Barnabas Foundation Streamlines Charitable Services and Planned Giving Operations

Overview

PHILANTHROPY PROFILE
Guides and assists Christians to understand biblical stewardship while learning the joy of living a generous life.

ORGANIZATION SIZE & SCOPE
- Provides critical resources to 200 Christian charitable organizations of all types.
- Manages assets of $320M
- Offers Steward Funds (DAFs), Restricted Funds, Charitable Annuities/Trusts, and charitable asset management for foundations and churches.

GOALS
- Assist Christians to realize the full potential of stewardship to enhance God’s work on earth.
- Eliminate 4 systems and a dozen monthly spreadsheets.
- Implement an integrated and scalable enterprise solution.
- Sustain expected transaction growth of 5% per annum.

Additional Challenges
- Needed to analyze, cleanse and standardize 30 years of data.
- Project decisions required and enabled re-examination of operational processes.
- Required data migration from 4 different and dis-integrated software systems and a dozen detailed spreadsheets.

SOLUTION
iPhi Core Enterprise™
iPhi DonorView™

“In order to better serve our donors, constituents and community, timely access to data across our entire philanthropic program was critically important to us. We needed a single system to capture valuable information, reduce manual staff labor and create a more efficient operation for our donor stewards. Our close relationship with Stellar has enabled us to realize these goals and to build a solid program with capacity for future growth.”

David Schutt, Director of Finance and Administration
Barnabas Foundation

For almost 40 years, Barnabas Foundation has been advancing God's kingdom by providing quality Planned Giving and Estate Planning services, which enable caring Christians to strengthen support for the ministries of nearly 200 member organizations. The Foundation helps Christians make tax-wise decisions about their financial resources while offering stewardship education and development programs for churches and member organizations. These programs serve as a catalyst for churches and ministries to encourage good stewardship according to biblical principles.

As part of its program, Barnabas Foundation (BF) offers estate planning, complex gift assistance, stewardship education, outsourced administration of CGA and Trust account programs, planned gift program training and creative content support along with information resources and webinars for church leaders. BF members include schools, churches, colleges, gospel missions, radio ministries, Scripture printing and placement, healthcare and eldercare. In addition to the services described above, BF offers Stewards Funds (a form of donor advised funds), restricted funds, charitable gift annuities and trusts, foundation asset management for charitable organizations and legacy foundations for churches.

Challenges
Prior to converting to the Stellar iPhi Solution, Barnabas Foundation used four different back office systems and a dozen different monthly spreadsheets. These systems included a trust accounting system, a general ledger finance system, a donation/gift processing system and a relationship management system. These systems were highly dis-integrated and processing routine transactions was very labor intensive. According to Mr. Schutt, “None of our previous systems were compatible and not one of them could talk with another.” Multiple layers of data entry and/or spreadsheets were necessary to upload/download data among the different systems.

Along with diverse systems, charitable business volumes were growing. At the time of the conversion, Barnabas Foundation was averaging about 100 gifts and 450 grants per month. “We were experiencing a 5% growth per year and our systems were maxed out – we were not equipped to handle this level of growth,” adds Dave Schutt. “Our user’s time and our system capacity had reached its limit. Despite our best efforts, we were starting to see increased opportunities for human and system errors to creep in.”

Solution
Barnabas Foundation selected Stellar’s iPhi CoreEnterprise™ and iPhi DonorView™ software solution. iPhi CoreEnterprise™ provides a web-based, Software as a Service (SaaS) philanthropic management platform for gift, grant, and transactional processing along with investment management, donor relations information, finance (integrated general ledger) and fund
RESULTS

The most significant change achieved by the Barnabas Foundation is the efficiency gained by eliminating multiple data entry/data file exchanges required by use of 4 disparate systems and a dozen required spreadsheets.

BENEFITS

- Efficiency gain enabled elimination of one finance FTE while concurrently increasing capacity for growth.
- Increase in accuracy reflected in fewer errors made.
- One seamless system provides standardized data to all staff.
- Improved compliance by automating internal controls.
- Saved staff time and reduced errors via automation of letters and emails to constituents.
- Reduced IT costs while increasing data security/back up via Software as a Service solution.

For Information

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management. iPhi DonorView™ is a real-time portal for donors/fund holders to view their charitable activities, recommend grants and keep up to date on key giving opportunities. After a several month conversion project, BF deployed Stellar’s iPhi Core Enterprise™ and iPhi DonorView™ in late 2011.

Results

During the conversion project, many decisions were required. It was a major undertaking to shift from not only the systems of the past, but also, to move away from older processes. According to Schutt, “it was a challenging time, but also, an opportunity to re-examine all of our operational processes to determine where improvements may be made and efficiencies gained.”

BF had 30 years of data to analyze and cleanse during the data migration process. This was a time consuming but fruitful exercise where data was normalized and standardized for consistency in the new system. In conjunction with iPhi CoreEnterprise, BF also uses Sugar CRM. Training staff and educating clients took time and effort but much of the Stellar solution is “intuitive”, adds Dave Schutt. “If staff and clients are accustomed to using an Internet browser then they can quickly adapt to the new software. During the implementation project Stellar worked closely with us to learn our specific business requirements and to enhance the system where needed. This collaborative effort has been very important through the project and continues as our business grows and changes.”

Benefits

Barnabas Foundation staff and constituents have experienced important benefits. Considerable efficiency has been gained by consolidating multiple single point solution systems into one self-contained solution. It is no longer necessary for staff to perform duplicate data entry into multiple software platforms. The need to upload/download information using dozens of spreadsheets just to perform the routine recording of transactions has been eliminated. The manual spreadsheet reconciliation effort across multiple internal systems used to take two man-weeks to complete.

“Stellar has allowed us to eliminate a staff position while concurrently adding capacity for growth within the remaining staff team,” adds Mr. Schutt. “In 2013, we processed more grants than ever before yet the process has never operated more smoothly or efficiently. Having the system automatically generate gift receipt letters and grant confirmation emails has been a tremendous benefit to the staff. We have seen a meaningful decrease in the number of errors that we used to have when we manually generated each letter in MS Word.”

Along with the efficiency and accuracy benefits described above, Stellar’s transaction based system has enabled BF to implement role-based internal processing controls. The system’s internal transactional audit trail allows BF auditors to perform their function faster and more accurately.

Barnabas Foundation stewards/fund holders directly benefit by having online access to a much more robust and sophisticated portal. “The online portal is dynamic and continually being enhanced which adds continued value for our constituents,” explains Mr. Schutt.

The Future

The Barnabas Foundation exists to assist donors and Christian charities to realize their full potential in their exercise of stewardship in all the areas of their life where God has blessed them. “We would like to reach more Christians to grow their understanding and their faith while they join God at work here during our time on earth,” adds Dave Schutt.

“Consolidating our operation into one primary platform has enabled significant efficiency and accuracy gains. These gains in turn enable our staff to reach out to more Christians in service to our mission. It isn’t enough to say that we can do more with less – it is the quality of the more that matters so much.”

Barnabas Foundation confidently looks to the future in support of Christian charitable education, generosity and stewardship.