



# case study

## ABOUT:

In 1997, Merchants National Bank - a community bank in Kittanning, Pennsylvania - marked its 100th anniversary by giving \$100,000 to initiate a community foundation for Armstrong County. Local citizens began building a permanent endowment for the **Community Foundation** as well as garnering donor-advised funds. The Community Foundation was incorporated in 1998 and was granted 501c3 status in January 1999.

**Mission and Vision:** To enhance the quality of life for the people of mid-Western Pennsylvania by giving grants and scholarships, building a permanent endowment, promoting philanthropy and volunteerism and providing leadership and building partnerships.

**Giving:** We are a staff of three and we give grants, scholarships and organizational support to address the changing needs of our community. We currently hold about \$8 million in assets, have 27 scholarship funds awarding over \$61,000 last year plus over \$256,000 in grants in 2015.

### Community Foundation's Top 5 Advantages of CommunitySuite:

1. Simple distribution of gains and losses each month
2. Financial and donor software all in one
3. Saves time
4. Highly responsive customer service
5. Events management



## Previous Financial System:

Our financials were managed by an outside accountant, which cost us a lot of money each month because it took a lot of time due to complicated calculations. We used QuickBooks as our financial software, DonorPro to manage our donors and donations, and we didn't have anything that helped us manage our events. Trying to run reports in DonorPro wasn't very easy and it was a challenge every year to put together mailing lists and invitation lists for events.

## Favorite CommunitySuite Feature:

I'd have to say my favorite part is when I go to distribute gains and losses at the end of each month for our investment funds, it is a simple click of a button and it's done. This is something that we previously needed an outside accountant for every month...it was very time consuming. I also love that it is financial and donor software all in one.



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**Tracy Peters**  
Communications &  
Administrative Coordinator

***“[The Foundant team] welcomes suggestions and uses them to make changes to improve the software for everyone.”***

***“We don’t have to hire an outside person so we all have better knowledge about our financials every day. On top of that, we work together more than we did before.”***

## **Benefits of CommunitySuite:**

We spend far less time on financials each month, it is now something that we know how to do so we don't have to hire an outside person, and since we run it all ourselves, we know exactly what's going on financially every day.

## **Life as a Foundant Client:**

Great! We always have a pleasant experience talking with the Foundant CommunitySuite team. They are very responsive to our needs, always doing their best to answer our questions quickly and they welcome suggestions and use them to make changes to improve the software for everyone. We love being Foundant CommunitySuite clients!

## **Features and Support Tools:**

The events have helped us track our RSVPs and income and expenses for specific events, which has been very useful - as we didn't have anything like that before CommunitySuite. We recently starting using the grant catalog which has helped us eliminate paper grant requests.

We do use all system support options, although I prefer phone support. The online help info and training videos have also proven to be pretty helpful at times.

## **Feedback for Others:**

Do it! It is so worth it and you'll love it! I think some of my other responses have already answered this, but it has helped us tremendously. It has streamlined all of our processes, making them easier and quicker to complete. It has made my job easier and I am able to spend less time on basic operations, so I can focus on other projects.