



case study

ABOUT:

Blue Mountain Community Foundation (BMCF) - located in Walla Walla, WA - was established in 1984 based on the idea that southwest Washington State needed a place for donors who cared about the community to make long-term investments.

Since securing its first endowed fund, the Foundation has grown to over \$38 million in 260 charitable funds. BMCF is actively managed by 3.5 full time employees.

Mission and Vision: The mission and vision of BMCF is to connect people, charitable causes, and community needs in order to improve the quality of life for all in the Blue Mountain area through philanthropy.

Giving: BMCF gives over \$1.5 million in grants annually through 367 funds. The grants support nonprofits and programs throughout Southwest Washington State. This active community foundation also awards over \$400 k in scholarships each year.

BMCF's Top 5 Advantages of CommunitySuite:

1. Integrated software solution
2. Simple, straightforward bank reconciliation process
3. Consistent reporting
4. Fund manager portal
5. Streamlined administration



BLUE MOUNTAIN
COMMUNITY
FOUNDATION

Serving Donors. Strengthening Communities.

Previous Financial System:

We chose CommunitySuite as our integrated financial software solution after years of using MicroEdge's FIMS software. We felt that FIMS was overkill for what we needed and that it was too labor intensive to work with.

The Community Foundation first discovered the CommunitySuite product at the 2014 Philanthropy Northwest Convening. During the convening, the creator of CommunitySuite, Chris Sutton, gave a presentation demonstrating the software to interested community foundations. Dean Ericksen of Ericksen Initiatives also highlighted the software as a Smart Technology for Community Foundations. After the demonstration, I was convinced that CommunitySuite was better suited to our needs and it seemed to solve all of our problems.

Favorite CommunitySuite Feature:

A favorite feature that helps BMCF is the simple, straightforward bank reconciliation process used for bank accounts and investment holdings. I also rely on the easy banking transfers that are made possible by the balance swap function.



FOUNDANT
for Community Foundations

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Joan Cosani
Director of Finance



“To close the month takes me just a couple of days using CommunitySuite. It used to take at least two weeks! And our auditors really liked being able to have access to CommunitySuite and see our attached documentation. It helped speed up their work a lot.”

“Blue Mountain Community Foundation has had far better consistency in our reporting and during our annual audit cycle, all while using less staff time from the in-house finance department.”

Benefits of CommunitySuite:

CommunitySuite requires less staff time by our in-house finance department to manage. After using the software system for over two years, Blue Mountain Community Foundation has had far better consistency in our reporting and during our annual audit cycle.

Life as a Foundant Client:

I have enjoyed being a client of Foundant as a CommunitySuite user. In particular, I like being part of a group of system users who share ideas and create innovative processes that make running a community foundation more efficient and allow for greater impact.

Features and Support Tools:

CommunitySuite features and tools used most often by BMCF include the Fund Manager portal, which allows fund holders to view their balances, make grants and print monthly fund statements. Fund Manager is easy to use for our fund holders.

When looking for answers to questions or if I need help understanding any processes, I turn to the Online Documentation Help System or make a request to the CommunitySuite Email Support - which is always quick and helpful.

Feedback for Others:

I would tell another Foundation who was thinking about becoming a CommunitySuite user to definitely check it out. CommunitySuite has greatly streamlined the administration of Blue Mountain Community Foundation by helping us manage 13 bank and investment accounts simply. In FIMS, it used to take the better part of a week for us to reconcile all these accounts now, with CommunitySuite, it takes about half a day.