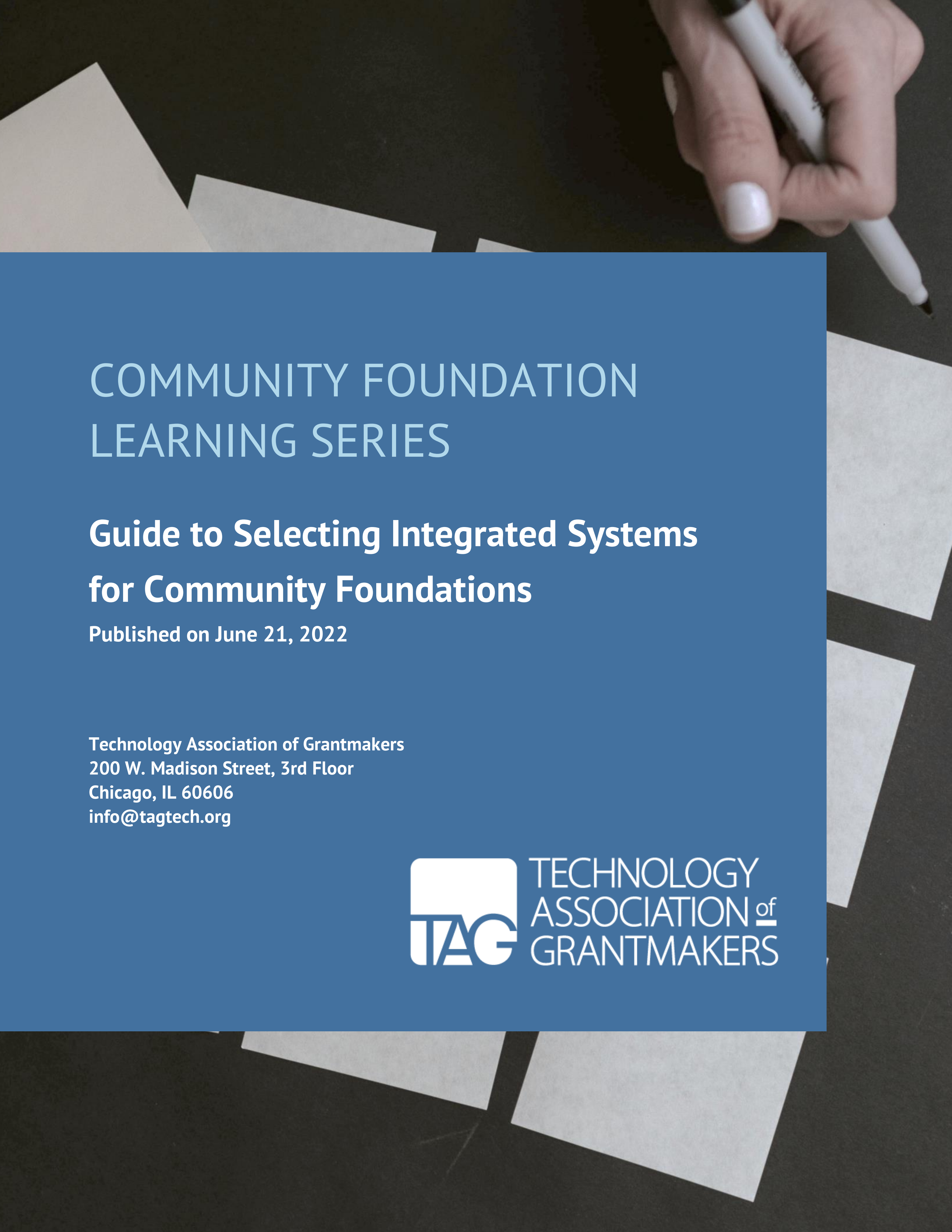

COMMUNITY FOUNDATION LEARNING SERIES

Guide to Selecting Integrated Systems for Community Foundations

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OVERVIEW

This guide is meant to help you as a community foundation leader navigate the challenges around selecting and implementing a suite of technology systems that integrate to meet the unique needs of your organization. This process often includes identifying the key needs of all stakeholders, recognizing the key challenges around selecting both the appropriate and interoperable tools for your organization's core needs, understanding how to best prioritize those needs, as well as preparing for a successful selection and implementation process. To aid you in this process, this guide also includes multiple case studies provided by peer foundations on page 8 as well as "tech stack" profiles of over 50 community foundations on page 25.

This guide is provided by the Technology Association of Grantmakers (TAG) as a companion to the *Landscape of Integrated Systems for Community Foundations* which provides an overview of available systems at www.tagtech.org/communityfoundationsystems.

KEY CHALLENGES FOR COMMUNITY FOUNDATIONS

Community foundations have some of the most complex technology needs of all nonprofits. In addition to requiring robust versions of the general CRM and ERP/Accounting systems used by the entire social sector, community foundations also require systems to support several other specialized process areas. For example, many community foundations rely upon systems to support fundraising and donor management, grants management, scholarships, fiscally sponsored and collective giving projects, fund accounting, and multiple end-user external portals.

KEY CHALLENGES

- High complexity and many diverse needs
- Large number of stakeholders with competing interests
- Small market of solutions with fewer options
- Less professional support available

As the technology executive or sponsor leading a software selection process within the community foundation context, you are asked to meet the needs of a diverse group of stakeholders, including internal functional teams such as Fundraising, Accounting, Grants Management, and Investing. Moreover, you are often asked to consider the needs of your Board as well as multiple external stakeholders including grantees, individual and institutional donors, collaborating organizations, account holders, and community groups to name just a few. These needs are often competing and require thoughtful management. As you'll learn in Selection Strategies on page 425, many technology leaders choose to center their selection on a "core" system as a way of prioritizing needs and navigating competing interests.

An additional challenge for community foundations is the limited number of purpose-built solutions. Because the number of community foundations is relatively small, the marketplace for solutions targeting your specific needs is smaller and less mature than for other types of philanthropic organizations. Moreover, the number of consultants and professional service organizations familiar with community foundation needs is also limited. This leaves community foundations with fewer options and less support than they deserve and often need.

Successful community foundations navigate this challenging landscape by developing a selection strategy fit for their needs, their budget, and the tolerance for custom development.

TECHNOLOGY SELECTION STRATEGIES

When selecting systems, a reasonable high-level process should include the following elements:

1. **Appetite for Complexity:** Consider your organization's appetite for integrating, operating, managing, and supporting multiple systems. This will help you decide whether you should lean toward a single multi-function integrated system or are able to explore developing a custom solution that integrates separate best-in-breed systems.

2. **Start at Your Core:** Look at available solutions first through the lens of the two core/fundamental business process areas: CRM and Accounting. Once you have an idea for which vendors might meet your needs in these areas, you will have a better sense of which combination of options might work for your overall needs.

3. **Identify Unique Needs:** Identify the more specialized process areas (fundraising, grantmaking, scholarships, fiscal sponsorship) that are most integral to the operations of your organization. It's very unlikely you will find a solution which excels in each of these areas, so identifying the relative priority among them will help when evaluating available options. Following are the six most common types of systems needed for community foundations:
    a. Accounting
    b. Constituent Relationship Management (CRM)
    c. Donor Portal
    d. Grants Management
    e. Scholarships
    f. Business Intelligence

" If you are a community foundation, nothing will actually meet all of your needs and wants, you need to decide what compromises are acceptable and how much or your resources you are willing to divert from the community to make the systems work."

Andrew Halpryn
Information Technology Officer
Hartford Foundation for Public Giving

Read the case study on page 13.

4. **Implementation Capacity and Support:** Even with support from vendors providing implementation services, you will need a lot of additional capacity for project management, change management, quality assurance, and other areas. Whether you dedicate that capacity in-house or find a consultant to work with, the amount of time and degree of skill you can provide will play a role in your ability to successfully implement certain solutions.

5. **Meeting Secondary Requirements:** After the needs of your core functions have been addressed, evaluate the different options for each of your remaining requirements and/or process areas, keeping in mind the work you've done to identify your tolerance for complexity/integration, the degree to which those systems will work together with your preferred CRM/Accounting options, the relative priority of each area within your operations, and the available capacity to lead and manage your implementation.

Quick Tips for Selecting Systems & Consultants

Selecting systems requires prioritization and compromise. Below is a summary of suggestions for selecting both systems and consultants to aid your process.

	Small Foundations	**Mid-Sized Foundations**	**Large Foundations**
Selecting Systems	Review multi-function solutions as the preferred option to reduce complexity and integration.	Consider your organization's appetite for integration, then choose a preference for either multi-function systems (with less integration) or more specialized systems (with more integration)	Focus on ERP and CRM selection first, then add vendors and integration as needed to complete the solution.
Selecting Consultants	Consider outsourcing the management of the entire process to an external consultant.	If you have strong internal project management capacity, you can lead the project internally, but a consultant would still be valuable. If not, then a consultant to manage the overall process is likely necessary.	Either dedicate at least 0.5 FTE staff time or select a consultant to oversee the overall process. Then select individual implementation and integration partners for different systems.

Key Trends in System Selection

In March 2022, over 50 community foundations throughout North America shared a profile of their core technology systems with the Technology Association of Grantmakers (TAG), noting any future replacement systems where relevant. The tool stack survey reveals the following selection trends among community foundations:

- **Small foundations** (<$250M in assets) tend to adopt "all-in-one" systems.
- **Mid-sized foundations** ($250M-$1B in assets) tend to select the "core" elements of their technology stack first and make decisions about other components based on those. This segment seems to have the least certainty regarding options for the future.
- **Large foundations** (over $1B in assets) tend to choose a mix of multiple best-in-breed options, leaning toward enterprise-class systems supporting CRM and ERP/Accounting.

Explore further by reviewing the complete list of tool stack peer profiles on page 25.

IMPLEMENTATION STRATEGIES

While it may feel like a lot of effort, selecting the systems for your new technology stack will actually require much less effort on your part than the actual implementation process. The vendors of the systems you select will likely provide or at least arrange for professional services to do the hands-on work of implementing their systems. However, the overall process still requires a noticeable amount of effort on your foundation's behalf as well. This includes:

- **High-Level Management:** Timeline planning across vendors, budgeting, managing relationships with vendors.

- **Project Management:** Managing the ongoing participation of your staff in the implementation process as well as overseeing vendor work and deliverables.

- **Requirements Gathering:** Ongoing discussions regarding details required for each of your business process, permissions and security, user experience, system outputs and integrations.

- **Change Management:** Reviewing and meeting stakeholder needs, developing internal champions, ongoing communications with staff and external parties, and iterative opportunities to share project progress.

- **Data Migration:** Planning, mapping data structures between systems, data clean-up and retention decisions, and hands-on execution when product vendors are unable to support you.

- **System Integrations:** Planning, aligning requirements and project plans, and possibly finding third-party vendors for execution when system vendors can't accommodate custom integration work.

- **Training and Documentation:** Identifying all end-user training needs, creating materials, communicating training participation requirements for staff, and delivering training and support beyond what individual vendors can provide that is specific to your business needs.

The effort for each of these areas may come from a combination of places, but establishing an Implementation Team or Committee within your organization that includes people who will act as the driving force, are empowered to make decisions, and can help to socialize changes will greatly increase your project health. If additional resources are needed to manage the overall project and help facilitate and focus staff efforts, you should consider finding a consultant or other partner to address these needs.

In reality, systems implementation efforts are lengthy and complex but well-worth the investment when executed with foresight and stakeholder engagement.

Learn how three community foundations successfully upgraded their technology systems in the Case Studies on the pages that follow.

"REAL WORLD" IMPLEMENTATION TIPS

1. If you have no one with project management experience, hire someone, if you can. And hire them early.
2. Know what the primary drivers are for the software change.
3. Identify "champions" within the organization.
4. Don't underestimate the amount of change management support needed.
5. Avoid customization of the new software!

Jennifer Windram
Technology Operations Manager
Berkshire Taconic Community Foundation

Read the case study on page 9.

CASE STUDIES

The reality of system selection and implementation for community foundations is complex, nuanced, and often untidy.

To aid you in your exploration, this guide presents four case studies generously provided by peer foundations.

"Consider investing in a proof of concept prior to committing."

Nikhil Sawant
VP of Business Services & Chief Information Officer
Foundation For The Carolinas

Read the case study on page 22.

Berkshire Taconic Community Foundation	Hartford Foundation for Public Giving	Arizona Community Foundation	Foundation For The Carolinas
Asset Size: $214M **Org Size:** 20 FTE **IT Team Size:** 1 Tech Operations Manager, plus consultants	**Asset Size:** $1B **Org Size:** 60-65 FTE **IT Team Size:** 2 FTE, plus limited project consultants	**Asset Size:** $1.3B **Org Size:** 75 FTE **IT Team Size:** 5 FTE, limited use of consultants	**Asset Size:** $3.4B **Org Size:** 105 FTE **IT Team Size:** 8 FTE, plus consultants
See page 9	**See page 13**	**See page 15**	**See page 22**

Case Study: **Berkshire Taconic Community Foundation**

Asset Size: $214M
Org Size: 20 FTE
IT Team Size: 1 Tech Operations Manager, plus technology support through a managed-service provider (MSP)

Old Tool Stack	New Tool Stack	Comparable Peer Tool Stack*
CRM: Blackbaud's FIMS **Donor Portal:** Blackbaud's Donor Central **GMS:** Foundant GLM **Accounting:** Blackbaud's FIMS **Scholarships:** Foundant SLM **Business Intelligence:** none (Crystal Reports for FIMS)	**CRM:** Foundant CSuite **Donor Portal:** Foundant's Donor Portal **GMS:** Foundant GLM **Accounting:** Foundant CSuite **Scholarships:** Foundant SLM **Business Intelligence:** Reporting out of Csuite and Excel	**CRM:** Stellar iPhiCore Enterprise **Donor Portal:** Stellar DonorView **GMS:** Stellar iPhiCore Enterprise & GranteeView **Accounting:** Stellar iPhiCore Enterprise **Scholarships:** Stellar iPhiCore Enterprise & ScholarView **Business Intelligence:** Excel/Tableau

*View a complete list of peer tool stacks beginning on page 25.

What prompted the need for your IT systems upgrade?

The organization has been on Blackbaud's FIMS (on-prem software) since 1998. Most staff avoided the software, there was not CRM solution and it didn't integrate well with our grants and scholarship software. As Blackbaud had discussed sunsetting FIMS, we saw it as a time to move to a newer system.

What were your priorities in finding replacement systems? Were there key stakeholder(s) driving your decisions?

We need to move to a more modern system that could handle our transaction volume and processes in a more efficient way, provide improved CRM functionality, with a high-quality of support and product development. We were already using Foundant's GLM and SLM software, so we wanted that integration across all of the modules. From an IT perspective, we preferred a cloud solution that would enable us to eliminate our local server and the need for a remote desktop connection.

Our evaluation team was made up of a selection of employees who process transactions and their managers.

What did you select as the core or foundation for your new operational system? (e.g., CRM or GMS or Accounting or something else)

Accounting/CRM

What was a primary driver for your selection?

☐ Flexibility to customize and expand
☐ Ease of use, out of the box
☒ **Data integration between functionality areas** – While there wasn't a single driver, data integration was very important to us. We were already using Foundant's GLM and SLM, so the integration with Csuite was valuable.
☐ Cost
☒ **Other** – The ability to deliver a successful conversion and provide ongoing high-quality support were important criteria, as well.

What did implementation look like for your organization? For example, how did you handle data migration, process re-engineering, user requirements and testing, training and onboarding users and donors?

During contract negotiations, we searched for and found an IT Project Manager to manage the conversion process. One of the first tasks for the PM was to map our current processes so that there was alignment on existing processes that we could improve upon with the new software.

Foundant's conversion process was spread out over 3 months. As they were migrating to a new implementation team structure, it took a few weeks to get the right staff assigned to our account. We started with weekly data and discovery meetings and then moved into weekly 2-hour training sessions. Prior to each training session, the team completed an online guided course in our sandbox environment. Due to timing and some rescheduled trainings, we made the decision to extend our pre-migration timeline out a month, which allowed us to do more testing, system set-up and get additional training in areas that we needed it.

Data migration from FIMS to CSuite was very easy. We spent a few days without any data processing, in order to finalize the system set-up and do some data clean-up, but then started parallel processing—entering our transactions in both CSuite and FIMS.

We chose not to do a lot of data clean-up in FIMS, because of the ease of bulk editing in CSuite, but it did mean we had a lot of clean-up work to do right after we migrated over. We spent several days on merging duplicate profiles, with all project team members focused only on that task. We still have more to go, but it did get us off to a good start.

We chose to launch the donation and donor portal several weeks after our go-live with Csuite, which allowed us to get used to the system before we layered on end-user support. We provided communications to our Fund Advisors and a How-To Guide and the launch of the site went smoothly.

We ended up running parallel for about 3 weeks – entering data both in FIMS and in the Foundant Databases. While this involved extra work, it helped our staff team verify settings, transactions and confirm that we understood and were satisfied with the way data was acting in the new system.We are now only processing in CSuite, and are beginning the broader tasks of staff training, clarifying roles and responsibilities and learning the ins and outs of reporting and other features

How did you accomplish an integrated solution in your new tool stack? Are there integration tools or custom code you've leveraged to ensure data and processes flow between systems? Are there any areas where you will rely upon manual effort?

Since we were already using Foundant GLM and SLM, the integration with those systems will be seamless. Data from FIMS to Csuite is easily transferred and the Foundant team have a lot of experience converting from FIMS. We have not had to use any integration tools or custom code, nor do we plan to.

Are there any key partners or vendors you'd like to note here?

As I stated above, after a bit of a rough start, the Foundant team that we have ended up with has been a huge help to not only educate and train us, but also to provide guidance and best practices for foundations such as ours.

What lies ahead on your future roadmap?

We would very much like to work on electronic document handling and storage to start to wean the foundation off of paper. We are also looking into better technology to support remote working (ie: soft phone technology, better equipment, etc.)

What advice would you share with a decision-maker faced with a similar effort?

1. **If there is no one within the organization with project management experience, hire someone**, if you can. And hire that person early in the process—before you do any RFPs. That person can assist to identify the organization's requirements before the software evaluations, so that you are sure that you are choosing the right system for all of your users, and then can lead the organization through the conversion seamlessly.
2. **Make sure that you know what the primary drivers are for the software change.** You will not likely find a system that fits all of your requirements, but if you know your priorities, then you can find something that becomes the best fit.
3. **Make sure you identify "champions" within the organization**—those people who are tasked with maintaining excitement and a positive outlook about the new system. Major software conversions cause a lot of anxiety, even amongst those who think they are ready for it. Having a few people who can help manage each other's anxieties and who will be the new system "cheerleaders" will help the team a lot.
4. **Don't underestimate the amount of change management support that you will need.** If you can find someone to just focus on the change management within the organization (or have a project manager that can do both), use them. Any software change will mean a big adjustment

across the organization and the better that you tackle the mental and procedural changes that result, the more successful your adoption will be.

5. **Avoid customization of the new software!** This may mean having to fight against the “that is how we always do it” mentality at every turn. But customizing new software is fighting against it, rather than letting the system do the work for you. There may be places where it is unavoidable, but that should be very few. If you are customizing a lot, then you may want to rethink the software selection.

Case Study: **Hartford Foundation for Public Giving**

Asset Size: $1B
Org Size: 60-65 FTE
IT Team Size: 2 FTE, plus limited project consultants

Old Tool Stack	New Tool Stack	Comparable Peer Tool Stack*
CRM: FIMS	**CRM:** Foundant CSuite	**CRM:** Salesforce
Donor Portal: Custom	**Donor Portal:** Foundant CSuite	**Donor Portal:** Salesforce Communities
GMS: IGAM	**GMS:** Foundant GLM	**GMS:** SmartSimple
Accounting: FIMS	**Accounting:** Foundant CSuite	**Accounting:** FoundationPower
Scholarships: FIMS/Scholarship America	**Scholarships:** Foundant SLM	**Scholarships:** SmartSimple
Business Intelligence: NA	**Business Intelligence:** N/A	**Business Intelligence:** Salesforce

*View a complete list of peer tool stacks beginning on page 25.

What prompted the need for your IT systems upgrade?

FIMS was antiquated/limited and looking like it had an end of life coming sooner rather than later. IGAM was very limited. We did not like the FIMS donor portal and our custom portal was nearing its end of life. Customer service at vendor was not at an acceptable level.

What were your priorities in finding replacement systems? Were there key stakeholder(s) driving your decisions?

All functional areas were included in the search for a replacement and prioritization of needs. We prioritized data integration and vendor support and were willing to accept a system that met all our basic functional needs. The integration and support were a higher priority than functional wants.

What did you select as the core or foundation for your new operational system? (e.g., CRM or GMS or Accounting or something else)

Based on the above priorities we wanted to find a system from a single vendor that met all or most of our operational needs. If we hadn't found an acceptable single vendor solution we would have begun assembling 'best in breed' solutions from multiple vendors.

What was a primary driver for your selection?

- ☐ Flexibility to customize and expand
- ☐ Ease of use, out of the box
- ☒ **Data integration between functionality areas**

☐ Cost
☐ Other

What did implementation look like for your organization? For example, how did you handle data migration, process re-engineering, user requirements and testing, training and onboarding users and donors?

The most important aspect of migration was that we had top level support to rework all internal processes. Shorthand was: the "what" stays the same but the “how” is up for grabs. All data was migrated. It was a six-month process from signing a contract to the Foundant suite becoming our system of record. The first four months were a back and forth between training and data clean up as one informed the other. Test migrations were done followed by a final migration, the old system was frozen for a week to verify correct data migration and then two months of finalizing processes and running dual systems. Training was focused on core users at the outset and then expanded to the entire staff after the data migration so it could include our data and some of our new processes.

How did you accomplish an integrated solution in your new tool stack? Are there integration tools or custom code you've leveraged to ensure data and processes flow between systems? Are there any areas where you will rely upon manual effort?

N/A single vendor

Are there any key partners or vendors you'd like to note here?

Foundant was able to be both a project manager and supply of temporary labor in addition to their role as vendor.

What lies ahead on your future roadmap?

Changes in leadership, board priorities, and the pandemic have us refocusing much of our work. We are still determining what the new Hartford Foundation will look like, and the new system is seems to be working well enough that we expect it will support our needs for the foreseeable future.

What advice would you share with a decision-maker faced with a similar effort?

If you are a community foundation, nothing will actually meet all of your needs and wants, you need to decide what compromises are acceptable and how much or your resources you are willing to divert from the community to make the systems work.

Case Study: **Arizona Community Foundation**

Asset Size: $1.3B
Org Size: 75 FTE
IT Team Size: 5 FTE, limited use of consultants

Old Tool Stack	New Tool Stack	Comparable Peer Tool Stack*
CRM: FIMS-CRM **Donor Portal:** DonorFirst **GMS:** FIMS and gGrants **Accounting:** FIMS **Scholarships:** AcademicWorks **Business Intelligence:** NA	**CRM:** Salesforce NPSP **Donor Portal:** Salesforce Community Plus **GMS:** Foundant GLM **Accounting:** Sage Intacct **Scholarships:** Foundant SLM **Business Intelligence:** Salesforce Dashboards **Data Integration:** Workato	**CRM:** Blackbaud RENXT **Donor Portal:** FidTech DonorSphere **GMS:** SmartSimple **Accounting:** FidTech PGFundConnection **Scholarships:** NextGen Scholarship Manager **Business Intelligence:** PowerBI

*View a complete list of peer tool stacks beginning on page 25.

What prompted the need for your IT systems upgrade?

Our top strategic initiative was first and foremost to replace FIMS due to its many shortcomings (lack of functionality, poor vendor support, cumbersome processes, weak data validation, many limitations which caused us to have a lot of manual workarounds, and extreme risk of erroneous payment processing). We also experienced many of the same issues with our competitive grants system (gGrants), so we considered that replacement to be more strategic.

But we needed to temper our strategic priorities with some vendor-inflicted tactical constraints. Our BoardMax system was not going to be available from the vendor after 3/31/2020 and our donor portal would not be available from the vendor after 6/30/2020.

What were your priorities in finding replacement systems? Were there key stakeholder(s) driving your decisions?

Our priorities included:

- Implement new systems in time to avoid the vendor decommissioning dates described above.
- New systems to be externally hosted (i.e. “cloud” hosted)
- Select “best of breed” systems from a minimum number of well-established vendors
- Select systems that offered significant customization and integration capabilities

Arizona Community Foundation's values include collaboration and inclusion. The core team to plan and manage our systems and technology upgrade included our CFO, CTO and VP Systems and Integration. Other members of our executive and managements teams were included as we focused on their relevent systems.

What did you select as the core or foundation for your new operational system? (e.g., CRM or GMS or Accounting or something else)

We selected a pair of systems which became the foundation of our new systems architecture. Salesforce with the Nonprofit Success Pack was selected as the primary system to support most departments and staff. This includes contact management, information about donors, opportunities, funds, grantees, a growing number of operational workflows, reporting and dashboards. Sage Intacct was selected as our general ledger and fund bookkeeping and accounting system.

What was a primary driver for your selection?

- ☒ **Flexibility to customize and expand**
- ☐ Ease of use, out of the box
- ☐ Data integration between functionality areas
- ☐ Cost
- ☐ Other

What did implementation look like for your organization?

First, we selected Diligent's BoardEffect system to replace BoardMax. The BoardEffect conversion/migration and production rollout were performed in parallel with planning for our strategic initiatives along with replacement of our donor portal. Our biggest concern was timing — to get the donor portal replacement completed and successfully rolled out prior June 30, 2020 when the vendor would terminate access to our legacy portal.

After a false start, we finally decided to adopt a "best of breed" approach to system replacement rather than utilizing one of the very few ERP-like systems available to community foundations. We selected Salesforce with the Non-Profit Success Pack (NPSP) as our CRM and also as the foundation of our operational system, data repository and for operational and historical reporting. With timing as a major driver, we quickly decided to utilize Salesforce Community Plus as the basis for our new donor portal. This had several advantages, especially that Community Plus shares the data repository with Salesforce NPSP and that it was our good fortune to have a world-class Salesforce architect/developer/administrator who had very recently joined our IT team.

While we started work migrating data from FIMS and FIMS-CRM to a new Salesforce NPSP instance, we also started evaluating leading cloud-hosted bookkeeping and accounting solutions to replace those FIMS functions.

Once we successfully migrated all required data from FIMS and FIMS-CRM to Salesforce NPSP, we next implemented data synchronization between FIMS and Salesforce through a nightly export-import process. This was necessary because we were still using FIMS as our system of record and for all our transaction processing. Now that we had our data available in Salesforce NPSP we could start developing our new donor portal with Salesforce Community Plus. This was a 90-day crunch effort and we completed the implementation and with amazing help from all hands in our Development, Brand & Impact (marketing), Finance, and Admin Services teams we successfully started production with the new donor portal (ACF Connect) on 6/15/2020. Our new donor portal and Salesforce NPSP have been integrated with GuideStar (Candid) which benefits both donors who want to make online grant decisions and our internal staff who process grants.

Immediately after completing the new donor portal effort we focused on developing support in Salesforce NPSP for non-competitive grants. During July-August, 2020 we migrated non-competitive grants processing from FIMS to Salesforce NPSP.

Also following our June, 2020 donor portal implementation and roll-out we made the decision to utilize Sage Intacct as our bookkeeping and accounting system. We also decided to work with an experienced consulting organization to guide and support our migration from FIMS to Intacct. We selected Clark Nuber PS, based in Bellevue, WA. Planning for the configuration of and migration to Intacct started immediately after these decisions were made.

And also in summer 2020 we selected Foundant’s Grant Lifecycle Manager (GLM) system to replace our legacy competitive grants system and work started on the migration in July, 2020. We chose to pay for Foundant’s Jump Start service to create most of our grant applications as part of the migration project. The ACF IT team extracted and exported all our current and historical data from our legacy gGrants system and we paid an additional fee to Foundant for their assistance in cleansing and importing our data into GLM. This project was very successful and we completed the project on schedule.

During the second half of 2020 we focused on the following parallel initiatives:

- Developing support in Salesforce NPSP for non-competitive grants and migrating this process off FIMS
- Converting historical financial data from FIMS to Sage Intacct. We decided to convert ALL our detailed gift, grant and financial transactional data from FIMS to Sage Intacct, over concerns expressed by a few consultants. In all, we converted 26 years of historical data. Now that we have successfully completed the data conversion, we consider this effort and the resulting complete financial and transactional history in Sage Intacct to be a major advantage that we will benefit from going forward.
- Conversion and migration to Foundant’s GLM for competitive grants
- Migration of additional transaction processing and functionality and queries and reports from FIMS to Salesforce NPSP. This especially included data entry for creation and maintenance of profile information for donors, grantees, and funds.

As we created the detailed design for our future use of Sage Intacct, we encountered four fund-related issues where Intacct could not support our requirements:

1. **Fee assessments** - Sage agreed to develop support to satisfy our requirements for fee assessments and to support this custom program code as a standard capability they can offer to other CF customers if needed. We paid an additional fee for this development effort.
2. **Fund allocations/pool apportionment** - Clark Nuber agreed to develop a process we use to satisfy our requirements. We paid consulting fees for this development effort.
3. **Fund asset rebalancing** - ACF IT developed the program code in Salesforce to perform the calculations our CFO designed.
4. **Data object to store fund information** - We were advised by Sage and Clark Nuber that there were two Intacct data objects that could potentially be used to store fund information: Entities and Locations. We chose to use the Entity data object. However, Sage had designed Entities to support organizational units and their pricing model would have required us to pay an exorbitant annual fee for almost 1900 funds (now over 2000). To address this issue, Sage waived their fees for the Entity data objects we utilize for funds.

As we started experimenting and testing the integration between Sage Intacct and Salesforce, we quickly realized that we needed more flexibility, control and functionality than the minimal "out of the box" integration provided by Sage Intacct. We selected Workato as our work flow/data integration tool and we remain satisfied with this decision. We started with 3-4 work flows (Workato calls these "recipes") and we are now using seven in production.

The other major decision we made regarding our conversion to Sage Intacct was the timing of the conversion. We elected to convert as of the start of our fiscal year (April 1). In hindsight, we may have been better off to convert mid-fiscal year, perhaps after our annual audit was completed. Nonetheless, we went live in production with Sage Intacct as of 4/1/2021.

Our migration to Foundant GLM for competitive grants went live in production in January, 2021.

Following the FIMS and competitive grants migrations, we then focused on the following initiatives starting 1Q-2021 and continuing throughout the year:

- Migration of our scholarships team from AcademicWorks to Foundant's Scholarship Lifecycle Manager (SLM) system. Similar to our success with GLM for competitive grants, we hired Foundant through their Jump Start offering to create most of our initial online applications and we partnered with Foundant on data cleansing and import. Our IT Team performed the data extracts/exports from AcademicWorks. Our migration to SLM for scholarships went live in production in December, 2021.
- Enhancements to our ACF Connect donor portal (based on Salesforce Community Plus). This went live in production in October, 2021.

- Automation of Gift and Grant acknowledgement letters, which has resulted in service improvements, greatly reduced error rates, and labor savings.
- A significant data cleanup initiative was performed. We processed and standardized all contact addresses in our data repository for donors, grantees and professional advisors. We also identified and consolidated duplicate profiles and contacts. This cleanup would have been extremely difficult in FIMS It was significantly more efficient to do this with the data tools available in Salesforce. (As an aside, another conversion planning topic is to decide how much data cleanup to do pre-conversion and post-conversion. Based on our experience, we advise doing as little as possible pre-conversion since newer systems support much more efficient data access and manipulation tools and functionality).
- Integration of DocuSign with Salesforce for required document signatures. Salesforce generates the document(s) for signature, initiates the DocuSign request and communication with the document signer, receives the alert that the document has been executed, and stores the signed document in our repository. So far we have only implemented this support for a couple of use cases, but we have identified approximately 25 additional use cases where we plan to utilize DocuSign-Salesforce integration/automation).
- Migration of Wrike work flows to Salesforce on an opportunity basis using Salesforce Flows, Tasks and Cases. We do not have a stated goal of eventually eliminating the use of Wrike entirely, but I won't be disappointed if we someday achieve this.

One of the most valuable things we have developed are a set of Salesforce dashboards to highlight metrics and summary information of interest. When we started this design and development effort we agreed that our success indicator would be if we could create an executive dashboard valuable enough that our CEO, Steve Seleznow, would want to look at it at the start of every day. We achieved success and now Steve even uses his dashboard in Board of Directors status presentations. We have created dashboards for each of our executives and their teams and try to be responsive accommodating their enhancement suggestions and requests.

How did you accomplish an integrated solution in your new tool stack?

In terms of integration between Foundant GLM & SLM and our Salesforce products, we are currently just using data export-input to copy data from Foundant GLM/SLM into Salesforce. Almost two years ago we looked at the GLM APIs provided by Foundant and we didn't see any real advantage to using them over export-import. However, we think Foundant may have developed API enhancements over the past two years and we are going to reconsider using the APIs in the future.

We heard rumors that Foundant has an active initiative for CSuite to support Workato (our workflow/data integration tool of choice) as a future integration capability. We reached out to Foundant and discussed our interest in possibly collaborating on business requirements and design for future Workato APIs for their GLM (grants) and SLM (scholarships) systems. Foundant has responded with interest and we have a discussion scheduled with their team.

Regarding integration between Clearwater Analytics, Salesforce, and Intacct, we are building this in two phases:

- **Phase One**: Integrating Clearwater's daily investment reconciliation and monthly reporting. We will receive a data export from Clearwater after month-end and import this data into Sage Intacct for investment pool apportionment. After pool apportionment has completed in Intacct, our Workato integration will detect and migrate the pool apportionment data from Intacct to Salesforce within four hours.

- **Phase Two**: We will receive a daily data feed, after Clearwater's daily reconciliation has completed, from Clearwater to Intacct/Salesforce to provide daily fund balances as of the previous day's market close. These fund balances can be viewed by fund holders in our ACF Connect donor portal. There are some details about how to handle fees that have not been worked out yet. Fees will probably be computed and applied monthly, not daily.

Are there any key partners or vendors you'd like to note here?

We received most effective support from our Sage Intacct reseller/consultant (Clark Nuber, Bellevue, WA) and from the Sage Intacct vendor. Sage went so far as to customize pricing to support a use-case that would have been otherwise unaffordable, and to develop an enhancement to their product to support community foundation investment fund requirements.

I feel especially proud of our entire organization for the accomplishments noted here because we were able to do this during the pandemic which required all but a very few of our staff to work remotely for the first time while supporting an increase in in our normal gift and grant transaction volume and also while processing over $100M in small business relief grants in 2020 as a service to Arizona county and municipal governments.

What lies ahead on your future roadmap?

In 2022, we are working on the following initiatives:

- IN PROGRESS: Completing the onboarding process with Clearwater Analytics to result in daily investment reconciliation, monthly and ad-hoc reporting for our Finance and Investment teams, and eventually (i.e. within the next year) providing daily fund valuations as of the previous day's market close.
- COMPLETED: Subscribe to a wealth intelligence service (e.g. WealthEngine, DonorSearch) and integrate with Salesforce
- IN PROGRESS: Migration from Constant Contact to Salesforce Pardot for external email communications, to take advantage of the superior integration between Pardot and Salesforce NPSP
- IN PROGRESS: Complete redesign and redevelopment of our www.azfoundation.org website

- INITIAL VERSION COMPLETED: Creation of an ACF Intranet for all staff members to use based on Microsoft SharePoint (included with our MS365 subscriptions).
- COMPLETED: Migration of policies and forms out of Zavanta and into Microsoft SharePoint, to be accessed via our new Intranet
- COMPLETED: Replacement of our Workplace (Facebook) communication facility with Microsoft Teams channels
- Extending our SSO (Single Sign-On) – TFA (Two-Factor Authentication) solution to additional externally hosted application systems, to include Cvent, SurveyMonkey, and others TBD

Beyond 2022, initiatives we will pursue in the future include the following:

- Our Community Impact Loan Fund has proven to be one of ACF's crown jewels in terms of successfully producing amazingly leveraged results for communities in Arizona. This especially includes our Affordable Housing Pre-Development Loan Fund. We have created a rudimentary loan tracking and management facility in Salesforce that we want to enhance to improve our management and effectiveness.
- Identify and review all forms in use throughout the organization, update if necessary and migrate the latest approved version of each to our new SharePoint-based Intranet
- Continuous analysis and enhancement of business processes and work flows, including opportunities to gain efficiency and improve service levels by migrating workflow processes from Wrike to Salesforce

What advice would you share with a decision-maker faced with a similar effort?

The Arizona Community Foundation Board of Directors, CEO (Steve Seleznow), and Executive Team were "all-in" with their support of our system and technology upgrade/replacement effort. Being all-in for two years is an amazing level of commitment. This is the most fundamental reason our efforts were successful. If your organization cannot truly make this level of commitment, we advise against making the attempt.

We also did almost all of the work internally, led by and performed by the key management and staff who would become the primary users of the business processes and systems post-implementation. We adopted a continuous improvement philosophy and encouraged everyone to make suggestions and not refrain from saying "this is not good enough" and "that can be improved". After two years of practice, we now have broad and deep continuous improvement skills throughout our organization which will be a benefit for years to come.

Case Study: **Foundation For The Carolinas**

Asset Size: $3.4B
Org Size: 105 FTE
IT Team Size: 8 FTE, which beyond the CIO and technical staff, includes a project manager, a business liaison, and an IT administrative support and business liaison associate

Old Tool Stack	New Tool Stack	Comparable Peer Tool Stack*
CRM: Blackbaud Raisers Edge classic **Donor Portal:** Blackbaud Net Community **GMS:** NPact Granted GE classic with CommunityForce online grant applications **Accounting:** Blackbaud Financial Edge **Scholarships:** CommunityForce online grant applications with NPact Granted GE classic **Business Intelligence:** Power BI	**CRM:** Give Interactive **Donor Portal:** Give Interactive **GMS:** Give Interactive with CommunityForce online grant applications **Accounting:** Blackbaud FE NXT **Scholarships:** CommunityForce online grant applications with Give Interactive **Business Intelligence:** Power BI	**CRM:** Salesforce **Donor Portal:** Custom solution **GMS:** Custom solution **Accounting:** FoundationPower (highly customized) **Scholarships:** N/A **Business Intelligence:** Salesforce, Power BI

*View a complete list of peer tool stacks beginning on page 25.

What prompted the need for your IT systems upgrade?

Our existing core systems do not adequately support the business needs in terms of productivity and efficiency (automation capabilities) or the customer / end user experience (timing of access to data). The classic versions of our Blackbaud products are no longer being developed and will eventually sunset, and RDS is required with current solution for high transactional users. Therefore, we needed to identify an appropriate solution to meet our business needs.

What were your priorities in finding replacement systems?

We will have a solution that works for us to provide exemplary customer service to our constituents based on efficient, accurate and visible processes and with the flexibility to evolve and grow with FFTC. Our core priorities are listed below:

1. **More streamlined**
    a. The FFTC Team requires a streamlined, intuitive, user-friendly, and comprehensive structure for our new core system solution.
    b. Data entry will be completed in one central location vs entering the same information across multiple records or systems – single source of truth.

   c. The solution will require limited to no work arounds to accommodate our business processes.
2. **Improved visibility**
   a. Data extraction will be easy and include all data fields across all system components (CRM, financial, grants, etc.).
   b. The solution will encourage internal collaboration making accountability central and easy to manage.
3. **Increased productivity**
   a. Users will be able to quickly get a 360-view of constituent and fund information and status of processes.
   b. Workflows will aid in process tracking; automation will be enabled where possible.
4. **Better client relationships**
   a. The solution will enable us to engage our prospects and clients in a comprehensive multi-channel manner leading to increased revenue and overall satisfaction.

Were there key stakeholder(s) driving your decisions?

Approximately 50 cross-functional business users were engaged during requirements elicitation, RFP response review and product demos. A smaller core team of 13 was utilized during limited scope, 4-month proof of concept phase. A similarly sized core team is expected to lead through the implementation.

What did you select as the core or foundation for your new operational system? (e.g., CRM or GMS or Accounting or something else)

We were attracted to a holistic donor and staff portal, the ability to remain with our known financial solution, the integration approach with a customer data platform so we can easily connect to other known products such as Eventbrite, and the use of Power BI – ultimately creating a comprehensive solution that can grow and expand as our needs change.

What was a primary driver for your selection?

- ☒ **Flexibility to customize and expand**
- ☐ Ease of use, out of the box
- ☐ Data integration between functionality areas
- ☐ Cost
- ☐ Other

What did implementation look like for your organization? For example, how did you handle data migration, process re-engineering, user requirements and testing, training and onboarding users and donors?

TBD – We are currently contracting for implementation. The number of years of data are being discussed, but we anticipate data clean up in our current systems. We use Promapp as our business process management tool, so processes will be updated as part of the project. The statement of work is built around user requirements, some testing will be completed as part of the system configuration with broader user acceptance testing prior to go live. A comprehensive change management plan is being developed to ensure the necessary communication (internal and external) and training prior to go live.

How did you accomplish an integrated solution in your new tool stack? Are there integration tools or custom code you've leveraged to ensure data and processes flow between systems? Are there any areas where you will rely upon manual effort?

The Give Interactive solution is inherently a CRM, GMS (excluding online grant applications at the moment) and fundholder portal in one solution. Segment, a customer data platform, is used to integrate with the other required solutions to create our holistic environment. We have been working with the Give Interactive team to minimize any manual processes at go live; however, there is potential for a few manual processes at go live until new functionality is implemented.

Are there any key partners or vendors you'd like to note here?

Barton Dyson with npAutomate serves as the Blackbaud implementation partner for FE NXT. He has extensive knowledge of the community foundation field and the FE NXT solution.

What lies ahead on your future roadmap?

Implementation will be a phased approach with a key set of functionality for go live, but with additional enhancements rolled out in Phase 2. The FFTC relationship management, donor relations and business development teams will have the capability to build on the base-level functionality required for basic day-to-day operations, expanding to include proactive sales and customer support activities to meet client needs.

What advice would you share with a decision-maker faced with a similar effort?

- Spend the time up front to define the business requirements
- Define the priorities or vision for the solution – revisit those as you make decisions
- Script vendor demos to include day-to-day scenarios so the end users can picture how they would use the system. Develop scoring criteria for demos, it’s a starting point for decision conversations.
- Consider investing in a proof of concept prior to committing if you question the ability of the solution to meet your needs.

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EXAMPLE CORE SYSTEM PROFILES

In March 2022, over 50 community foundations throughout North America shared a profile of their core technology systems with the Technology Association of Grantmakers (TAG), noting any future replacement systems where relevant. Because selection preferences are driven largely by the financial and staffing resources available to a foundation, their profiles have been clustered by the size of financial assets held by responding organizations.

Less than $250 Million in Assets

Constituent Relationship Management	Donor Management / Portal	Grants Management	Accounting / Financials	Scholarships	Dashboards / Business Intelligence	Data Integration Tool(s)
Foundant CSuite	Foundant CSuite / Foundant FA Portal	Foundant GLM	Foundant CSuite	Foundant SLM		
Stellar iPhiCore Enterprise	Stellar DonorView	Stellar iPhiCore Enterprise and GranteeView	Stellar iPhiCore Enterprise	Stellar iPhiCore Enterprise and ScholarView		
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite			
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite			
akoyaGO	FundWeb	akoyaGO	akoyaGO/Business Central	AwardSpring	none	none
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Power BI	
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Google Data Studio	Google Data Studio
SmartSimple		SmartSimple	Sage Intacct		Power BI	Azure Synapse
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Office 365	
None - Using Foundant 's opportunities feature	Foundant - CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Google Data Studio	
Salesforce	Salesforce	Foundant GLM	Foundant CSuite	Foundant SLM	Salesforce	Zapier + Slack
HubSpot	Stellar iPhi	Stellar iPhi	Stellar iPhi	StellariPhi	Excel / Tableau	
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM		
Stellar iPhiCore Enterprise	Stellar DonorView	Stellar iPhiCore Enterprise	Stellar iPhiCore Enterprise			
Blackbaud RENXT	Blackbaud RENXT & nPact Spectrum	nPact GENXT & nPact Spectrum	Blackbaud FENXT	nPact GENXT & nPact Spectrum	Blackbaud RENXT, FENXT, nPACT	
AkoyaGO	AkoyaGO	AkoyaGO	Business Central	GOapply		
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM		

$250-$500M in Assets

Constituent Relationship Management	Donor Management / Portal	Grants Management	Accounting / Financials	Scholarships	Dashboards / Business Intelligence	Data Integration Tool(s)
Salesforce	Foundant CSuite	Foundant GLM	Foundant CSuite	Smarter Select	N/A	N/A
Foundant CSuite	Foundant CSuite	Foundant Csuite	Foundant CSuite	Foundant CSuite	Foundant CSuite	Foundant CSuite
Foundant CSuite	Foundant CSuite	Foundant CSuite	Foundant CSuite	Foundant CSuite	Community Foundation of Broward, Inc	Foundant CSuite
Foundant CSuite	Foundant Foundant CSuite	Foundant GLM for competitive grantmaking (Foundant CSuite for standard)	Foundant CSuite	Foundant SLM for applications (processing done through Foundant CSuite)		
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Foundant Google Studios	N/A
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	GoogleData	Clearwater analytics for investments
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite and Excel for financials	Excel	Formstack and Asana	
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Testing several tools (Google Data Studio, Tableau, Power BI)	Formstack, Asana
Raiser's Edge	Net Communites	Granted Edge	Financial Edge	Granted Edge	Manual	
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	GoogleData	Clearwater analytics for investments
	Donor Central	Foundant GLM	FIMS	Foundant SLM		

$500M-$1B in Assets

Constituent Relationship Management	Donor Management / Portal	Grants Management	Accounting / Financials	Scholarships	Dashboards / Business Intelligence	Data Integration Tool(s)
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM		
Salesforce, Foundation Power	Salesforce community (custom)	seeking system that is compatible with Salesforce (we're actively looking)	5 year plan - seeking replacement for Foundation Power that is compatible with Salesforce	Whatever we choose for Grants Mgmt needs to work for Scholarships too. Want to move from Blackbaud.		
FoundaNT CSuite	Foundant Csuite	Foundant GLM	Foundant CSuite	customized		
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	Google Data Studio	
Raisers Edge	Donor Central (Future TBD)	Blackbaud Grantmaking (Future TBD)	Financial Edge	FIMS (Future TBD)	none	none
Blackbaud RENXT	FidTech DonorSphere	SmartSimple	FidTech PGFundConnection	NextGen	PowerBI	
Salesforce	Salesforce Experience - CF Owned and Developed	Foundant GLM	FoundationPower		Tableau	Leveraging the Salesforce API. Plus, a custom code with gravity forms (Wordpress plugin). Use Kingsway soft for FoundationPower/ SF integration.
RaisersEdge	RaisersEdge	Foundant GLM	FIMS	Academic Works		BNR Technologies - interface between FIMS and RE
Raiser's Edge (Future TBD)	NetCommunity (Future TBD)	GrantedGE (in-house mgmt) and SmartSimple (online applications) (Future TBD)	Financial Edge (Future TBD)	NextGen (Future TBD)	Power BI (Future TBD)	(Future TBD)
Salesforce	Salesforce Community Plus	Foundant GLM	Sage Intacct	Foundant SLM	Salesforce	Workato
Raiser's Edge	In-House / Custom	GrantEdge	Financial Edge		SQL Server Reporting Services	
Salesforce	Salesforce	Salesforce	Sage Intacct	Salesforce	Proprietary	

Over $1B in Assets

Constituent Relationship Management	Donor Management / Portal	Grants Management	Accounting / Financials	Scholarships	Dashboards / Business Intelligence	Data Integration Tool(s)
none	Gifting Network	Fluxx	FIMS	FIMS	Crystal Reports	none
Give Interactive	Give Interactive	Give Interactive with Community Force online application	Financial Edge NXT	Give Interactive with Community Force online application	Power BI - integrated w/ Give Interactive as part of their solution	
Stellar iPhi Core Enterprise	Stellar DonorView	Stellar iPhi Core Enterprise	Stellar iPhi Core Enterprise	Stellar iPhi Core Enterprise	SQL Server Reporting Services	SQL Server
Salesforce	Salesforce Communities	SmartSimple	Foundation Power	SmartSimple	Salesforce	
Salesforce	Salesforce	WizeHive	Sage Intacct	Survey Monkey Apply	Tableau	Tableau CRM
Salesforce	custom	custom	Foundation Power (highly customized)	not applicable	Salesforce, PowerBI	APIs, stored procedures, Kingsway Soft
		FLUXX				
RE or Salesforce	Customized or Salesforce	SmartSimple + TBD	Blackbaud FE or Sage IntAcct			
Salesforce	Salesforce	Salesforce	NetSuite	Salesforce	Salesforce	N?A
Foundant CSuite	Foundant CSuite	Foundant GLM	Foundant CSuite	Foundant SLM	N/A	N/A
FIMS (Future TBD)	Donor Central Nxt (Future TBD)	SmartSimple	FIMS (Future TBD)	IGAM (Future TBD)	PowerBI	TBD

LANDSCAPE OF AVAILABLE SYSTEMS

This guide is provided by the Technology Association of Grantmakers (TAG) as a companion to the *Landscape of Integrated Systems for Community Foundations* which provides an overview of available systems at www.tagtech.org/communityfoundationsystems.

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