

Innovation and the Power of Partnership
with Virginia G. Piper Charitable Trust

BROMELKAMP

VIRGINIA G. PIPER
CHARITABLE TRUST

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Introduction of Speakers

Kelly Matti
System Project Manager
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CHARITABLE TRUST

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Chief Executive Officer
BROMELKAMP

Barb Ryan
Account Manager
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Housekeeping

- Be kind - mute your line
- Ask us questions
 - Via chat throughout; and
 - At the end of each segment
- We'll steer clear of the weeds
- You'll receive a recording of this session

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Virginia G. Piper Charitable Trust

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Key Questions

- Can smaller foundations emulate the technology resources of larger foundations?
- Can one system do it all?

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Bringing Everyone Together

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graph LR
    A[Input and Feedback] --> B[Identification of Internal Systems]
    B --> C[System Search]
    C --> D[Implementation and Integration]
  
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Piper Trust System Integrations

1. Salesforce (Contacts)
2. GuideStar
3. Riva (Contact Sync)
4. Eventbrite (Events)
5. Campaign Monitor (Mailing)
6. Form Assembly (Applications)
7. IGAM (Grant Applications)
8. Blackbaud GIFTS (Grants)
9. MIP (General Ledger (GL))

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Integrations for
Campaign Monitor
NetSuite

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Poll

How many systems do you use internally to capture data for your foundation – consider grants, outcomes, contacts, accounting and events?

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Presentation Segments

- Keystone: Our Relationships
- Efficiency: Automation
- From Data to Intelligence: Power BI Dashboards

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Keystone: Contacts and Organizations

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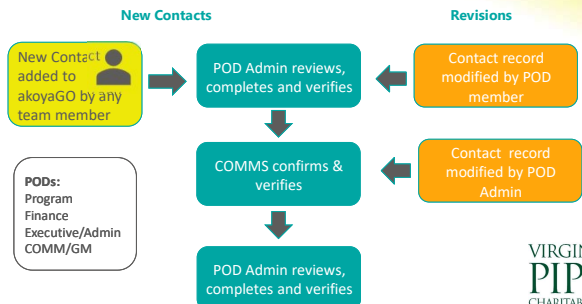
Keystone: Our Contacts

- Before:
 - Multiple databases serving different departments
 - Contacts added in all databases
 - Sharing by email communication
- Now:
 - One database
 - Shared responsibility

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Keystone: Contacts and Organizations



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Our Partnership

- Thought Partner
- Dedicated to Philanthropy
 - The Greater Good
 - Resource Minded
- Learning Organization
- Innovation



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Efficiency: Automation

Streamlining Grant Award Notification: COVID Emergency Grants



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Poll

How are you sending grant award materials?

- Paper/mail
- Hybrid mail/email
- Email
- Portal



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From Data to Intelligence



Power BI

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From Data to Intelligence

- Dynamics Dashboards
- PowerBI Dashboards
 - Management vs. Productivity

Future: Direct link of data visualizations to our website for the general public through power BI



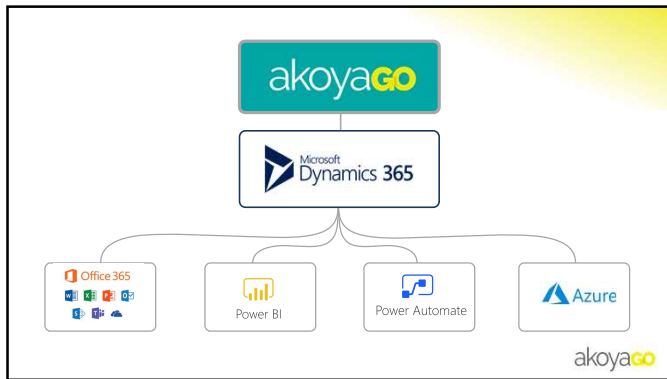
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Imagining the Possibilities & Collaborative Partnership

- Smaller foundations can emulate the technology resources of larger foundations.
- One system with few integrations
- Success factors:
 - Partnership that promotes innovation
 - Technology mindset leadership
 - Dedicated person for mid/large foundations
 - A learning mindset



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The Bromelkamp Company

- 40+ years in service to grantmaking
- Mission to make philanthropy better
- Customer-centric
- In partnership for innovation



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Q & A

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Thank you for joining us.



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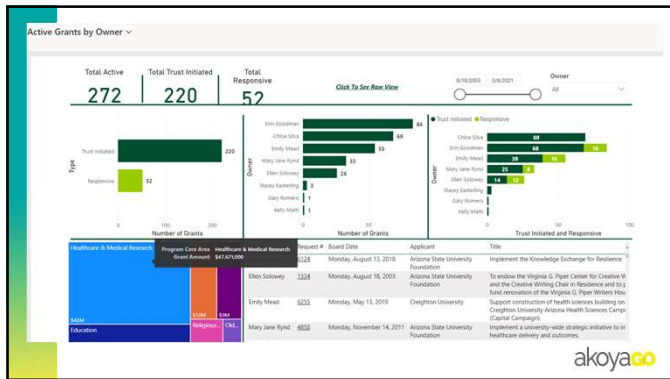
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The screenshot shows the 'Payment Processing Workflow' interface. It includes a table of payment requests with columns for Request #, Award Date, Applicant, Grant Amount, and Status. The table is currently empty, showing 'No data available'.

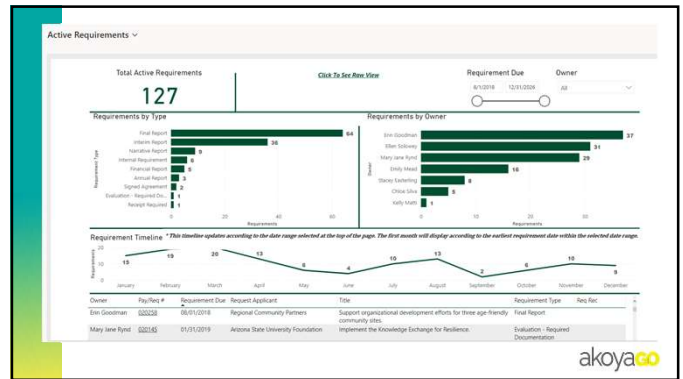
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The screenshot shows the VIRGINIA G. PIPER CHARITABLE TRUST dashboard. It displays the Total Grant Amount Awarded (\$511M) and the Total Number of Grants Awarded (8553). Below this, there is a bar chart showing the distribution of grant amounts. To the right, there is a treemap visualization showing the distribution of grants by program strategy. The bottom section of the dashboard lists recent grant requests with details such as Request #, Award Date, Applicant, Grant Amount, Title, and Program Strategy.

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