The Catholic Foundation of Greater Philadelphia

Consulting Services: System Conversion

THE CUSTOMER

The Catholic Foundation of Greater Philadelphia is an independent, non-profit community foundation that is committed to growing philanthropy according to the teachings of Jesus Christ. For more than a decade, the organization has performed an important role in the Catholic philanthropic ecosystem, serving as a traditional grantmaking foundation, charitable fund management solution, and a cost-effective fundraising consultant for Catholic causes.

The Foundation manages more than 160 endowment, donor-advised (DAF), and parish funds that support a variety of Catholic causes in the region, with approximately $60 million in assets under management. As an independent Catholic community foundation, the organization helps donors achieve their faith-based philanthropic goals by directing their donations to the specific causes they wish to support.

THEIR CHALLENGE

The Foundation needed to find a new donor portal that could deliver a better experience for both their internal team and donors/fundholders. Their previous system required them to upload and download spreadsheets in order to update the portal information. Similarly, DAF grant requests were handled through email and paper forms, which required staff to call the fundholders to verify every request. These processes were inefficient, error-prone, and resulted in a time-consuming donor experience.

As a result, The Foundation put together a RFP that addressed their broader system needs, which included the upgraded donor portal, as well as improved fund management, grant management, and integrations with their existing financial and CRM systems: Blackbaud Financial Edge NXT and Raiser's Edge NXT.

OUR RESULTS

The Foundation looked at a number of partners and systems to address their needs. Ultimately, it was NPact's software features and their knowledge of implementing integrations that stood out. The team decided to move forward with NPact's Foundation Cloud Grant software, Foundation Cloud Community Portal, as well as Fund Investment Tool (FIT) because it addressed many of their fund accounting needs and integrated well with Blackbaud solutions.

With their old systems, The Foundation was putting all of the gifts, grants, and distributions into a spreadsheet, weekly. Even journal entries were created mostly manually. It was a tremendous amount of manual work that was prone to mistakes. FIT automates these processes by taking info directly from RE NXT and FE NXT, then calculating how much money needs to be moved from each fund to where it's going. It even creates journal entries that then go to FE NXT. Other FIT benefits for The Foundation include weekly rebalancing, allocation of gains and losses to the funds, and help with the annual fund service fee.

The Foundation is also pleased with the benefits that Foundation Cloud and the Foundation Cloud Community Portal provide, including their ability to handle different kinds of grants and the improved user experience of the donor portal.

CUSTOMER VIEW

KURT A. GABBARD, CFO

The Catholic Foundation of Greater Philadelphia

BEFORE

"We were using various systems that did not have all of the features we needed. We were doing a lot of data entry in spreadsheets, and manually moving data between FE and RE. We needed to change our fund portal to prepare for future growth and that propelled us to want to integrate all of those systems. We needed to go to the next level."

AFTER

"NPact's knowledge of Blackbaud's integrations really stood out to us, as did the robustness of their Foundation Cloud Grants and Foundation Cloud Community Portal. Fund Investment Tool (FIT) was also a gamechanger. It has increased our efficiency and streamlined our processes, allowing us to eliminate spreadsheets and work more strategically. We were able to get rid of the spreadsheets."

Interested in working with NPact?
Our deeply experienced team of professional consultants will provide you with powerful tools and know-how to drive philanthropy in your community. There is no project too big or too small, and work can be performed on-site or remotely. Start the conversation today by visiting www.npact.com/consulting.