Birthright Israel Foundation Supports Steady, Planned Growth with DrillPoint Reports

Birthright Israel Foundation has accomplished something that many charities and nonprofits aspire to: expanding their base of donors and meeting the goals of planned growth. As a result of successfully executing their plan, in the last six years, Birthright Israel Foundation has grown to include nine regional fundraising offices and three departments grew to 20 departments.

David Shapiro

"We changed our philosophy to get into much broader based fundraising," recalls Birthright Israel Foundation CFO David Shapiro. "Broadening our fundraising necessitated a lot more fundraisers in the field and therefore much larger, more complex budgets."

An increase in funds raised would mean that Taglit-Birthright Israel could expand its vision of strengthening Jewish identity, Jewish communities and solidarity with Israel by providing a 10-day trip to Israel for young Jewish people.

"The trip is a gift to young Jewish adults to give them an opportunity to learn about their homeland and to learn about their heritage," explains Shapiro.

In response to the expanding organization, Shapiro took measures to ensure that there was adequate reporting and access to data for the growing management team at Birthright Israel Foundation. "When I started here, we only segregated three departments: finance, administration, and fundraising," recalls Shapiro. "When I only had three departments to report on, it was relatively easy to do monthly budget reports and send that information out to each of those departments."

Growth meant rethinking the approach to budgets and necessary reporting. "Each one of our regional offices has their own budget in addition to our main office. Now that we have 20 departments, creating and distributing reports became much more onerous."

Birthright Israel Foundation invested in DrillPoint Reports to augment their Abila MIP Fund Accounting software. With DrillPoint, Shapiro was able to use the date range flexibility of DrillPoint to set up monthly reports for each department. "While DrillPoint would allow me to accomplish the departmental reporting within a single report, I wanted to take this one step further to make it very, very easy for my department heads."

Taglit-Birthright Israel
(http://www.birthrightisrael.com/)
Birthright Israel Foundation
(http://www.birthrightisrael.com/supportus)

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Rather than having one report for each department and changing the date range of that report each time, Shapiro provided them with a report for each month of the year and made those reports available to each department head in a separate shared directory on their network. "Based on their username, I can control what information each user see. So the same report looks different to every user. Each month I inform them once we have closed the books letting them know they can log into their DrillPoint report and just hit refresh. They have access to their most recent monthly report along with all associated transaction data to answer any questions they may have about their reports," notes Shapiro.
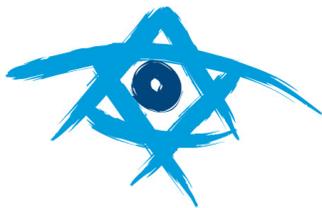
Now the Birthright Israel managers have real-time access to the data they need to better oversee their fundraising and fund management.

"DrillPoint gives me a lot of latitude to feed information to the department heads in a way that makes it easier for them," said Shapiro. "It's my goal to make it easier and informational for them without creating too much extra work."

DrillPoint allows managers to access reports without having to be trained on either DrillPoint or MIP Fund Accounting.

"That's the nice part about DrillPoint," notes Shapiro. "The staff doesn't have to learn the software." DrillPoint works like Excel and end users who have familiarity with Excel have the skillset to navigate DrillPoint. But Shapiro took it one step further to ensure ease of use, "We created a log in instruction sheet, which takes them through – click by click – the steps they need to access and view reports. And how to drill down for a more granular look at vendors and expenses."

The decision to turn to DrillPoint as a reporting solution has been successful. "It has been a very successful roll out," says Shapiro. "I found DrillPoint to be very, very helpful in solving my needs. I would recommend it highly."

BIRTHRIGHT ISRAEL
FOUNDATION
www.birthrightisrael.org

Since its inception in December 1999, Taglit-Birthright Israel has sent over 400,000 Jewish young adults to Israel. They come from 66 countries, all 50 U.S. States and Canadian provinces, and from nearly 1,000 North American colleges and universities.

The trips are funded from many sources including parents of trip participants, alumni of the program, the program's founders and other philanthropists, the State of Israel, the Jewish Federation system and Keren Hayesod, the Jewish Agency for Israel, and thousands of individual donors from around the world.

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DrillPoint Reports
(http://www.capitalbusiness.net/products/drillpoint-reports)

With DrillPoint Reports you can:

• Integrate Microsoft Excel® directly with Abila MIP Fund Accounting in real-time.

• Leverage Microsoft Excel® functionality to manipulate your data, conduct what-if analysis and add formulas and graphs to your reports for better report presentation.

• Drill down directly from Microsoft Excel® to specific transactions and source documents for more detailed information, saving you the extra step of having to go back to Abila MIP Fund Accounting for the same information.

• Create customer financial statements using pre-formatted templates that enable your to include borders, graphics, your organizations' logo and other personal touches to distinguish your financials, making them easier to understand and act on.

• Create statistical or outcome measurement reporting by utilizing user-defined fields in your reports.

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