

# **Assisting Community Foundations with Technology: Lessons Learned**

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## ***Introduction to Lessons Learned Series***

*Michigan has been intentional about growing community foundations since the late 1980's. Local efforts have been supported by the Council of Michigan Foundations with funding from the W.K. Kellogg Foundation. FERA (Formative Evaluation Research Associates), an independent evaluation group, has documented growth, identified supports and obstacles, and developed lessons learned across multiple statewide initiatives designed to support community foundations. This document is part of a larger set of lessons learned about community foundation growth. To learn more about a conceptual framework and methods for developing lessons learned see Evaluation Overview found in "Introduction" on [www.GrowingCF.org](http://www.GrowingCF.org).*

## **Background**

The Community Foundation Computer Project (1994–2002) had two primary purposes to: 1) strengthen community foundations statewide by providing them access to technology (computers and an integrated piece of software named Foundation Information Management System (FIMS)) designed specifically for community foundations); and 2) increase the Council of Michigan Foundations' (CMF's) capacity to develop and disseminate information resources to the community foundation field.

The Computer Project has provided four major areas of support:

1. Grants and loans were provided to the seven "venture" community foundations that led the computerization effort for upgrading their computers and for the cost of FIMS.
2. Grants and loans to the remaining community foundations. These foundations were eligible to apply for a grant for 66% of the costs of hardware, Microsoft Office®, training, and data conversion as well as a grant for support costs over four years on a declining basis (100%, 75%, 50%, 25%). The cost of FIMS is covered entirely by this grant for participating foundations. Low-interest loans are available to cover the balance of the costs not covered by the grant.
3. Support for providing technical assistance to community foundations. A computer consultant was hired who has provided on-site and on-line help.

4. Enhancing CMF's technological capabilities. This has included: 1) upgrading CMF's computer hardware and software; 2) developing electronically accessible library resources; 3) enhancing CMF's in-house publication capabilities; and 4) developing new information and communication services such as fax on demand, list serves, trainings conducted via conference calls and a Web site. Through the Computer Project CMF now has two scanners (one for images and one for text), a digital camera and computer hardware and software that increasingly will allow them to produce their own publications in house. The Outcomes and Lessons Learned below relate to these enhancements to CMF's technological capabilities.

### **Outcomes for the Council of Michigan Foundations**

Effects of the Computer Project on CMF include increased capacity to deliver technical assistance to the field, provide access to library resources, collect and archive data, and manage the organization's internal affairs. These outcomes are further described below. The Computer Project has:

- ◆ **Strengthened CMF's capacity and capabilities for meeting the information, communication and technical assistance needs of its community foundation members in particular as well as their members at large.** As the community foundation field grows, the number of publications and requests for information has grown with it, as has the volume of training needed by community foundation staff, board members, adult Youth Advisory Committee (YAC) advisors and YAC members. Furthermore, the complexity and level of sophistication as well as the spread between levels of sophistication among community foundations has increased. The nature of requests for information, publications and training has changed. Technology has allowed CMF staff to streamline and expedite routine requests for information and communications to the field so that they have more time to address the new level of requests.
- ◆ **Reduced the time it takes for CMF to respond to members' requests for information.** In the past, when a community foundation needed information or sample forms they would call CMF. Now community foundations can access many documents on CMF's Web site. Other requests can be communicated via e-mail, voice mail or direct telephone calls to the CMF community foundation staff team, who can usually access the needed files electronically and e-mail them directly to the community foundation within 24 hours.
- ◆ **Facilitated efficient interactions among CMF staff in diverse locations.** CMF staff are now located throughout the state. There are CMF offices in Grand Haven and in Detroit. Consultants live and work state-wide and CMF

staff members who work out of the Grand Haven office are often on the road. The Computer Project has greatly facilitated communication and document transfer among staff members and consultants. For example, when CMF's Director for Community Foundation is on the road, she can forward any voice mail or e-mail requests she receives to another staff member so that they can be responded to without delay. One staff member commented "We are getting better at streamlining work in the office...We now have a seamless process, driven by technology."

- ◆ **Increased staff capacity to respond to members' needs.** One interviewee commented, "Before I had an old computer and could open only one application at a time. Now I can have the four I need open simultaneously. It has cut my time in half."
- ◆ **Provided the ability to meet the growing needs for information.** As the community foundation field grows the requests for information are becoming increasingly more complex and sophisticated as well as more numerous. For example, program officers are debating issues related to grantmaking and have requested information from CMF that required the librarian to research materials that were not available in the CMF library. She has the time available to do so because she no longer needs to spend as much time processing the routine requests for information. In addition, CMF receives and administers increasing numbers of grants. Each of these grants requires some level of reporting. One CMF staff person commented, "The questions asked by our funders are becoming increasingly more complex and sophisticated."
- ◆ **Facilitated CMF's relationship with its members.** The Computer Project has greatly facilitated communication and information exchange with the community foundation field. All community foundations benefit from the information and publications available through CMF. Community foundations use the new communications capabilities to greater and lesser degrees. For example, some make regular use of e-mail through the Internet to communicate with CMF staff; others do not.
- ◆ **Increased efficiency and lowered publication costs.** Intermediaries have been eliminated from the draft stages of CMF's document production. For example, the Michigan Scene used to go from the writer to the printer to be laid out. This process took a month. Then it came back to be proofed. Corrections were made at the printers and an additional proof was done by CMF. Then a final document was prepared. Costs were incurred and time spent for each of these steps. Now print-ready text is sent on a disk to the printer.

Having an image scanner and being able to scan photographs directly into a publication has also reduced the number of steps from draft to finished product and has reduced publication costs. Publications that are being re-published from other sources can be scanned in and formatted instead of being

re-typed. CMF publications, tools and other resource documents are now available in PDF format on their Web site, and can be downloaded ([www.cmif.org](http://www.cmif.org)).

Photographs are now easier to access and use. Before the Computer Project began CMF's photographs were stored in a box. Now, photographs can be downloaded from the digital camera into computer files that can be searched and sorted by events or individuals. CMF hopes to scan all their existing photographs so that they will all be easily accessible in the future.

- ◆ **Increased ability to provide access to library resources.** When the Computer Project began none of CMF's library resources were available electronically. Now all of the key library resources (with the exception of videos and cassettes) have been scanned into an electronic form. A careful "weeding" of the materials was done to ensure that only useful, up-to-date, or important historical documents are in the library. The entire collection can be researched through an electronic card catalogue which can be found on CMF's Web site. Many handouts and sample documents can now be downloaded directly from CMF's Web site. Others are in CMF's "electronic library" and can be e-mailed.
- ◆ **Increased capacity to deliver technical assistance.** When this project began, CMF provided conferences and workshops, on-site consulting, telephone consultations and access to library resources and sample documents. The range of methods for offering technical assistance to the field has increased. Conference calls, listservs, and a Web site have been added to the other forms of technical assistance offered.
- ◆ **Increased capacity for state-wide data collection and research.** Community foundations are now able to complete the community foundation annual survey on-line, and CMF is developing standard FIMS reports to capture some of the financial data being collected state-wide. CMFs' ability to collect, analyze and report state-wide data benefits community foundations because it helps them understand where they fit into a larger picture. CMF uses this data for planning purposes and to strengthen the services they provide to the field.
- ◆ **Communication between CMF and its members as well as among community foundations has changed from being primarily unidirectional to being multidirectional.** Before the Computer Project started CMF relied on telephone calls and then a fax-broadcast system to communicate with members. Packets of information were mailed out periodically to members. Listservs have facilitated the movement of information.

## **Lessons Learned**

These lessons were learned from multiple initiatives, over multiple years. FERA conducted interviews with CMF's entire staff, focused specifically on the issue of technology in their support organization. CMF and FERA staff interpreted the survey

and interview data from the entire field and developed lessons learned based on the findings. This process occurred more intensively during the Computer Project implementation years but has continued within the context of other initiatives that depend on technology. For more information, see *Community Foundation Administration and Finance: Lessons Learned About Technology* in “Strengthening Existing Community Foundations” on [www.GrowingCF.org](http://www.GrowingCF.org).

**Build support organizations’ capacity to use technology.** If community foundations’ growth is being stimulated, support organizations need parallel capacity building efforts so that they can keep up with the increasing demands for their services. The Computer Project was successful in supporting capacity building for CMF and its staff. Without the enhanced technology, CMF staff would not have been able to keep up with the increase in numbers, complexity and sophistication of the field’s information needs.

**Invest in technology to enhance a support organization’s capacity to deliver technical assistance to community foundations.** Technical assistance delivery methods have changed as a result of the Computer Project. Community foundation CEO’s and program officers are now networked through listservs. Resources including publications, issues papers, practical tools, and sample documents are posted on CMF’s Web site so that they are accessible. Customizable tools, developed at the state level, are sent to community foundations on CD-ROM. Because this is a state-wide effort no community foundation is left out of the information loop.

**Invest in on-going technology technical assistance.** Staff turnover and differing levels of familiarity with technology make on-going technical assistance critically important. Community foundations have needed help with a wide range of tasks and issues over the years. Having a computer consultant available who understood computers as well as community foundation accounting and FIMS was very valuable.

**Involve a wide range of community foundations in designing a technology support project.** If an initiative is intended to benefit the entire community foundation field, then all sizes of community foundations must be involved at conceptualization and design, implementation and evaluation phases of the project. Small community

foundations did not become involved in the Computer Project until its implementation phase. As a result, the Computer Project's original design had to be changed to meet their needs.

**Balance standardization with community foundations' desire to customize software to meet their specific needs.** FIMS has created standardization of accounting practices, donor tracking and reporting while allowing community foundations to maintain their widely diverse financial operating systems and to customize FIMS to meet their unique needs.

**Provide on-going training opportunities for FIMS users.** It takes six months to a year to train a person in the community foundation accounting field and in FIMS. Trainings need to be on-going, multi-level and hands-on. Because the software is community foundation-specific, training is not available at the local level. A support organization has an important role to play in facilitating this training.

**Educate board members about the value of technology.** Some community foundations may need assistance in educating their boards about the uses and benefits of new technology as well as its potential obstacles and pitfalls to its effective use, so that they can make more informed decisions.

**Create a feedback loop.** It is important to have an on-going feedback loop, as this project did, among community foundations and technical assistance providers (CMF and NPO-FIMS software provider) and to clarify roles and responsibilities for providing technical assistance early in the project.

**Develop efficiencies of scale.** Smaller community foundations (assets under \$5 million) cannot afford to purchase and maintain FIMS. CMF helped to establish FIMS hubs. Lead community foundations serve as hubs and provide services to smaller foundations. CMF also researched and evaluated options for smaller community foundations. Other options included: Community Pearl® and Excel® spreadsheets that CMF designed specifically for community foundation accounting.