Community Foundation for San Benito County Creates Infrastructure to Build Community Philanthropy

“We bring people and organizations together, convening diverse voices to address local issues and opportunities. Our business is building community. We needed a technology and business process service infrastructure to facilitate this important work.”

Gary Byrne, President/CEO

Since its formation in 1992, the Community Foundation for San Benito County has granted over $6 million to a variety of local causes and nonprofits. The common factor in each instance was that funds were granted to benefit the people of San Benito County. The Community Foundation make grants to community groups from funds established by individuals, families, businesses and others that want to support the work of nonprofits, schools, and other groups that address concerns in the San Benito community.

Challenges
“We administer over 100 funds which include unrestricted, scholarship, donor advised and agency endowments among others. Our previous system was general ledger based, not transaction based and did not lend itself to real-time business transactions. In order to administer our donor funds with accuracy and scale for growth, we strategically determined that a major infrastructure change was required,” added Mr. Byrne.

Solution
The Community Foundation selected Stellar’s iPhi CoreEnterprise™, iPhi DonorView™ and Business Process Outsourcing (BPO) Services 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 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. Stellar’s professional services group provides administrative BPO services freeing up Community Foundation staff to focus on critical donor services and grantmaking activities. After a several month conversion project, Stellar’s solution was launched in the autumn of 2012.

Results and Benefits
Gary Byrne explains the results and benefits. “The conversion was an opportunity to re-examine our operational processes to determine where improvements may be made and efficiencies gained. We especially appreciated the opportunity to outsource certain transactional and financial administration tasks. While our staff and board have full real-time visibility to the outsourced services activities, our staff don’t have to physically do every task in the system and can spend more time with our donors and grantee organizations.”

“We support our mission is critical. Providing our donors will online access to real-time data and connecting them with the initiatives and causes they care about was very important. We have had a very positive response from our donors who are now initiating online grant recommendations. Our Community Foundation is well positioned now and can grow and scale our business and service operation well into the future. In a time when everything seems to be changing, we are secure in knowing that our ability to serve and build our community is assured.”