



**Exceed! Premier™ and QuickBooks® integration empowers Philanthropic Ventures Foundation to bring simplicity, trust and effectiveness to grant making.**

"Using Exceed! Premier we have centralized and can now harness our most valuable information. We can record, schedule and access details of all grants and PVF programs to operate faster and more efficiently than ever before."

**Dawn Hawk  
Program Officer  
PVF**



## SUCCESS STORY

**Philanthropic Ventures Foundation**

## AT A GLANCE:

### Customer:

Philanthropic Ventures Foundation

### Location:

Oakland, California

### Business Challenge:

Scattered, uncoordinated data entry meant inefficient and inaccurate management of critical mission-related processes.

### Solution:

Exceed! Premier for fundraising and grant making management, coupled with QuickBooks for accountability.

### Results:

Significantly improved efficiency in data entry and accuracy, resulting in faster response to grantees and better accountability to donors.

## Customer Profile

Philanthropic Ventures Foundation (PVF) is a public foundation based in the San Francisco Bay Area that works with individuals, families, businesses and foundations to create innovative giving programs that match the specific interests of donors. PVF takes the investment approach to charitable giving, seeking out quality people and programs doing outstanding human service work.

## Business Challenge

In order to give when giving is most needed and meet the requirements of its donors, PVF looks to issue grant requests within a 48-hour period. PVF used Microsoft® Excel spreadsheets, ACT contact management software and QuickBooks® to manage the many elements of grant giving. PVF staff found that it was unwittingly wasting valuable time on administrative tasks associated with maintaining the programs, primarily data entry. The requirement to enter grant activity information in three programs to ensure consistency made it difficult to maintain accurate records and decreased the time that the organization could focus on its mission of connecting donors' with their cause.

## Solution Overview

In 2001, PVF chose Exceed! Premier – Telosa's flagship fundraising and donor management software – specifically for its grant making and grant seeking functions, combined with its donor tracking capability and powerful integration with QuickBooks®.

## Business Benefits

PVF can manage the entire fundraising and grant making procedure through Exceed! Premier, eliminating the time-consuming need to enter data in three separate programs. In addition, PVF can transfer grant and gift information directly into QuickBooks to generate grant checks and log donor gift deposits.

Due to improved reporting capabilities in the software, PVF can now optimize and analyze its grant giving activities to ensure that its program's goals are achieved. For example, by using Exceed! Premier, PVF has eliminated the manual processes associated with analyzing the allocation of funds for its many programs.





Now the organization can change the parameters of its reports to analyze the history of grants given over one month or the past 10 years. Finally, PVF can automatically generate donor and grant letters through the unique mailing features found in Exceed! Premier, again saving the organization precious time.

Today, PVF is using technology to streamline and more efficiently manage its fundraising and grant giving activities. The organization can quickly access donor or grantee information and grant programs to ensure that all aspects of the process are thoroughly accounted for and on schedule. The organization is saving time on data entry and is more productive as a result.

"Through the use of technology, we are able to save time on performing administrative tasks like data entry, grant check writing and information management," said Hawk. "By making the decision to invest in Exceed! Premier, we estimate that we are operating five to six times more efficiently due to technology."

Bill Somerville began Philanthropic Ventures Foundation to do something different — to bring joy, simplicity, trust and effectiveness to grant-making. He knew the answer was not more — more paper, more procedures, more obstacles, more time. And he believed that if giving grants involved fewer, simpler processes, every dollar would work harder and do more.

Their approach is working. In 17 years, thanks to their family of more than 2,000 donors, they have made grants of \$50 million. PVF strives to make a significant impact with every charitable dollar it invests.

Thanks to their use of Exceed! Premier and QuickBooks, they have maximized their efficiency, enabling them to meet their goals of effectiveness and simplicity.

"A computer is like a car. You don't want to spend your time under the hood, you want to drive it," says Somerville. "Exceed! Premier is like a clean, well-running engine for our car. It minimizes the time we spend behind our computers, so we can spend more time in front of people."

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**Bill Somerville**  
**President and Founder**  
**Philanthropic Ventures**

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