



CLIENT STORY

The Jewish Federation of Greater Houston

Houston Jewish Federation's Transformational Switch to FIMS

Background

Since 1936, the Jewish Federation of Greater Houston has been reaching out to the Jewish community of Houston, giving over \$100 million in that time. The Federation provides guidance in education, policy making, and through its programs and services creates "transformational experiences" which change the way people view the local and global Jewish community.

Carol Rushing is the Finance Associate for the Houston Jewish Community Foundation, which handles the funds that keep the Federation operating and keeps track of the books. Rushing describes how the whole organization went through a transformational experience of its own four years ago when they bought FIMS, MicroEdge's comprehensive suite of donor management, grants management, and foundation accounting modules.

FIMS streamlines processes

"Our old system was a database the Federation used to track pledges and what have you. We hired a programmer who wrote an accounting program to go with it," says Rushing as she describes their previous accounting system, which was customized but inflexible.

"Every journal entry I did was a four-part entry. Each entry had to be input and closed at the same time, and there was no way to generate reports." On top of this, their system couldn't be altered or built upon without the aid of the original programmer, a problem FIMS doesn't have. "It was a mess. FIMS was a Godsend."

One of the most useful functions of FIMS Rushing has discovered is the easy of journal entries.

"The entries are created automatically. It's like not having to do any work at all. I almost never have anything where I actually have to go into the General Ledger with a journal entry."

Now I do a lot of work I couldn't have done then. Reports, for example, and not just in accounting but also gifts, grants, and whatever. We can get exactly the information we want on all our reports."

-Carol Rushing,
Finance Associate

The FIMS' General Ledger module is designed to accommodate the accounting needs of any organization, reporting at the foundation level or at the fund level, as the Federation needs.

Now fund statements are made with a routine ease.

"They looked horrible before, for the amount of work we were putting into them," says Rushing about the fund statements made on the old system. "These generate automatically. They are absolutely fantastic."

Time, a foundation's greatest asset

Another advantage to FIMS is the time it can save an organization. Much of what FIMS does-making journal entries, reconciling funds and creating statements and reports-is automatic.

"Using the old system was an all-day, every day type thing. Now I do a lot of work I couldn't have done then. Reports, for example, and not just in accounting but also gifts, grants, and whatever. We can get exactly the information we want on all our reports."



(continued)
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Ease-of-use

And because FIMS is so easy to use, staff can pick it up in a hurry and hit the ground running. Rushing says six of her staff members were able to pick it up easily, and the customer support has been top-notch.

"If you dream it up, FIMS can do it. Everything we've wanted, it's done."

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FIMS' advantages:

- ◆ Saves time
- ◆ Easy to use
- ◆ Great customer service readily available
- ◆ High-quality, presentation-ready reports available at the touch of a button

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