

McGREGOR FUND

Problem:

Small staff with evolving needs requires flexible, scalable software to support a paperless process.

Solution:

First Akoya.net and eGrant.net provide an online, fully integrated, configurable system.

“Given our small hands-on staff and fluid roles, First Akoya.net and eGrant.net provide the flexibility and ability to define team roles and allow access to specific areas of our grants management solution.”

– TeQuion Brookins

Small Foundation Staff Makes a Big Impact with Integrated Technology

The McGregor Fund works to support and strengthen a safety net of essential resources and opportunities for vulnerable members of their community, particularly those experiencing sustained and concentrated poverty. In 2016, the McGregor Fund provided \$7.6M to the community through 42 grants that focus in their primary areas of basic needs, recovery and restoration, and skill building.

Working with a small staff of just six employees, the McGregor Fund has always understood the value of using technology to streamline grantmaking operations. For years, the McGregor Fund used First Pearl by Bromelkamp Company, an on-premise software that integrates contact and grants management. Over time, the Fund customized the software to match their work, creating efficiencies that allowed more time for focusing on community needs.

Evolving Needs Require New Grantmaking Solution

As the McGregor Fund evolved, so did their need for technology that aligned with their current processes and initiatives. They were looking for a more flexible grantmaking solution that included an automated, paperless grant application process, increased database functionality, and the ability for more user-defined roles to access select capabilities within the software. Although they liked working with Bromelkamp, and their current software had served them well, it was time to search for new online grantmaking technology that better fit their requirements for a more integrated solution.

The McGregor Fund began a comprehensive search that included seven vendors. They quickly realized that software solutions built for businesses did not intuitively align with their grantmaking processes. This discovery helped narrow the search, and after a thorough evaluation, the McGregor Fund concluded that their best choice was Bromelkamp Company's First Akoya.net cloud-based grantmaking solution with eGrant.net.



“We knew this solution would work well for us and a driving factor was our existing relationship with Bromelkamp. They knew our foundation and how the conversion to a new solution would impact us,” said TeQuion Brookins, Finance & Operations Officer, McGregor Fund. “The fact that they operate Bromelkamp Foundation means they have practical knowledge of how foundations work, and that understanding shows in the way they work with McGregor Fund.”

Flexible Solution that Matches High Demands

The McGregor Fund's decision to continue their relationship with Bromelkamp Company was undoubtedly influenced by their positive working relationship of more than ten years. However, it wasn't the only reason they decided First Akoya.net with eGrant.net would be the best grantmaking solution for them. The McGregor Fund knew their new cloud-based solution would reduce costs and resources spent on IT. Furthermore, First Akoya.net with eGrant.net would decrease the manual efforts of their small staff through integration with MS Outlook and SharePoint, while also automating more processes and workflows, resulting in their staff's ability to focus on higher-value activities.



Single login to one integrated solution

Manages the entire grant process on- or off-line

Provides a full 360° relationship view with robust CRM

Works the way you do, now and in the future

Automated, agile and innovative platform

“The icing on the cake was the ability to integrate with other platforms like SharePoint to archive older grant records. This is clearly a time saver and gives us the ability to have paperless applications.”

– TeQuion Brookins

Inspired Design meets *Dynamic Technology*

About Bromelkamp Company

Bromelkamp Company provides foundations with integrated and online grant management software solutions that work the way you do. Their inspired design meets dynamic technology to provide software that facilitates your entire grants management process. Find out more at www.bromelkamp.com.

- › www.bromelkamp.com
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About First Akoya.net

A cloud-based solution with built-in CRM to manage constituent relationships, First Akoya.net includes the ability to create, track and store communications, set workflows for reminder contacts, and categorize contacts into user groups. Besides integration with MS Outlook, First Akoya.net can bridge to MailChimp, survey tools, mapping software, and file sharing solutions such as SharePoint.

About eGrant.net

For a flexible and efficient online applicant portal, the McGregor Fund also selected eGrant.net. This cloud-based solution that integrates with First Akoya.net allows organizations to eliminate paper, streamline their application process, and ensure data accuracy. Once this program was fully implemented, the McGregor Fund shifted to an entirely paperless grant application process.

Database Advice Cleared the Way for a Smooth Transition

Before transitioning to their new grantmaking solution, the McGregor Fund performed a significant data cleansing project. Relying on Bromelkamp Company's expertise and experiences from previous successful implementations, the McGregor Fund staff followed recommended steps such as data preparation, to make the conversion process as easy as possible. They cleaned up their records and made thoughtful decisions on what data to bring into their new database. Working with the Bromelkamp team, and moving clean data with well-defined fields, made the conversion from Pearl to First Akoya.net with eGrant.net a straight-forward process.

“Our reporting has improved a great deal with our new solution.

The solution capabilities are more intuitive, provide many more options, and offer the flexibility to adapt things like fields and user roles as we change our processes.”

– TeQuion Brookins

Hurry Up! There is a Lot to Be Gained from Bromelkamp's Solution

The McGregor Fund has no regrets about the decision to move to First Akoya.net with eGrant.net. They continue to find ways to integrate their workflows and leverage all the features and functions available in the solution.

Ongoing support, learning opportunities and networking such as the Bromelkamp Company annual Users Group contribute to the McGregor Fund's satisfaction. The Users Group provides a platform for sharing ideas and asking questions about specific solution needs. Users also find value in sharing tips and bouncing ideas off of colleagues who also use Bromelkamp Company software.

“Bromelkamp Company is extremely helpful. You can tell everyone who works there loves the products and are dedicated and constantly trying to improve them,” explains TeQuion Brookins. “I would tell anyone considering this solution to hurry up; there is a lot to be gained from First Akoya.net with eGrant.net.”

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