PHILANTHROPY PROFILE
Based on the innovative idea of a “Community Trust”, the Foundation was born Jan. 2, 1914, becoming the first Community Foundation.

MISSION
Enhance residents’ lives, now and for generations to come, by working together with our donors to build community endowment.

ORGANIZATION SIZE & SCOPE
- 100 years of service to Cuyahoga, Geauga, and Lake counties
- Manages assets over $2.1 billion
- Stewards over 1,500 funds

CONVERSION GOALS
- Install single, integrated solution
- Insure seamless processing between constituent portals and back office
- Improve month end processing efficiency
- Extend dynamic portals to donors, grantees, scholars, committees, volunteers

CHALLENGES
- Replace non-integrated, custom back office system
- Create dynamic interface with master custodian
- Install seamless online application process

“Moving to a single, seamless processing environment was extremely important to us in order to achieve the efficiencies and economies of scale necessary in the current and anticipated future business environment. The Foundation used this important opportunity to rethink our internal processes and to achieve seamless automation of previously manual or semi manual processes.”

Kate Asbeck, Senior Vice President and Chief Financial Officer

For nearly 100 years, the foundation has lived an ethic best summed up in our modern mission statement: To enhance the lives of all residents of Greater Cleveland, now and for generations to come, by working together with our donors to build community endowment, address needs through grantmaking, and provide leadership on key community issues. Assets, around $2.1 billion in all, are in more than 1,500 separate funds representing individuals, families, organizations, and corporations.

The Foundation invests its assets in perpetuity, with distributions from the funds’ earnings being made to nonprofit organizations primarily in Greater Cleveland. In that way, the Foundation and its community partners leverage the wealth of yesterday, today, and tomorrow to create opportunities, answer needs, and fulfill dreams.

Challenges
Prior to converting to the Stellar iPhi Solution, the Cleveland Foundation used a highly customized core processing system, MicroEdge’s Foundation Power, along with several single point solutions for online portals, event management, grantee/scholar applications, etc. These systems were highly dis-integrated and general ledger centric, not business process centric. According to Jim Bickel, Director of Technology, “Our previous systems were very loosely compatible and did not communicate seamlessly with each other. In addition, many required tasks related to gift and grant processing were actually separate from the traditional general ledger centric system we used.”

The Cleveland Foundation required a unique and dynamic transactional/reconciliation interface with their master custodian bank. The high volume and complexity of transactions made this interface highly complex and truly unique. Additional challenges included poorly maintained data spanning a 100 year history. Mr. Bickel adds, “we had a significant challenge internally determining which data was required and then the corresponding task of cleaning up that data. We wanted to make sure we had quality data for this significant conversion effort.”

Solution
The Foundation engaged in a detailed Request for Proposal process which narrowed the field to two candidates. After a series of scripted onsite demonstrations, the Cleveland Foundation selected Stellar’s iPhi™ solution. The keystone of Stellar’s solution is iPhi CoreEnterprise™, a...
SOLUTION
iPhi Core Enterprise™
iPhi DonorView™
iPhi Grantee/ScholarView™

RESULTS
The Foundation has realized a seamless, single solution for staff and constituents while achieving a 50% increase in donor online portal and eStatement use.

BENEFITS
- Eliminated multiple non-integrated systems
- Reduced statement preparation time by 3 days while adding 65 new funds
- Increased number of online donor grants by 50% and facilitated more efficient donor services
- Provided tools/tracking for development staff
- Gained efficiency with automated event administration/tracking

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web-based, enterprise level philanthropic management system for gift, grant, and transactional processing along with investment management, donor relations administration, finance (automated general ledger) and fund management. In addition, the Cleveland Foundation also implemented the iPhi DonorViewTM and iPhi Grantee/ScholarViewTM portals for donors and grantees/scholars, respectively. After a fifteen month conversion project, the iPhi solution was launched in August 2012.

Results
The Cleveland Foundation’s data conversion included many years of historical data. “From the back office to the donor, grantee and scholar, Stellar’s system connects all aspects of our operation in one real-time web-based platform. It was a major undertaking to shift from not only the multiple systems of the past, but also, to move away from a general ledger centric system,” adds Mr. Bickel.

“Our previous system separated many functional gift/grant tasks from the core general ledger system,” notes Jim. “Stellar’s iPhi solution is transaction-based with automated general ledger and investment postings as the business process occurs. This is a unique approach which took some getting used to and now enables all staff to benefit from a single transactional database. The transaction-based approach also facilitated the successful and critically needed integration with our master custodian bank.” With all staff able to access a single system with timely, updated information, the Foundation is better able to respond quickly to donor inquiries.

Benefits
“It’s been two years now since our Stellar launch and we have seen multiple benefits,” states Kate Asbeck, Senior Vice President and Chief Financial Officer. “We have seen a reduction in statement preparation time by three days while adding 65 new funds. Increased donor portal use has resulted in the number of online donor grants going up by 50% and facilitated more efficient donor services.

Along with efficiency and accuracy benefits described above, Stellar’s transaction based system has enabled the Cleveland Foundation to implement role-based internal processing controls.

“In addition to increased use of the donor portal, grantees and scholars have also benefited tremendously from a seamless real-time application process,” add Jim Bickel. “Our staff can also now track prospects and record donor development activities, and even forecast the success of their development efforts. Tracking donors, prospects and events allows staff visibility to all donor and prospect activities and information which is something we did not have before.”

The Future
We were impressed with Stellar’s work ethic and commitment during the migration project,” adds Jim Bickel. “Their ability to understand our business model and relate it to real-time information access and processing was invaluable.”

“Stellar has helped us achieve our goal of a fully automated enterprise environment. In the two years since our launch, our Foundation is well positioned to continue our mission as we now have the infrastructure to support scalability and the information to self-provision our donors and constituents.”

The Cleveland Foundation looks forward to another 100 years of community service and investment.