, GHCF maintained solid growth in its early years. But in 2008, GHCF hit a snag: the economic crisis. Potential donors were cutting back, making it more difficult to open new funds. And referral sources – which had been primarily obtained through board

members – started to tap out. GHCF deemed that in order to sustain its growth, it would need to make changes in how they worked.

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Controller

Time for Change

Over the past eight years that controller Ed Padar has been on board at GHCF, he has taken note of all the things it had done right. “Whenever a prospective donor called us, we took care of them,” he said. “We normally closed nearly 100 percent of the face-to-face meetings, with the end result of opening up a new fund.” But, the key to continued growth would be expanding its outreach. To do that, the organization would have to change. “We started to look at how others in our area were doing,” said Ed, who is responsible for the finance and IT operations at GHCF. “From the insights we gained, we developed best practices for our own development.”

While there were many insights they gained from their conversations, some key takeaways emerged and the foundation made a few important changes.

Tracking touches with prospects – Although staff were meeting on a regular basis with prospective donors, they did not have a system for tracking that activity, the types of meetings they were having, or the outcome of each. Tracking time spent with potential donors, creating checklists of activity, background on donors, were all information that they would begin to gather from that point on.



Realigning staff with a focus on new funds — Previously, the entire development staff would handle both existing and new funds. Changing the approach so that staff focused strictly on new funds enabled the organization to streamline and refine efforts.

A Change for the Better

More meetings and detailed activity tracking meant that more information needed to be organized and shared across the organization. Initially, GHCF tried to track this information in FIMS, but found that it took a lot of manpower and FIMS did not give them all the capabilities needed. A more robust donor management system was in order. “In essence, the best practices that we were developing prompted us to move to FIMS CRM,” said Ed.

MicroEdge FIMS CRM is a system that drives more effective prospecting and donor management through process and best practices. It creates more efficient development teams by streamlining the tracking and management of development activity; strengthens ties to donors by enabling foundations to better leverage collective knowledge; and manages campaigns and events efficiently. FIMS CRM is an online and hosted solution that is fully integrated with FIMS.

Adopting FIMS CRM made sense on many levels. “When we looked at the cost of a staff member’s time versus the cost of FIMS CRM, it was a very easy decision to go with FIMS CRM,” said Ed. And it paid off. By 2010, the Greater Houston Community Foundation grew its assets to \$300 million, while increasing their donor-advised funds to more than 1,200.

The biggest deal changer? — Increasing the number of face-to-face first meetings. “The more first meetings we scheduled, the better results we achieved,” said Ed.

FIMS CRM helped GHCF to put new practices into place, and also helped them attain some of the following benefits:

Better reporting — In development, one of the key things to track is the number of times staff does something. It could be the number of times staff meet with prospects, how many first-time meetings they had in a month, the different types of meetings they had — whether it was for a corporate product, donor-advised fund, financial or foundation services. “Using FIMS CRM, the foundation started tracking all the times, and ways, staff met with a prospective donor, and the board received a much clearer picture of our development efforts,” said Ed.

Quality reporting — Tracking the cycle of a fund, from first meeting to establishment of the actual fund, is important for the wealth of information it can offer. “FIMS CRM helps us monitor and evaluate what the typical time gaps are for some of our different products,” says Ed. “For example, when we look at foundation services and corporate products, sometimes it’s a one-year cycle. It’s important for us to see how our results track over the longer-term.”

Before GHCF changed its practices, development staff would spend 80 percent of their time in the office. Now they spend a lot more time out of the office meeting with prospects. And they enter those meetings much better prepared. Now, if development staff — or anyone at the foundation — needs to interface with a donor, all of the information is there in FIMS CRM, and they have so much more insight. They can now see everything they need to know, quickly and easily, before they get to the client’s office. Ed asserts that “there is so much untapped potential in FIMS CRM, it’s mind-boggling.”

Greater Houston Community Foundation knows that the world has changed and will continue to change — to be successful, one must be willing to change with it. “With the help of FIMS CRM, we proved that sometimes you just have to do things different to make a difference.” Looking at the results and significant growth that GHCF has achieved, it’s clear that their changes have truly made a difference.

