The Winnipeg Foundation
Established in 1921

PROFILE

Type: Community Foundation
System: Foundation Information Management System (FIMS)
Number of users: 19
Assets: $330 million Canadian in 1,526 funds
2003 Giving: $13.7 million Canadian distributed in 1,070 grants

Background

Founded in 1921, The Winnipeg Foundation is Canada's first community foundation. The Foundation was created by William Forbes Alloway, a successful Winnipeg banker, with a $100,000 donation. In 1922, the Foundation made its first grants, totaling $6,000.

The second gift, a 1924 anonymous donation of three $5 gold coins, has come to symbolize the spirit of The Winnipeg Foundation — that any gift, no matter the size, makes a difference in their community. Since then, in its more than eight decades of history, the Foundation has distributed over $125 million, back into the community.

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Maretta came from the nonprofit sector, where she had experience with database management systems for nonprofits. She quickly realized the Foundation's system was totally inadequate for its needs. She took the opportunity to visit four other Canadian community foundations to see how they were using technology and software in their foundations. After those meetings, she recommended the organization implement the Foundation Information Management System (FIMS) from MicroEdge.

The Foundation began using FIMS at the start of 2000. With more computer experience at the time than many other staff members, Maretta was responsible for FIMS implementation and for establishing the Foundation's coding system within FIMS. One of the early challenges was convincing staff that FIMs could do it all; it wasn't just an accounting system — it would also provide tracking, monitoring and many reporting functions on all Foundation activities."

Today, she says, "Staff absolutely love using FIMS — they can't imagine being without it! It's been a complete adaptation by staff."

Foundation makes the switch to FIMS

Maretta Emery, Director of Finance and Gift Planning, joined the Foundation in the fall of 1998. At that time, the Foundation was using an antiquated software program that had been custom-written for it in the early 1980s. The program essentially provided staff with lists of contributions to the foundation and grant payments. Checks were produced manually, and the system contained no ability to input donor information at all. In addition, a local mailing house maintained a separate mailing list for the Foundation.

FIMS allows the Foundation to grow

Maretta firmly believes that FIMS is a key contributor to the exceptional growth the Foundation has realized in the past few years. In late 1998, the Foundation's assets were about $150 million, and today they are at $330 million. About two years ago, the Foundation received a $100 million gift and Maretta acknowledges that before FIMS, it would not have been able to manage a gift that size as effectively. She says, "FIMS positioned us to be able to grow. You have to have all your back office functions working well before you can go out to donors and provide Top-notch services."

Darlene Ott, the Foundation's Financial Administrator, agrees. Foundation staff has spent a tremendous amount of time developing processes that ensure they take full advantage of the FIMS features and functionality. Developing system policies and procedures is an ongoing process, but the benefits substantially outweigh the time spent updating the processes. Currently, the Foundation is developing a set of "best practices" documents. "Our grants department process works very well, and we're proud of it. We're documenting it to share with other foundations and to serve as a training tool internally as well," Darlene says.

FIMS helps the Foundation manage large volume

Today, The Winnipeg Foundation manages well over 1,500 funds and believes it couldn't handle that volume without the FIMS system. Darlene raves about the FIMS Fund and Account Tracking System module (FACTS): "Reconciliations for 1,500+ funds and the ability to get earnings and fees allocated is all automated! I can't imagine doing it manually."

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Since implementing FIMS, the Foundation has become much more structured and efficient. These days, it cuts checks twice a month instead of producing a check whenever someone asks. It also has better internal control from an audit perspective. Darlene says, "Auditors love the way we apply security controls to our data." Maretta adds, "We have a lot of integrity in the data, because we have our processes automated. It's critical that the information be accurate and transparent."

Because back office and foundation administration processes are automated, the foundation can handle much larger volume with the same number of staff, and can do everything in a timely fashion. One favorite FIMS feature among the staff is document management. Fund agreements, grantee reports, correspondence and a variety of supporting documentation are scanned into the system, where staff can quickly and easily access exactly what they need. Maretta says, "We're less paper-based than we were before, because everything is at our fingertips."

Staff also credit the Contact Tracking System, with its pop-up tickler file for reminding them of important meetings and events. And Maretta says she couldn't do without the ability to attach multiple Affiliations to any Contact in FIMS. "If I want to do a mailing to professional advisors, they're coded so I can easily pull them out," she says. In addition, the Foundation CEO uses FIMS daily to check the Foundation Status report.

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Training and support from MicroEdge is tremendous

About six months after the Foundation implemented FIMS, a MicroEdge staff member came to train Foundation staff. Maretta says that for some, the learning curve was pretty steep, largely because the Foundation had previously turned to one staff member for needed data. Today, she says, staff are much more comfortable with the system and now handle new tasks independently. It recently used Webex for a grants reporting training session with a MicroEdge trainer, and grants staff found it very useful.

Maretta says, "Service is tremendous! This was a big selling feature; when I looked at other foundations [using MicroEdge products], everyone commented on the great service." Today Darlene is the primary staff person who deals with MicroEdge directly, and she can often solve staff questions or issues on her own.

The Winnipeg Foundation is preparing to host the first Canadian FIMS User Group meeting this year. MicroEdge is sending staff to participate in the meeting. Their goal is to develop FIMS "best practices" among Canadian community foundations. Darlene says about the user group, "Collaboration is for the better, for everyone!"

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