# Overview

**Philanthropy Profile**
One of the largest not-for-profit social welfare institutions in Illinois and the central address of Chicago’s Jewish Community.

**Organization Size & Scope**
- Provide critical resources to 300,000 Chicagoans of all faiths and two million Jews in Israel and around the world.
- As of 6/30/11, total endowment of nearly $1.2 billion.
- Includes 810 donor advised funds, 42 family support foundations, 12 affiliated agency endowments and 1,000 additional funds including a variety of planned giving funds.

**Goals**
- Avoid rekeying and reduce duplicative data review.
- Increase operational efficiency.
- Capture more complete and accurate statistics for reporting.
- Match donor gift history to JF projects and programs.
- Provide an easy to use online experience for donors.

**Additional Challenges**
- Integrate endowment system with DMS (proprietary donor management system).
- Endowment system to function as subledger to combined JUF and Federation General Ledger.
- Gather data from disparate systems, databases, paper files and spreadsheets.

**Solution**
- iPhi Core Enterprise™
- iPhi DonorView™

“**In order to better serve our donors, constituents and worldwide community, timely access to data across our entire endowment program was critically important to us. We needed a single system to capture valuable information, reduce manual staff labor and match donor giving with JUF and Federation programs. Our close relationship with Stellar has enabled us to realize these goals and to build a solid program with capacity for future growth.”**

David Rosen, Senior Vice President, Endowments
Jewish United Fund/Jewish Federation of Metropolitan Chicago

The Jewish United Fund/Jewish Federation of Metropolitan Chicago is one of the largest not-for-profit social welfare institutions in Illinois and is the central address of Chicago's Jewish community. JUF provides critical resources that bring food, refuge, health care, education and emergency assistance to 300,000 Chicagoans of all faiths and two million Jews in Israel and around the world. JUF/Federation funds a network of nearly 70 agencies and programs that care for people at every stage of life, regardless of the ability to pay. Since 1900, JUF/Federation has worked to give voice to the community, and to assure that necessities are provided for its most vulnerable members—children, immigrants, the poor, the elderly and the disabled.

As part of its programs, Jewish Federation (JF) offers donor advised funds and supporting foundations to individuals interested in making their philanthropy more meaningful. These funds and foundations supplement the funds distributed by the Federation and help support the Jewish and general community in Chicago, Israel and around the world. Donor advised funds also help Federation grow its unrestricted endowment as assets remaining in funds upon donors’ deaths become part of the endowment.

**Challenges**
Prior to moving its endowment program to Stellar’s iPhi (Integrated philanthropy) Product Suite, JF faced several challenges. The previous endowment system did not provide detailed information on gifts and grants from philanthropic funds and supporting organizations. It was difficult to analyze patterns of giving, donor areas of interest and emerging trends. Donors were not able to view their funds online, grant recommendations were manually entered by endowment staff and fund statements did not provide the information needed and wanted by donors. In order to accomplish its mission most effectively, “we required the full automation of all endowment funds and the detailed activities of our donors” according to David Rosen, Senior Vice President, Endowments. “Prior to the installation of the Stellar system, endowment information was kept in separate systems, spreadsheets and/or files and was not easily accessible to our staff or to our donors in a seamless manner”.

In addition to transitioning to a web-based, real-time endowment system, JF was also designing and creating its Donor Management System (DMS) for campaign. Data exchange between DMS and the new endowment system was a critical requirement. Stellar’s iPhi CoreEnterprise™ endowment system had to function also as a subledger to JF’s overall accounting system. Mr. Rosen added that “the greatest challenge in our environment was to implement a sophisticated endowment processing system flexible enough to share data with our campaign system and accounting general ledger while at the same time providing an online experience for our donors”.

**Solution**
JF selected Stellar’s iPhi CoreEnterprise™ and iPhi DonorView™ software applications. iPhi
RESULTS
The Federation has fully automated its sizable and varied endowment operation while providing donors with online fund access and tools. Information sharing with DMS (campaign) and the master ledger completes the end-to-end operational endowment solution.

BENEFITS
- Easy access to all information provides staff with statistical data not previously available.
- Positive donor response to online ability to view fund balances and initiate online gifts/grant recommendations.
- Greater internal financial and audit control due to multi-stage transaction approvals.
- Increased efficiency by reducing data keying and use of spreadsheets.
- Automation and categorization of donor grants saves time and provides valuable data.
- Provide online data to investors.
- Increase data security and back up via Software as a Service.

For Information
Stellar Technology Solutions LLC
John Coogan
Chief Operating Officer
600 Main Street, Suite 100
Stroudsburg, PA 18360
Phone: 570-517-3500, Ext. 117
Web: www.stellartechsol.com
Email: jcoogan@stellartechsol.com

Jewish United Fund/Jewish Federation of Metropolitan Chicago
David Rosen
Senior Vice President
Ben Gurion Way
30 S. Wells Street
Chicago, IL 60606
Phone: 321-444-2890
Web: www.juf.org
Email: DavidRosen@juf.org

CoreEnterprise™ provides a web-based, Software as a Service (SaaS) endowment operations system for gift, grant, and transactional processing along with investment management, donor relations information, finance and fund management. JF deployed Stellar’s iPhi Core Enterprise™ system January 1, 2010, followed by the launch of iPhi DonorView™ in November, 2010.

Results
The Federation has been able to fully automate the entire endowment program including all fund types, affiliates, agency endowments and planned giving vehicles. Information exchange with the campaign system (DMS) and the master accounting ledger provides a comprehensive operational solution. Achieving a user friendly online donor experience was critically important. In addition, generating more meaningful donor fund statements and automating donor communications were important components of the solution. “When we started out with Stellar”, explains James Pinkston, JF’s Vice President of Accounting, “we knew the system was very robust in the areas of donor advised funds, charitable gift annuities, integrated transaction processing and the online donor experience. 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
Access to detailed endowment transactional information has increased knowledge and statistical reporting. The end-to-end automation between DMS, Stellar’s iPhi Core Enterprise™ and iPhi DonorView™ has streamlined the endowment operation and maximized staff time. Tracking the trends of donor giving and grantmaking enable staff to match donor interests with specific JUF and JF programs and initiatives. An increasing number of donors access their funds online, manage their favorite charities list and initiate grant recommendations. They enjoy seeing the details of their charitable transactions, knowing when a grant check is processed and receiving/viewing more meaningful fund statements. So far, it appears that there has been a decrease in administrative type donor calls with more of an emphasis now on value added donor communications. The staff are watching this trend carefully and believe it will continue.

“We are especially pleased with the additional and detailed information now gained in the area of grant due diligence and administration,” adds Mr. Rosen. “Another benefit of the software for the donor advised fund program is the use of the taxonomy that we designed to categorize grants from DAFs. This taxonomy allows us to pull reports based on the fields of interest of the organizations to which a donor has given, as well as geography, population served, and whether the organization is a Jewish or secular organization. We use this information to research which donors may be interested in a specific Federation program or project.”

The Future
With the endowment technology infrastructure now in place, Mr. Rosen summarizes the plan. “We are looking to grow our DAF program to over 1,000 funds in 5 years which should also increase contributions and distributions by 20%. Contributions are tied more closely to the economic situation so this percentage is more difficult to estimate. Concurrently, we are encouraging more donors to use the online system to increase operational efficiency and to reallocate staff to more value added donor relations activities.”

Michael Tarnoff, Executive Vice President concludes, “one of our key goals was to use Stellar’s system to manage the full range of JUF/JF endowment funds, donor advised funds, and supporting foundations. We wanted to streamline the accounting process to avoid re-keying, eliminate duplication of data review, optimize accuracy and capture more complete and accurate statistics for reporting.”

“We have been successful so far in doing this,” adds Mr. Tarnoff. “It has taken time and there have been challenges along the way, but we have created a collaborative relationship with our endowment technology partner, Stellar Technology Solutions. We foresee continued collaboration well into the future.”