

Testimonial: Martin Family Foundation

Written by: Cindy Martin Beers, Executive Director



“Prior to using our online system from Foundant, I had to ship six packets with an average of 15-20 applications, each 1-2 inches thick, to three different states. Our online system eliminates all that busy work and allows me to focus on more important matters.” Cindy Martin Beers

<p>Highlighted Results</p>	<ul style="list-style-type: none">• Eliminated costly distribution of application packets to board members distributed across a three state region• Standardized grant application process thereby improving the consistency of applications• Standardized evaluation criteria helping to streamline the decision making process• Increased accountability of board members involved in funding decisions
----------------------------	--

Introduction to Martin Family Foundation

Martin Family Foundation was founded in 2001 and currently employs 2 part-time staff members. We are dedicated to supporting programs that build family values and create assets for communities and concentrate our resources in Montana, Wyoming and Colorado within areas that impact Children, Religion, Education and Health & Human Services.

We wanted a friendly, standardized, efficient grant application process. The paper method was too time-consuming for the applicant and the foundation. Standardizing the procedure was difficult with the paper method. The Foundant software has provided us with an easy-to-use program that accommodates standardized procedures and makes the best use of the applicant’s time while completing the application process.

Challenges

As a part-time employee working out of my home, the time I spend in the office needs to be productive and efficient. Before using Foundant, preparation for board meetings included copying applications, collating, and mailing board packets; all very tedious work. The amount of paper and filing that was required with the “old method” was becoming problematic since the foundation office is in our home and the average grant application required 1 inch of paperwork. Finding the space to file all of this paperwork was becoming a real problem. In addition to the mounting paper trail, it was difficult if not impossible to track applications and grantees. Follow-up at the end of a grant period was a requirement of each grantee, but it was often left up to the grantee to instigate that communication. Follow-up reports that were received were often annual reports that had little to do with the actual funded grant. We also found it challenging to analyze the types and amounts of grants awarded. There was no easy way to track this information that was not labor intensive. Often, this task was not

completed due to the amount of time it took to handle the paper trail and the lack of an efficient method of tracking grants.

Benefits of Grant Lifecycle Manager Implementation

Prior to using Foundant and an electronic application, our applicants received a PDF file of the application that they downloaded and “recreated” on their computer. Once this was complete, they mailed a hard-copy to the foundation office with the required financial statements. Most applications were 1-2 inches thick (including financials). Prior to the board meeting, I had to make 6 copies of each application and mail them to each board member for review since our board is dispersed across 3 different states. At the meeting I provided a brief synopsis of each application prior to our discussion. Often times it was apparent that several board members had not reviewed the applications in their entirety and would base their votes on my synopsis. Discussions were often long and inefficient in part due to questions that may have been answered if members had read the applications. In short, the process was arduous for the applicant, the foundation board and its staff.

Using Foundant Technologies has allowed each board member remote access to the applications so that they may review and evaluate them on their own time. Completing the board evaluations has not only standardized a portion of the review process, it ensures that each board member takes the time to review each application in its entirety prior to the meeting. Discussions during the meeting are more concise, leading to shorter meetings, a happier board and improved staff productivity.

In addition to increased accountability and more efficient board meetings, the time it takes me to prepare for board meetings has decreased dramatically. The paper trail has been reduced which saves our environment and minimizes the amount of storage required in my home office. All of this has occurred while improving the efficiency and integrity of our record keeping. I couldn't be happier with the outcome of adopting the Grant Lifecycle Manager software.

Conclusion

In looking toward the future, we intend to utilize the grant follow-up and report functionalities more regularly. Our intent is to standardize the grant follow-up process so that we can compare “apples to apples” when evaluating the success of a grantee and its programs. This software will also help me track grant follow-ups more easily than the paper method which too often relied on the grantee to send timely reports. In addition to grant follow-up reporting, the ability to quickly review our granting priorities and patterns will provide valuable information to the board as we work to fine-tune our mission and funding priorities. Such reports were almost impossible to produce using the old paper method and are made possible with the use of the Grant Lifecycle Manager.

Working with Foundant has always been easy. The employees are personable and went to great strides to learn about our foundation's needs. Every suggestion that I have made was taken seriously and either integrated into the software or it was explained to me why it wasn't possible. As in any software, the potential to get too technical is very real; Foundant does a great job of minimizing the technical aspect and simplifying explanations yet providing a state of the art computer program that makes the life of an executive director for a small family foundation much more enjoyable. I would recommend Foundant to any small foundation looking for cost-effective, efficient granting software.