

Client Story

Dater Foundation

Better Grantmaking with GIFTS® Online.
Once buried in paperwork, the Dater Foundation is able to focus on giving.



**CHARLES H. DATER
FOUNDATION**



Beth Broomall, like many grants coordinators, was doing it all at the Dater Foundation, whose mission is to enrich the lives of children. Over the span of 20 years, Beth's duties grew as the foundation grew. And so did the

piles of paper on her desk. By 2010, much of her day was spent making copies of applications, mailing documents, and manually entering data into Essential GIFTS.

"I used to spend 80 percent of my time trying to get through the paperwork," she says. "It was really difficult for me to provide as much valuable input into our decision making process as I wanted to." She was on an endless treadmill of compiling applications, filing paper copies, and preparing packages to mail to board members and grantees. As the number of grant applications grew five-fold, from 100 in the early 1990s to nearly 500 today, the foundation's manual, paper-based process was at its breaking point.

Beth knew she needed a better way, and she began to consider her options. Soon after, the foundation brought on a new board member and things really started to move forward. Determined to steer the foundation away from its mounds of paper, he set a goal to transition the foundation to an online system and process. Now they just needed to decide how to bring their process online, and which grants management solution to choose.

The foundation considered a number of online grants management solutions. Ultimately, they chose GIFTS Online. According to Beth, not only did it offer the features they needed, "we were happy with MicroEdge and wanted to stay with the product. We felt most comfortable handing our data over to the company that developed the original package."

It's been just over a year since the foundation made the change, and they continue to experience just how much GIFTS Online can help them do things better.

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— Beth Broomall, Dater Foundation



With GIFTS Online, the Dater Foundation has:

Reduced the preparation time for board meetings from two weeks to three days.

Beth previously spent two weeks each month inputting data, and another week capturing and entering comments from board members. It was extremely challenging to enter all of the information manually, track down evaluations, copy reports and coordinate delivery to board members. Now, preparing those same documents takes her just three days, and delivery is instant.

Drastically reduced the work required to process applications.

Receiving applications by mail and manually entering them into Essential GIFTS took up 80% of Beth's time. With GIFTS Online, all the data is already entered. And it's easily accessible by every board member.

Eliminated mailing and paper costs.

Beth used to print five copies of each application, along with recommendations and evaluations. The office went through a staggering amount of paper, not to mention that each board member would receive a 10" stack of paper each month. Plus, Beth would also have to mail these packages to board members, keeping track of which applications she'd already sent to each board member, and which ones were new – a daunting task. Now, board members can just log in to GIFTS Online, and everything is right at their fingertips.

Made the process easier for grantees.

Grantees can complete their applications more quickly, resulting in a quicker turnaround time for approvals, and they appreciate the fact that they do not need to mail in multiple copies. "For every issue that has come up, I can find a solution that is a lot easier than it would have been for me a year ago," says Beth. And as the primary contact for grantees, Beth finds her job more satisfying, as well. "Now, I have the opportunity to really talk to our grantees and help them. I can go through the process and look at what the grantee is trying to accomplish," she continues. "GIFTS Online really adds value to the decision-making process."

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