Beyond Project Management: Create More Impact with What You Know

European Foundation Center
2004 Annual Conference
Athens, Greece

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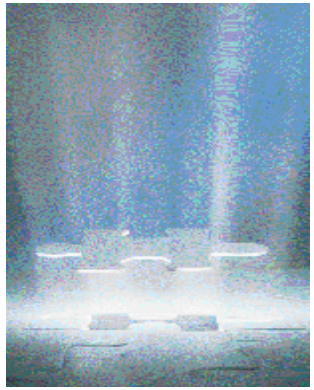
The Difference Between Information and Knowledge

- **Books on a bookshelf = information**
- **The application of information to solve a problem = knowledge**

  Knowledge is a human act

- **To solve problems, professionals piece information together, reflect on their experience, generate and use insights to solve problems.**



Source: Richard McDermott - 1999

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Some Key Questions for Foundations

- **What information and knowledge do we need to achieve our goals?**
- **How can we gather, classify, and share information so that it's most useful?**
- **What tools can help us to store, access and analyze information?**
- **How can we gain insights and knowledge to make better informed decisions?**

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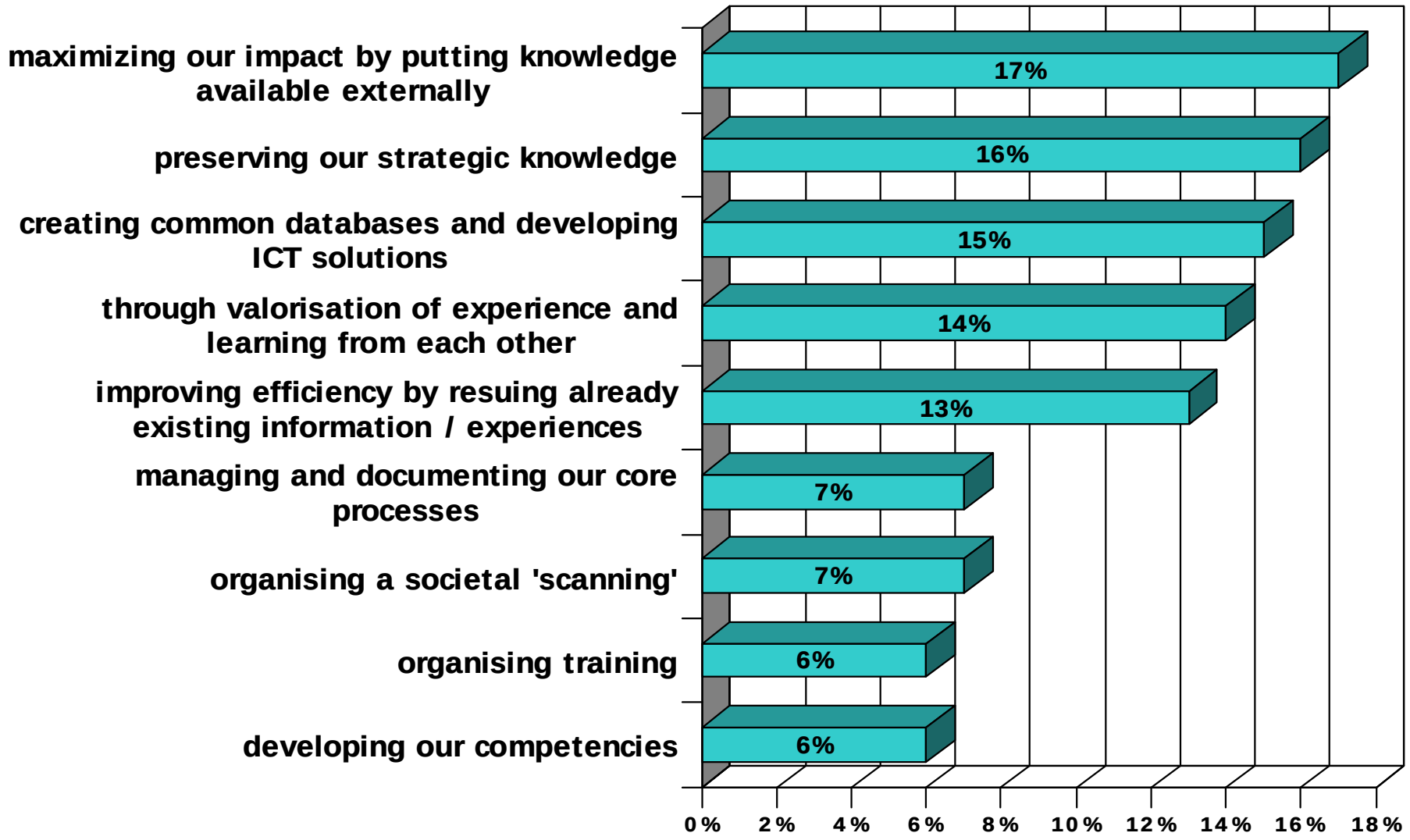
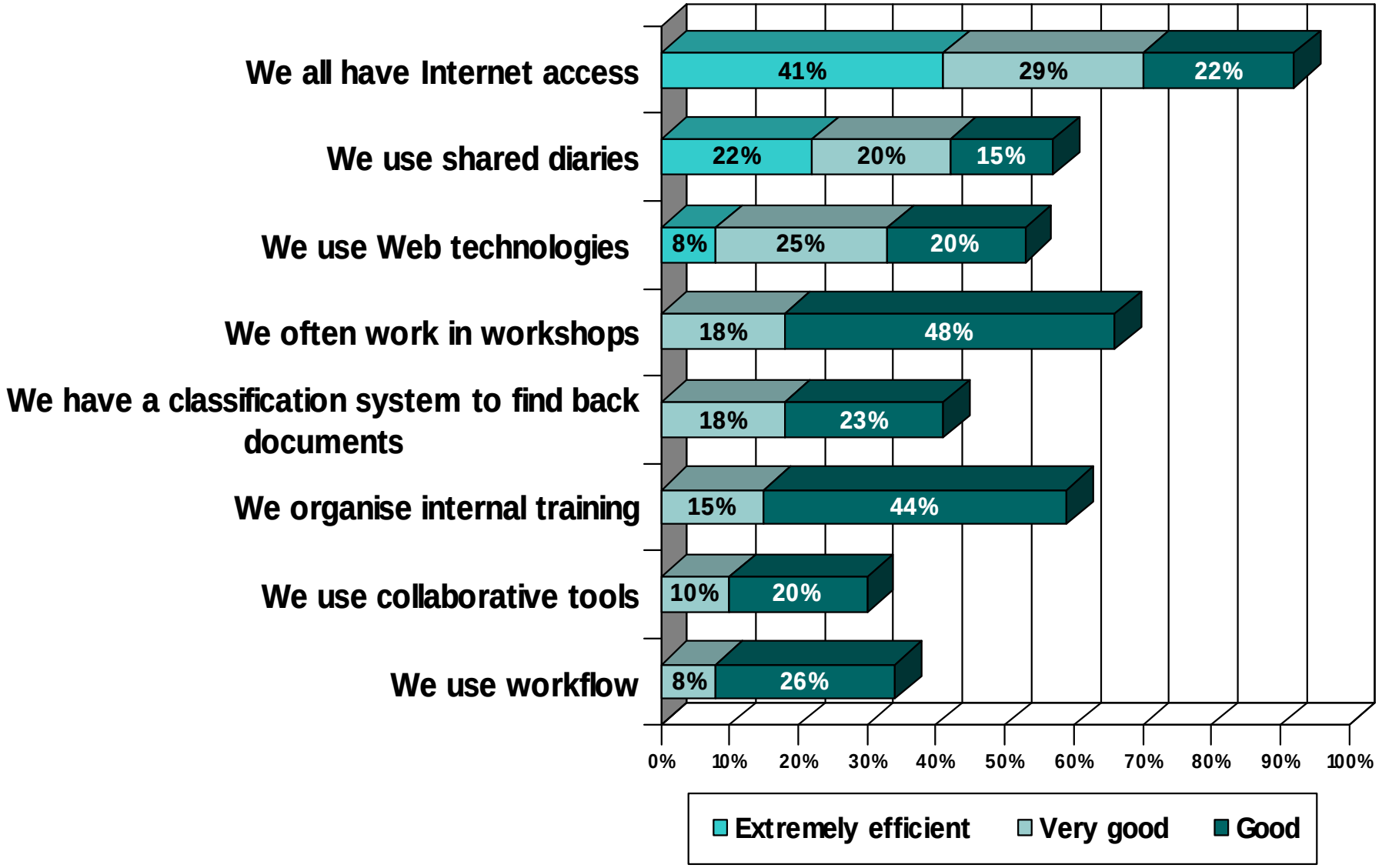
Knowledge management in my European foundation is about:



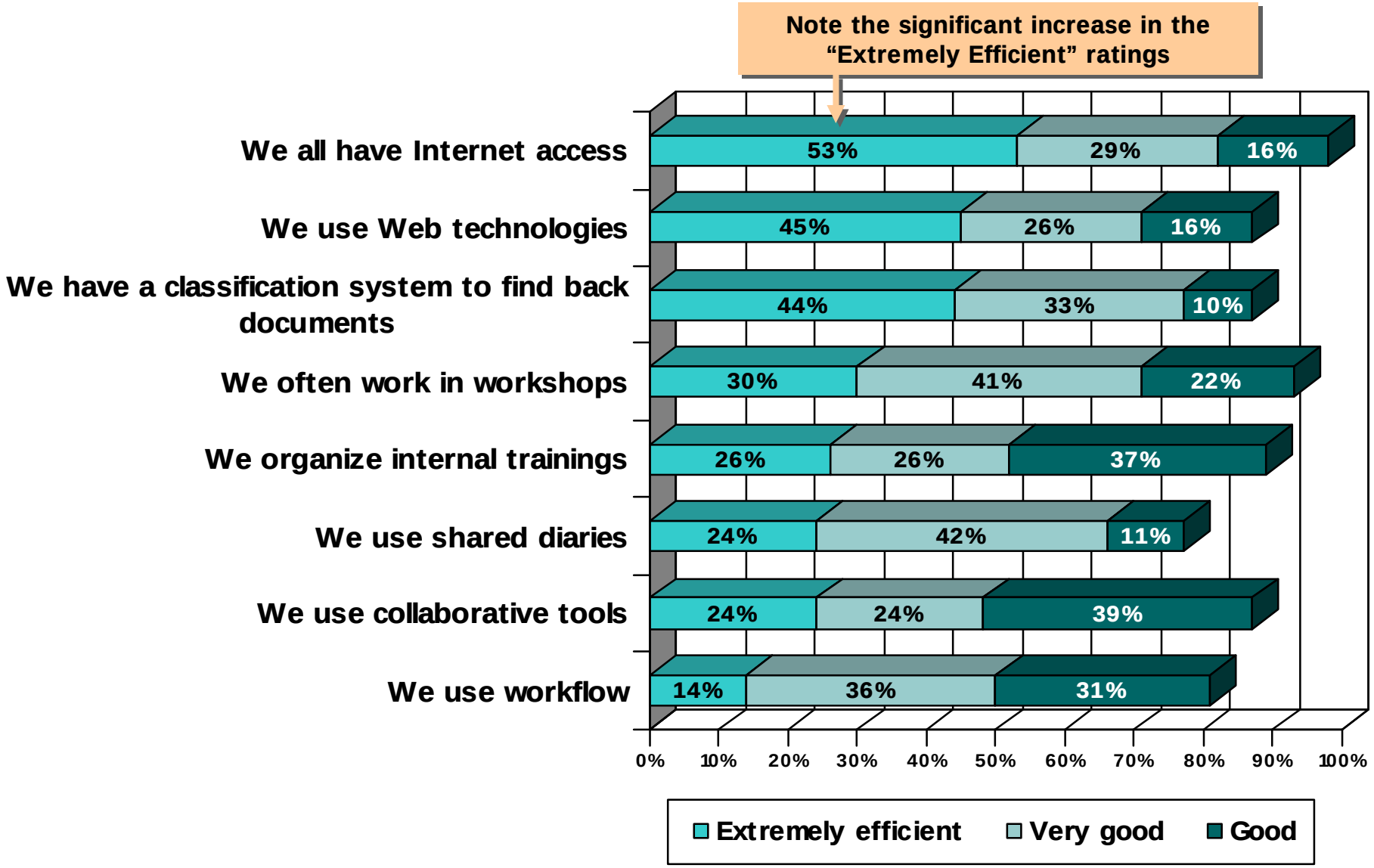
Source: 2003 EFC – King Baudouin Survey of 56 European Foundations, May 2004

Current Priorities in European Foundation Knowledge Management



Source: 2003 EFC – King Baudouin Survey of 56 European Foundations, May 2004

Future Priorities in European Foundation Knowledge Management



Source: 2003 EFC – King Baudouin Survey of 56 European Foundations, May 2004

Greatest Needs Expressed by Foundation Staff

- **“Our staff members classify and store information individually – everyone does it differently and there’s not a lot of sharing.”**
- **“We have lots of incomplete and duplicate information.”**
- **“Our paper files never stop growing – we need a way to archive and access historical information.”**
- **“We need to improve our systems, streamline our workflow, and operate more efficiently.”**
- **“Our systems aren’t well integrated – we have islands of information everywhere.”**

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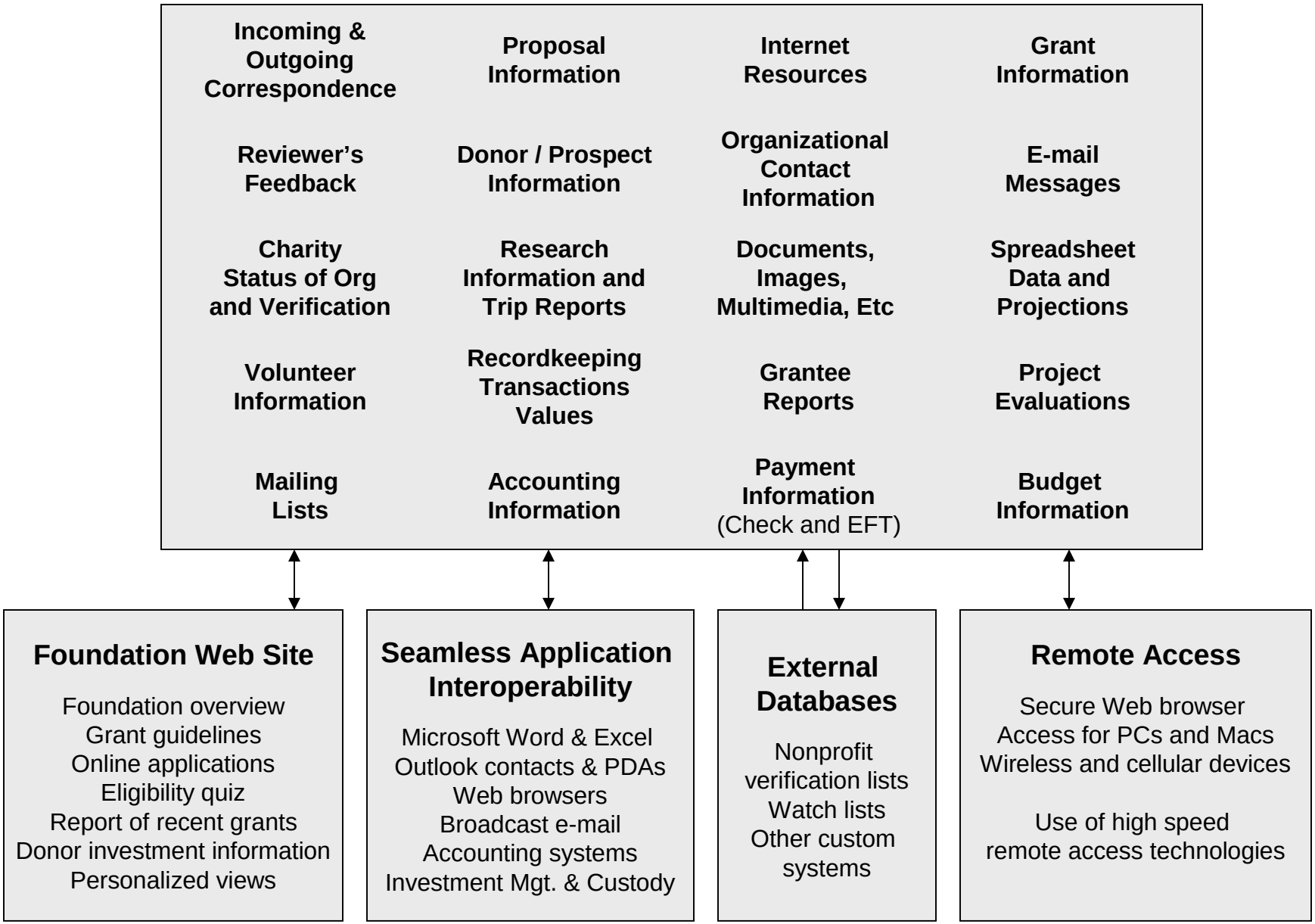
Islands of Information

Incoming & Outgoing Correspondence	**Proposal Information**	**Internet Resources**	**Grant Information**
Reviewer's Feedback	**Donor / Prospect Information**	**Organizational Contact Information**	**E-mail Messages**
Charity Status of Org and Verification	**Research Information and Trip Reports**	**Documents, Images, Multimedia, etc**	**Spreadsheet Data and Projections**
Volunteer Information	**Recordkeeping Transactions Values**	**Grantee Reports**	**Project Evaluations**
Mailing Lists	**Accounting Information**	**Payment Information** (Check and EFT)	**Budget Information**

A Fully Integrated Information System



Some Capabilities of the Best Grant / Project Management Systems

- **Easy and powerful searching**
- **User defined data classification**
- **Flexible reporting**
- **One-step mailmerge with Word and export to Excel**
- **Personalized interfaces for users and languages**
- **Synchronization with Outlook e-mail and contacts**
- **Built-in links to Internet based resources**
- **Contact management**
- **Document management**

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More Capabilities of the Best Grant / Project Management Systems

- **Customizable screens**
- **Links to Web sites**
- **Two-way links to databases and accounting packages**
- **Dynamic links to charity and watch list services**
- **Systems security and audit trails**
- **Online submission of proposals, and reports with automatic virus checking of all incoming files**
- **Secure remote Web-based system access**

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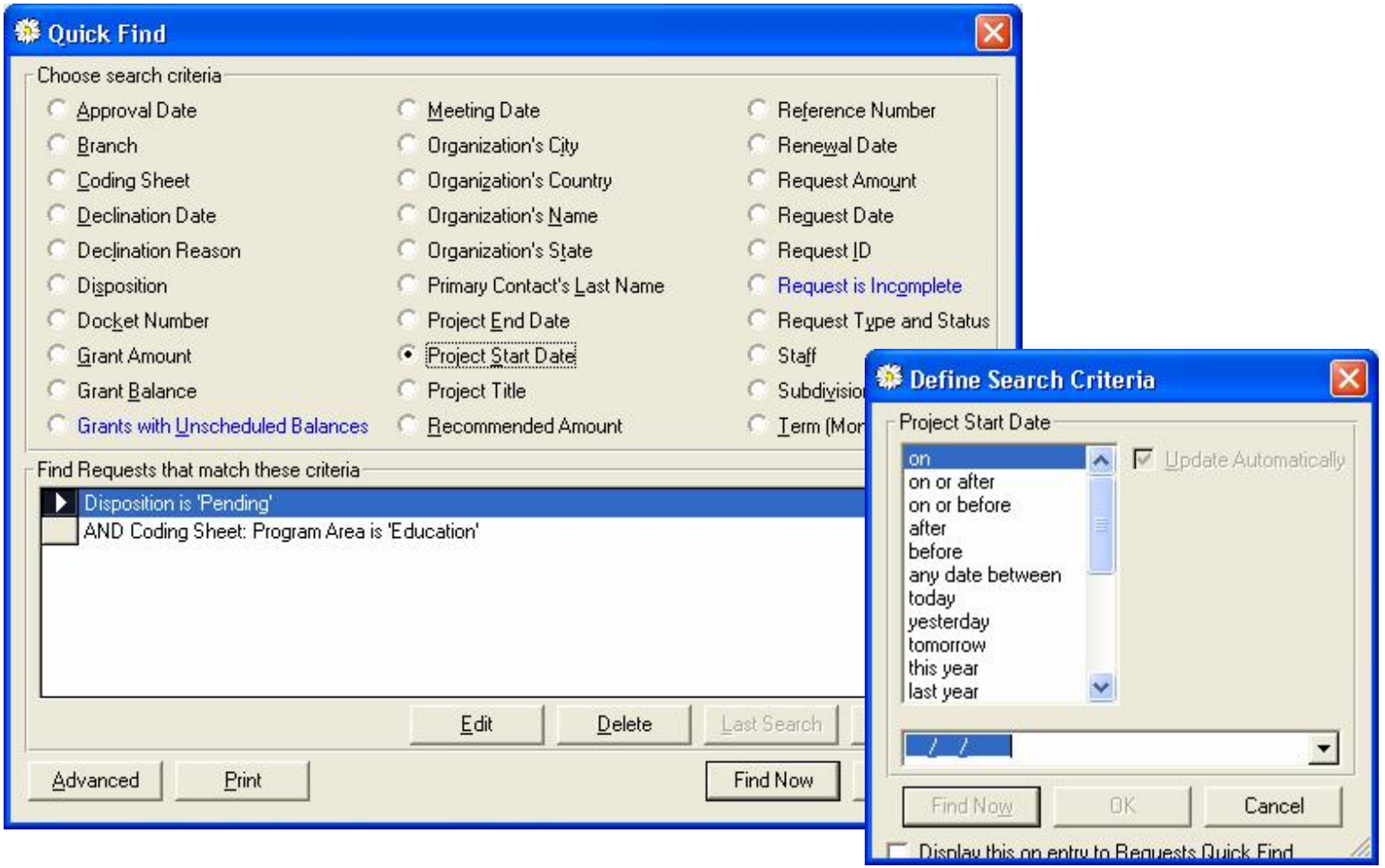
Searching for Information



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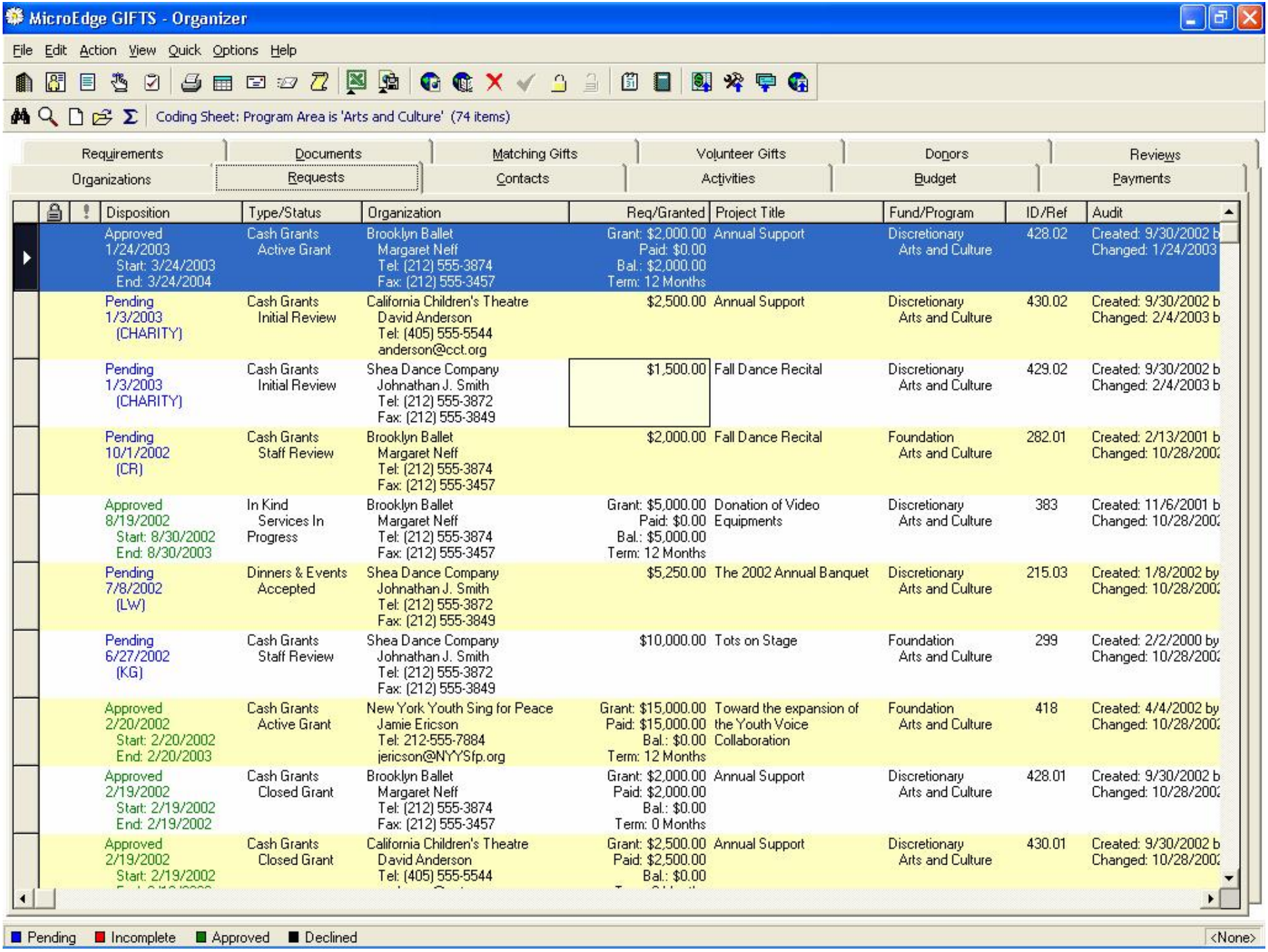
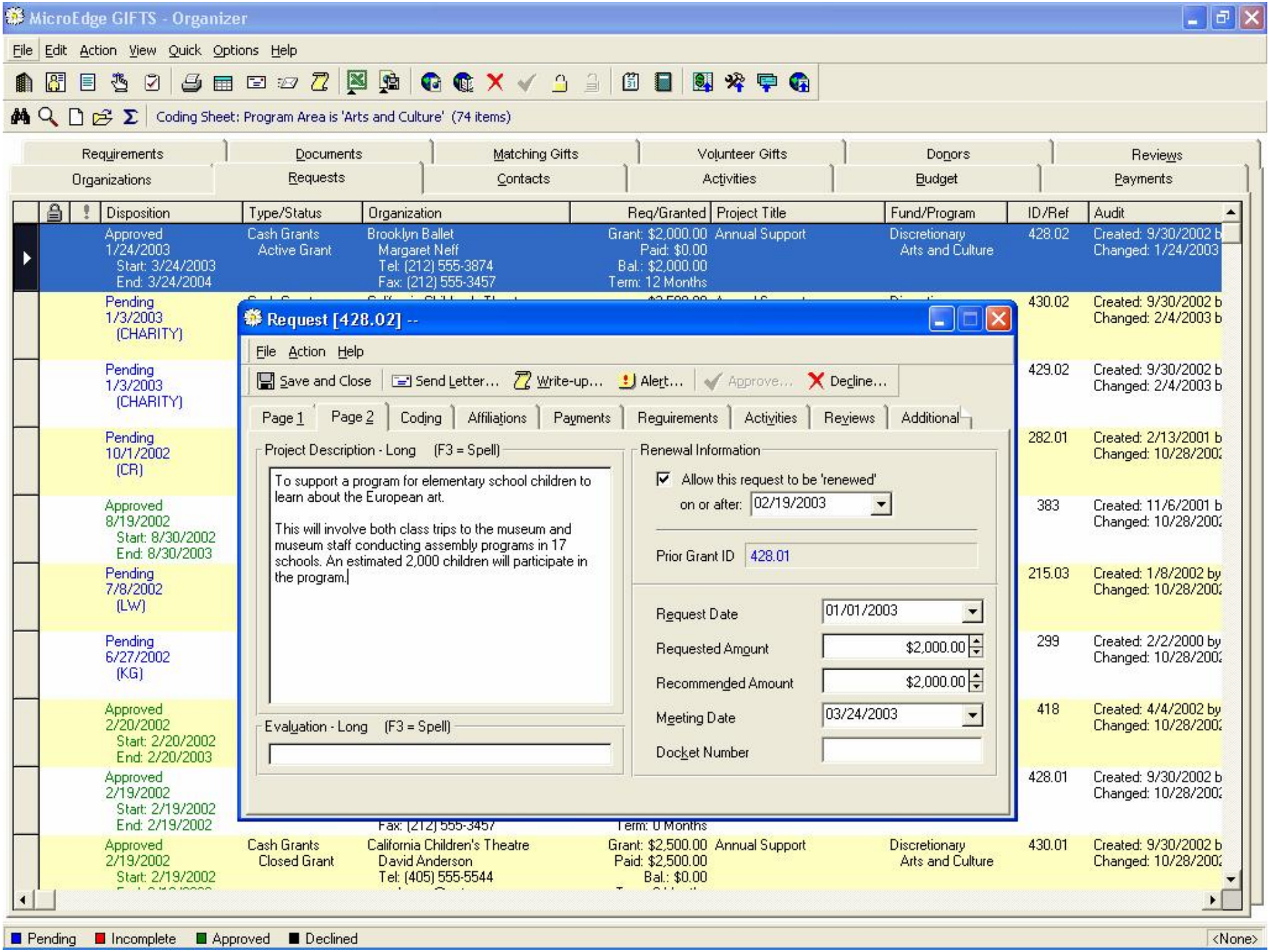
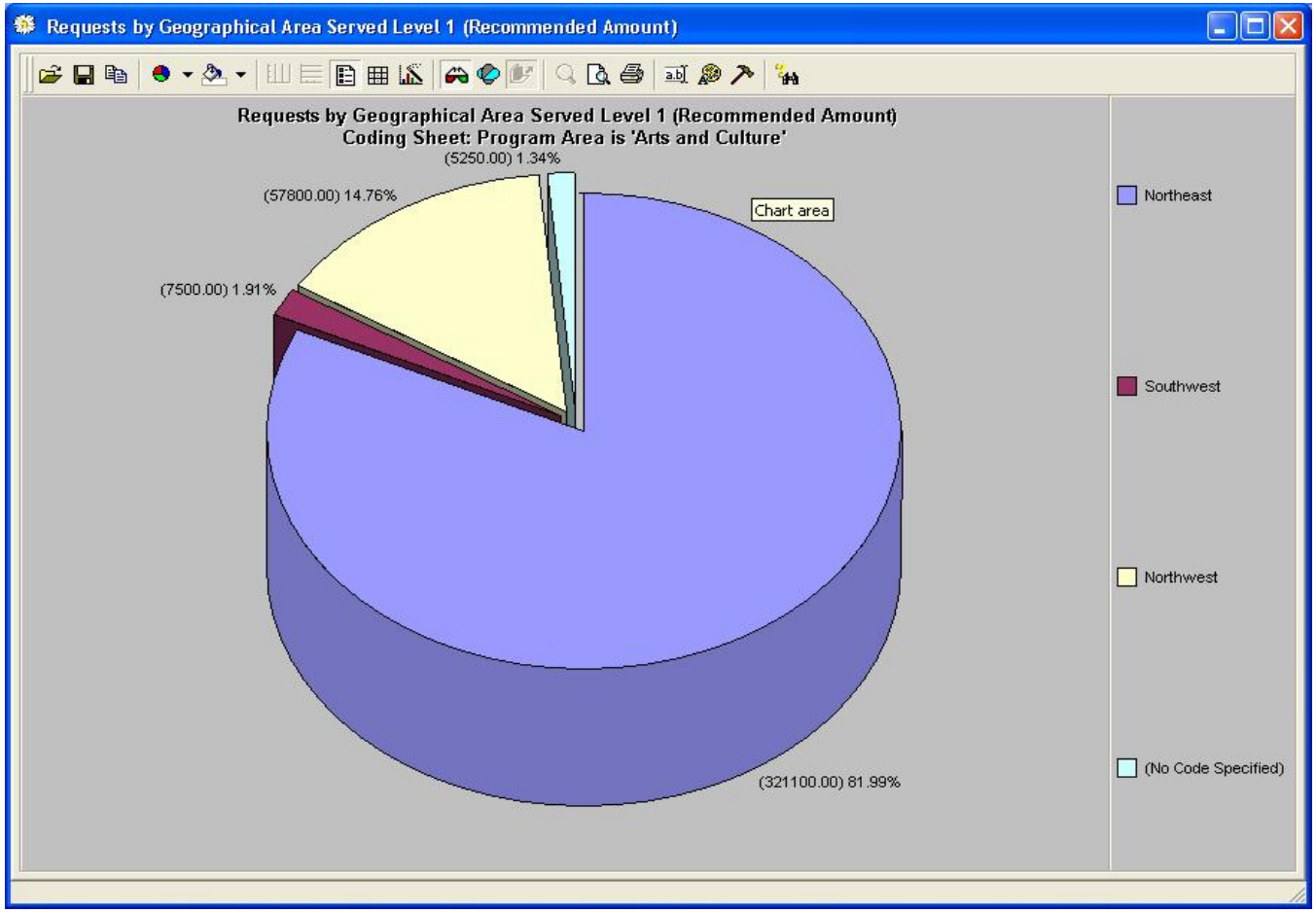

MicroEdge GIFTS - Organizer
File Edit Action View Quick Options Help
Coding Sheet: Program Area is 'Arts and Culture' (74 items)
Requirements
Documents
Matching Gifts
Volunteer Gifts
Donors
Reviews
Organizations
Requests
Contacts
Activities
Budget
Payments
Disposition
Type/Status
Organization
Req/Granted
Project Title
Fund/Program
ID/Ref
Audit
Approved 1/24/2003 Start: 3/24/2003 End: 3/24/2004
Cash Grants Active Grant
Brooklyn Ballet Margaret Neff Tel: (212) 555-3874 Fax: (212) 555-3457
Grant: $2,000.00 Paid: $0.00 Bal.: $2,000.00 Term: 12 Months
Annual Support
Discretionary Arts and Culture
428.02
Created: 9/30/2002 b Changed: 1/24/2003
Pending 1/3/2003 (CHARITY)
Cash Grants Initial Review
California Children's Theatre David Anderson Tel: (405) 555-5544 anderson@cct.org
$2,500.00
Annual Support
Discretionary Arts and Culture
430.02
Created: 9/30/2002 b Changed: 2/4/2003 b
Pending 1/3/2003 (CHARITY)
Cash Grants Initial Review
Shea Dance Company Johnathan J. Smith Tel: (212) 555-3872 Fax: (212) 555-3849
$1,500.00
Fall Dance Recital
Discretionary Arts and Culture
429.02
Created: 9/30/2002 b Changed: 2/4/2003 b
Pending 10/1/2002 (CR)
Cash Grants Staff Review
Brooklyn Ballet Margaret Neff Tel: (212) 555-3874 Fax: (212) 555-3457
$2,000.00
Fall Dance Recital
Foundation Arts and Culture
282.01
Created: 2/13/2001 b Changed: 10/28/200
Approved 8/19/2002 Start: 8/30/2002 End: 8/30/2003
In Kind Services In Progress
Brooklyn Ballet Margaret Neff Tel: (212) 555-3874 Fax: (212) 555-3457
Grant: $5,000.00 Paid: $0.00 Bal.: $5,000.00 Term: 12 Months
Donation of Video Equipments
Discretionary Arts and Culture
383
Created: 11/6/2001 b Changed: 10/28/200
Pending 7/8/2002 (LW)
Dinners & Events Accepted
Shea Dance Company Johnathan J. Smith Tel: (212) 555-3872 Fax: (212) 555-3849
$5,250.00
The 2002 Annual Banquet
Discretionary Arts and Culture
215.03
Created: 1/8/2002 by Changed: 10/28/200
Pending 6/27/2002 (KG)
Cash Grants Staff Review
Shea Dance Company Johnathan J. Smith Tel: (212) 555-3872 Fax: (212) 555-3849
$10,000.00
Tots on Stage
Foundation Arts and Culture
299
Created: 2/2/2000 by Changed: 10/28/200
Approved 2/20/2002 Start: 2/20/2002 End: 2/20/2003
Cash Grants Active Grant
New York Youth Sing for Peace Jamie Ericson Tel: 212-555-7884 jericson@NYYSfp.org
Grant: $15,000.00 Paid: $15,000.00 Bal.: $0.00 Term: 12 Months
Toward the expansion of the Youth Voice Collaboration
Foundation Arts and Culture
418
Created: 4/4/2002 by Changed: 10/28/200
Approved 2/19/2002 Start: 2/19/2002 End: 2/19/2002
Cash Grants Closed Grant
Brooklyn Ballet Margaret Neff Tel: (212) 555-3874 Fax: (212) 555-3457
Grant: $2,000.00 Paid: $2,000.00 Bal.: $0.00 Term: 0 Months
Annual Support
Discretionary Arts and Culture
428.01
Created: 9/30/2002 b Changed: 10/28/200
Approved 2/19/2002 Start: 2/19/2002
Cash Grants Closed Grant
California Children's Theatre David Anderson Tel: (405) 555-5544
Grant: $2,500.00 Paid: $2,500.00 Bal.: $0.00
Annual Support
Discretionary Arts and Culture
430.01
Created: 9/30/2002 b Changed: 10/28/200
Pending
Incomplete
Approved
Declined
<None>


MicroEdge GIFTS - Organizer
File Edit Action View Quick Options Help
Coding Sheet: Program Area is 'Arts and Culture' (74 items)
Requirements Documents Matching Gifts Volunteer Gifts Donors Reviews
Organizations Requests Contacts Activities Budget Payments
Disposition Type/Status Organization Req/Granted Project Title Fund/Program ID/Ref Audit
Approved 1/24/2003 Start: 3/24/2003 End: 3/24/2004
Cash Grants Active Grant
Brooklyn Ballet Margaret Neff Tel: (212) 555-3874 Fax: (212) 555-3457
Grant: $2,000.00 Paid: $0.00 Bal.: $2,000.00 Term: 12 Months
Annual Support
Discretionary Arts and Culture
428.02
Created: 9/30/2002 b Changed: 1/24/2003
Pending 1/3/2003 (CHARITY)
430.02
Created: 9/30/2002 b Changed: 2/4/2003 b
Pending 1/3/2003 (CHARITY)
429.02
Created: 9/30/2002 b Changed: 2/4/2003 b
Pending 10/1/2002 (CR)
282.01
Created: 2/13/2001 b Changed: 10/28/200
Approved 8/19/2002 Start: 8/30/2002 End: 8/30/2003
383
Created: 11/6/2001 b Changed: 10/28/200
Pending 7/8/2002 (LW)
215.03
Created: 1/8/2002 by Changed: 10/28/200
Pending 6/27/2002 (KG)
299
Created: 2/2/2000 by Changed: 10/28/200
Approved 2/20/2002 Start: 2/20/2002 End: 2/20/2003
418
Created: 4/4/2002 by Changed: 10/28/200
Approved 2/19/2002 Start: 2/19/2002 End: 2/19/2002
428.01
Created: 9/30/2002 b Changed: 10/28/200
Fax: (212) 555-3457
Term: 0 Months
Approved 2/19/2002 Start: 2/19/2002
Cash Grants Closed Grant
California Children's Theatre David Anderson Tel: (405) 555-5544
Grant: $2,500.00 Paid: $2,500.00 Bal.: $0.00
Annual Support
Discretionary Arts and Culture
430.01
Created: 9/30/2002 b Changed: 10/28/200
Request [428.02] --
File Action Help
Save and Close Send Letter... Write-up... Alert... Approve... Decline...
Page 1 Page 2 Coding Affiliations Payments Requirements Activities Reviews Additional
Project Description - Long (F3 = Spell)
To support a program for elementary school children to learn about the European art.
This will involve both class trips to the museum and museum staff conducting assembly programs in 17 schools. An estimated 2,000 children will participate in the program.
Evaluation - Long (F3 = Spell)
Renewal Information
Allow this request to be 'renewed'
on or after: 02/19/2003
Prior Grant ID 428.01
Request Date 01/01/2003
Requested Amount $2,000.00
Recommended Amount $2,000.00
Meeting Date 03/24/2003
Docket Number
Pending Incomplete Approved Declined
<None>

Representing Information in Useful Ways



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Top 20 Grants by Grant Amount

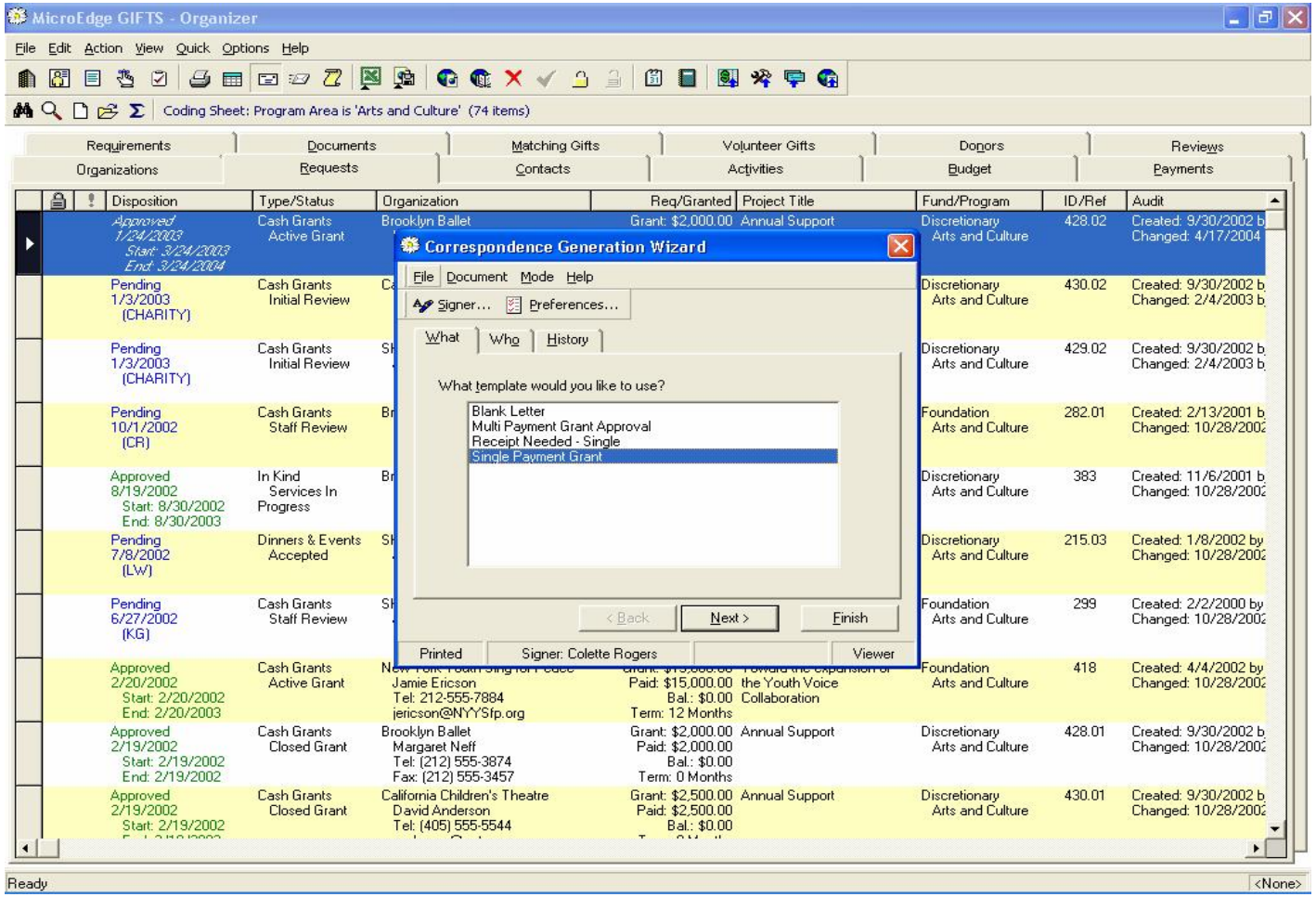
1 of 1+ 100% Total:351 100% 351 of 351

Top 20 Grants by Grant Amount

4/17/2004

Grant Amount	Organization Project Description	Grant Date	Paid To Date
$ 500,000.00	**Hiller State University** Boston, MA *Undergraduate scholarship program*	12/7/1999	$500,000.00
$ 500,000.00	**The Children's Fund** Washington, DC *Toward support of outreach program for at-risk teens in collaboration with Public/Private Ventures and the Boys & Girls Clubs of DC*	8/20/2002	$0.00
$ 250,000.00	**American Foundation for Children** New York, NY *Funding for new daycare center*	12/21/1999	$250,000.00
$ 250,000.00	**Sunflower House for Youth in Distress** San Francisco, CA *The construction of a new halfway house for pregnant teens*	6/3/1996	$250,000.00
$ 235,000.00	**Kids With AIDS Research Center** New York, NY *Camp Hope Summer Program*	6/9/1998	$235,000.00
$ 154,500.00	**Ryan School of Medicine** Los Angeles, CA *The support of the "Charles S. Godin" Scholarship program*	6/8/1999	$154,500.00
$ 150,000.00	**Ryan School of Medicine** Los Angeles, CA *The establishment of the "Charles S. Godin" Scholarship program*	6/9/1998	$150,000.00
$ 150,000.00	**American Foundation for Children** New York, NY	3/21/1996	$150,000.00

Merging Data with Microsoft Word



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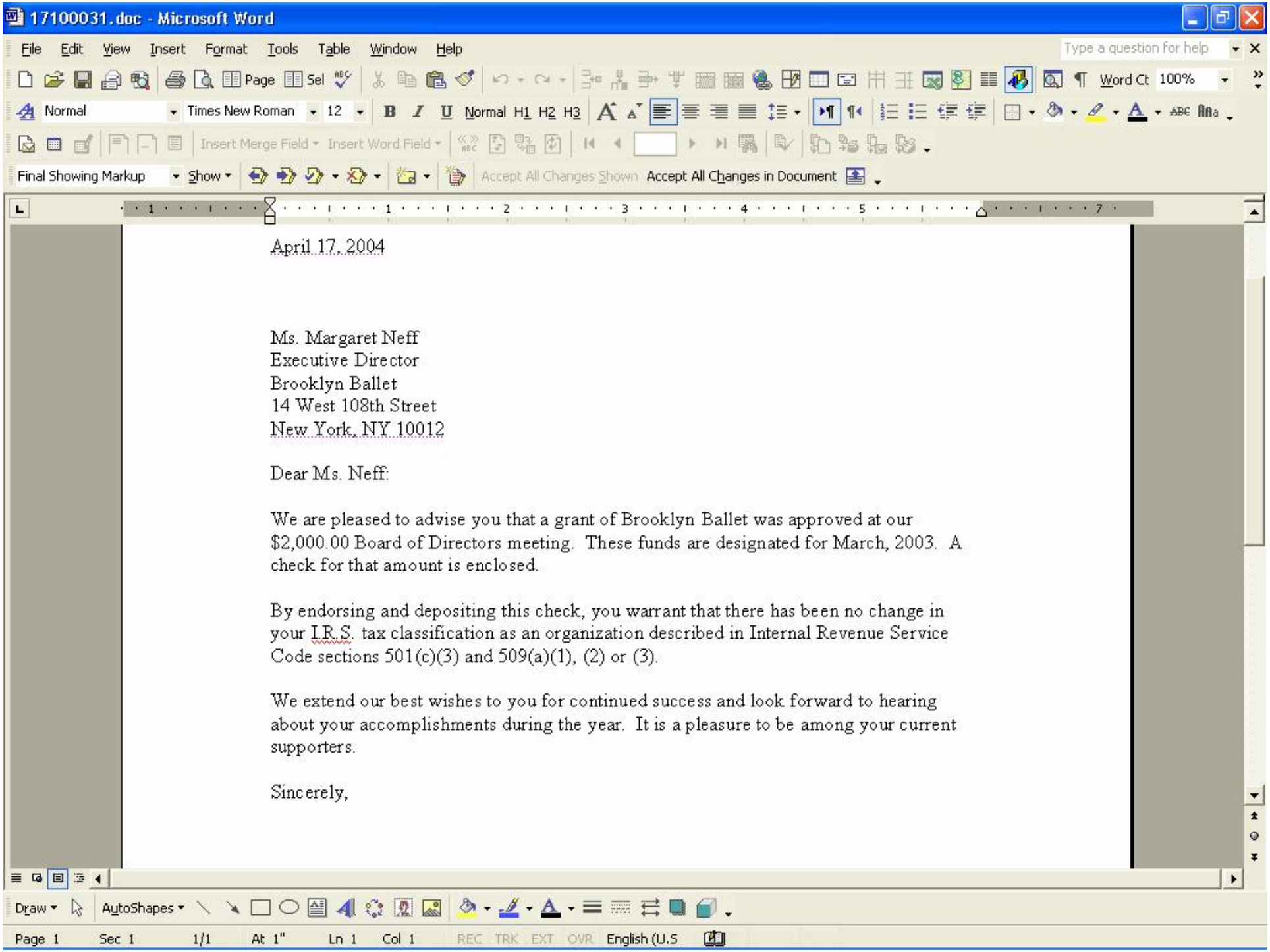
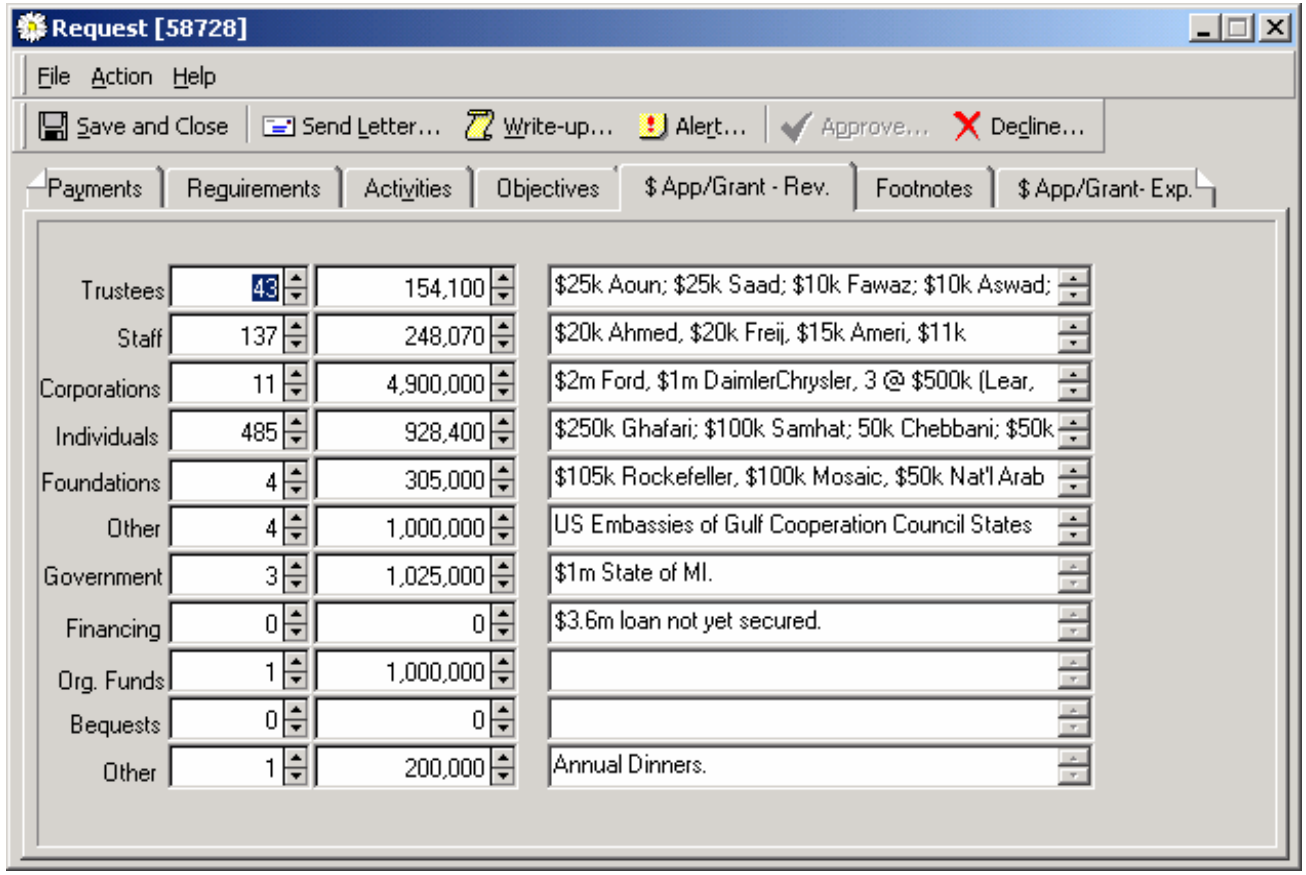

17100031.doc - Microsoft Word
File Edit View Insert Format Tools Table Window Help
Type a question for help
Word Ct 100%
Normal Times New Roman 12
Final Showing Markup Show
Accept All Changes Shown Accept All Changes in Document
April 17, 2004
Ms. Margaret Neff
Executive Director
Brooklyn Ballet
14 West 108th Street
New York, NY 10012
Dear Ms. Neff:
We are pleased to advise you that a grant of Brooklyn Ballet was approved at our $2,000.00 Board of Directors meeting. These funds are designated for March, 2003. A check for that amount is enclosed.
By endorsing and depositing this check, you warrant that there has been no change in your I.R.S. tax classification as an organization described in Internal Revenue Service Code sections 501(c)(3) and 509(a)(1), (2) or (3).
We extend our best wishes to you for continued success and look forward to hearing about your accomplishments during the year. It is a pleasure to be among your current supporters.
Sincerely,
Draw AutoShapes
Page 1 Sec 1 1/1 At 1" Ln 1 Col 1 REC TRK EXT OVR English (U.S

User Defined Screen Design to Collect Key Information



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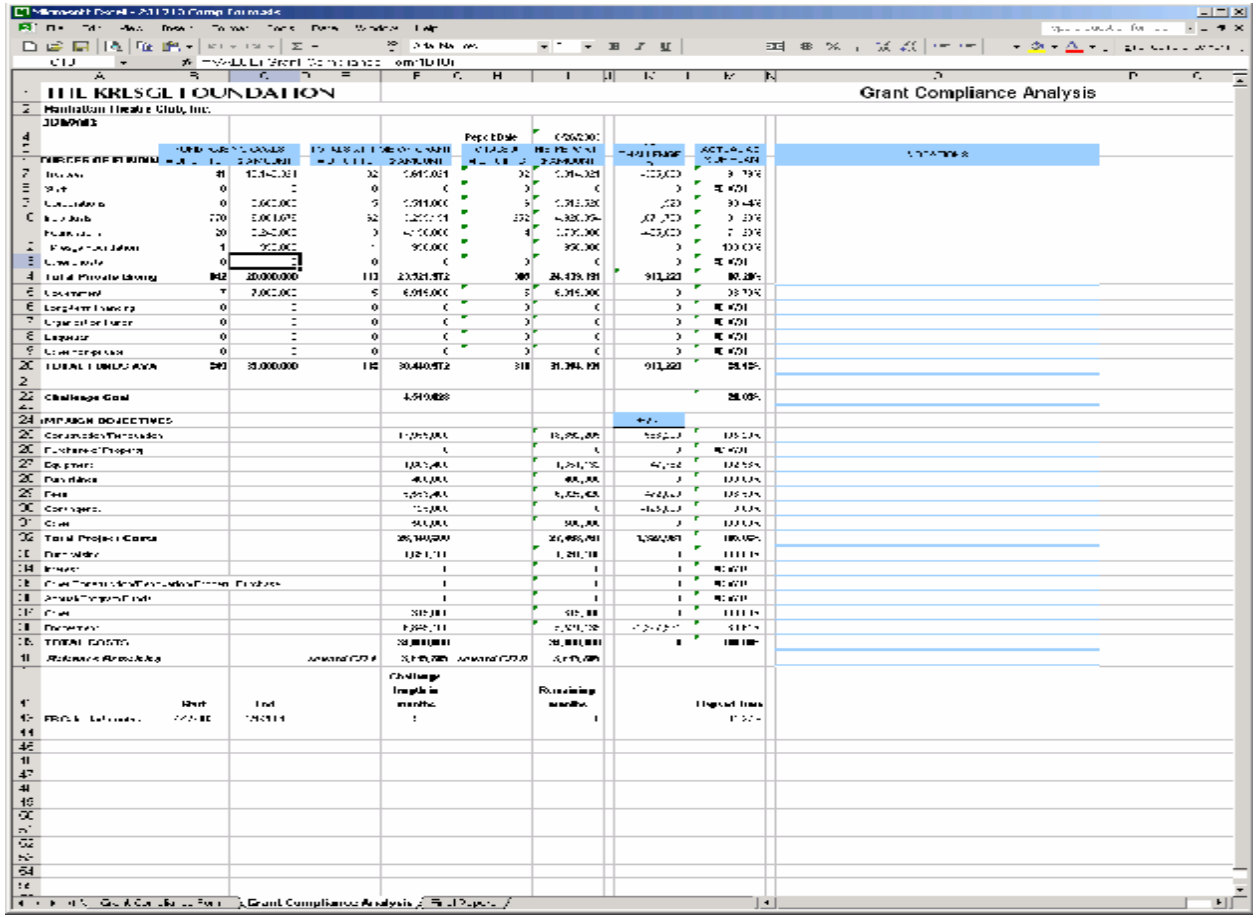
Export to Excel for Data Analysis and Decision-Making



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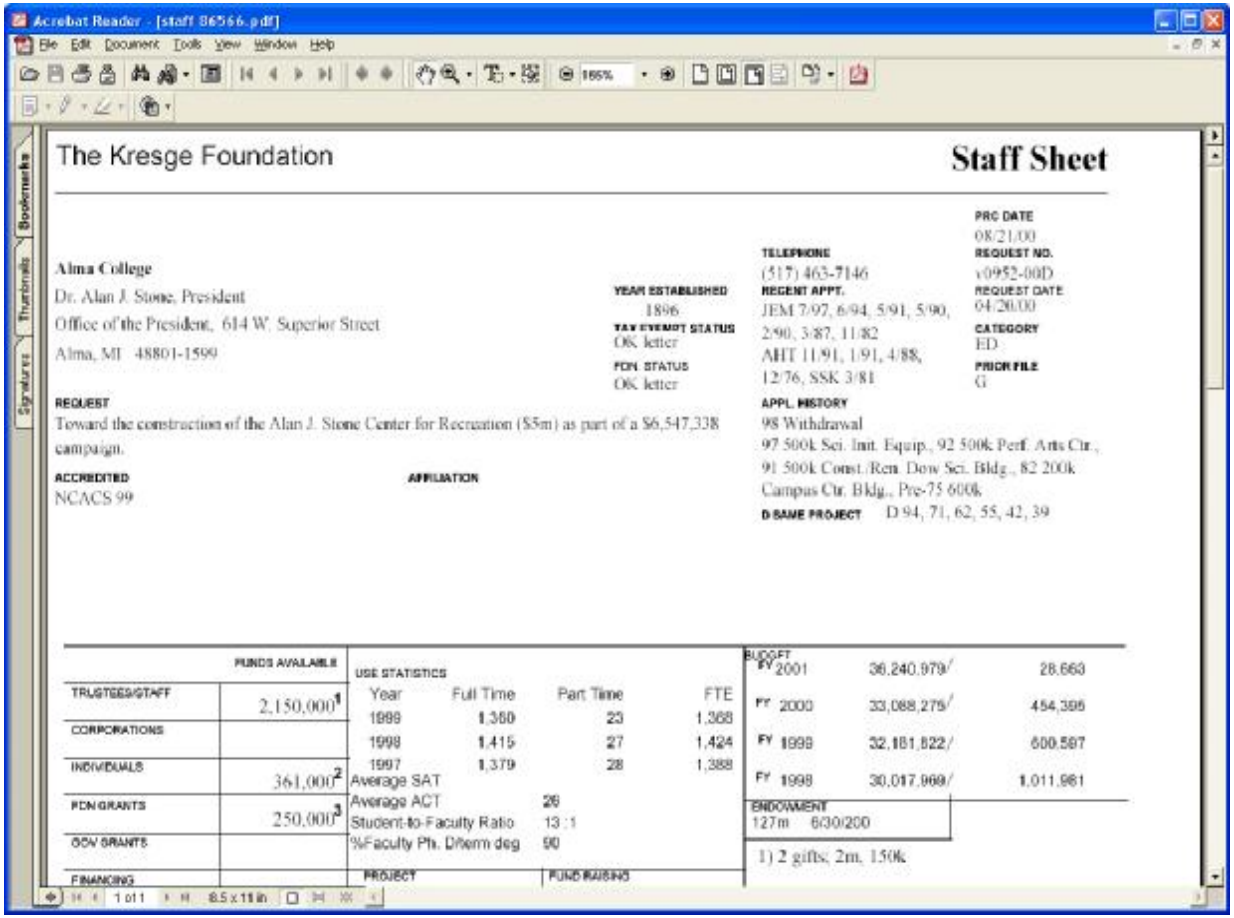
Converting Historical Documents into Searchable PDF Files



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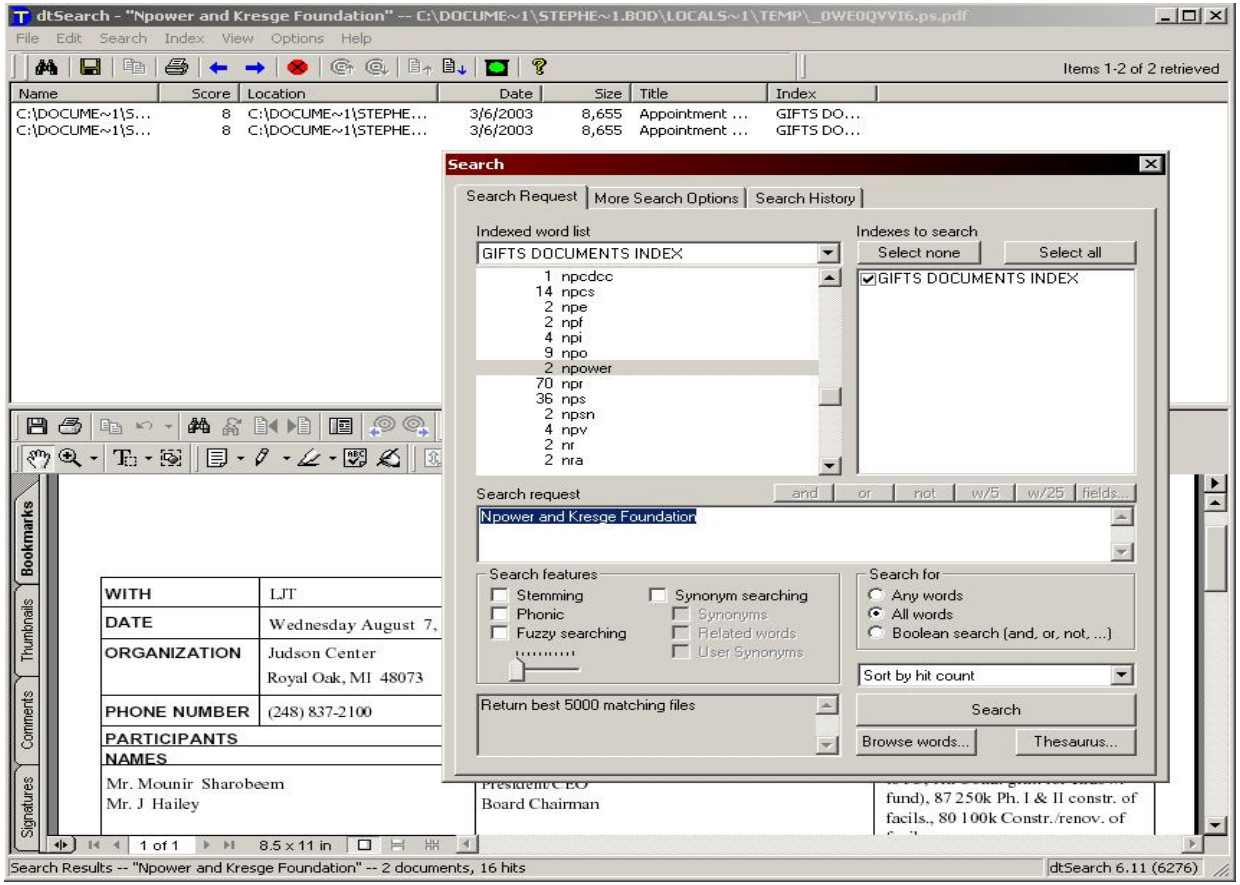
Searching Catalogued Files in Multiple Formats



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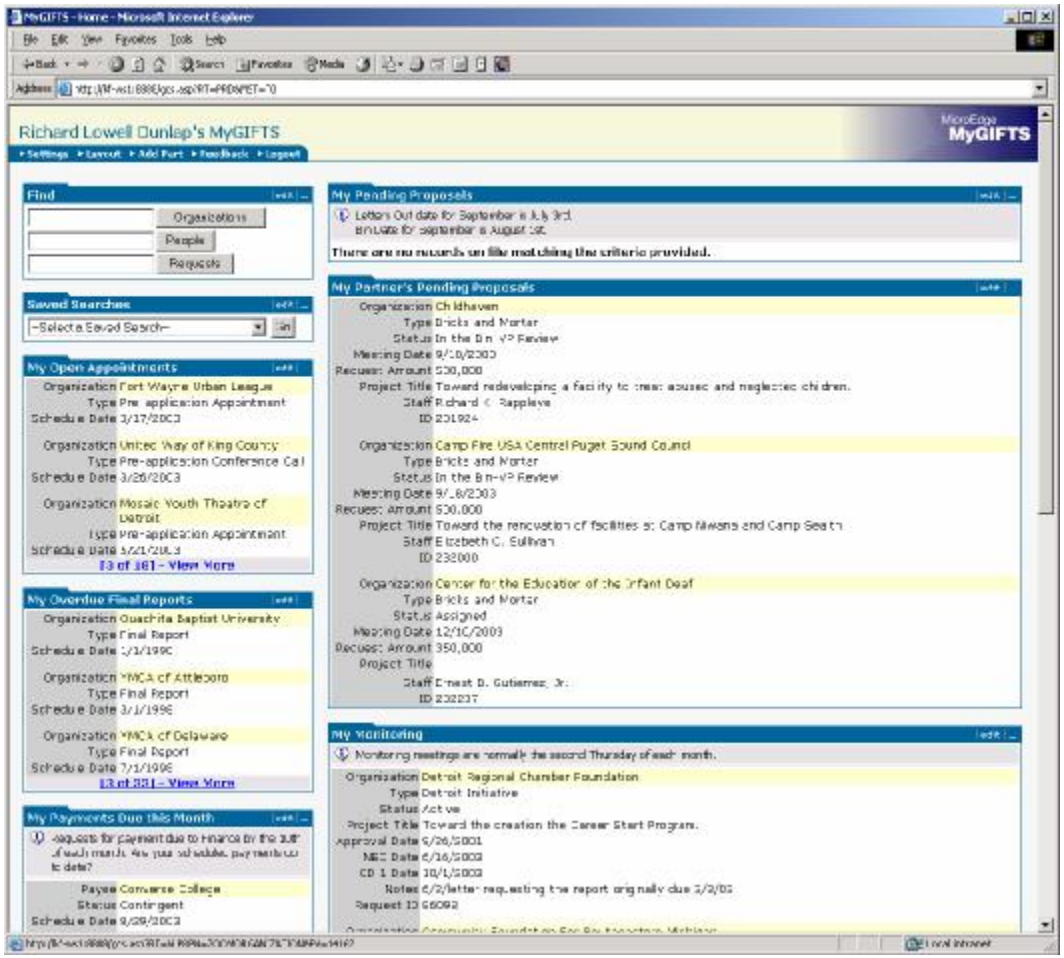
Personalized Information Presented via the Web and on Handheld Devices



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FOUNDATION FOR THE National Institutes of Health

Grand Challenges in Global Health

- **$200 million grant program**
- **Each grant up to $20 million**
- **1517 online applications received from scientists in 75 different countries**
- **Over 1,400 organizations**
  Over 8,000 investigators and collaborators
  Over 200 reviewers from 75 countries
  Over 15,000 proposal documents & spreadsheets
  Over 6,000 online reviews
  Over 1,500 face-to-face panel reviews
- **Complex information processing, knowledge management, and decision-making requirements**
- **www.gcgh.org**

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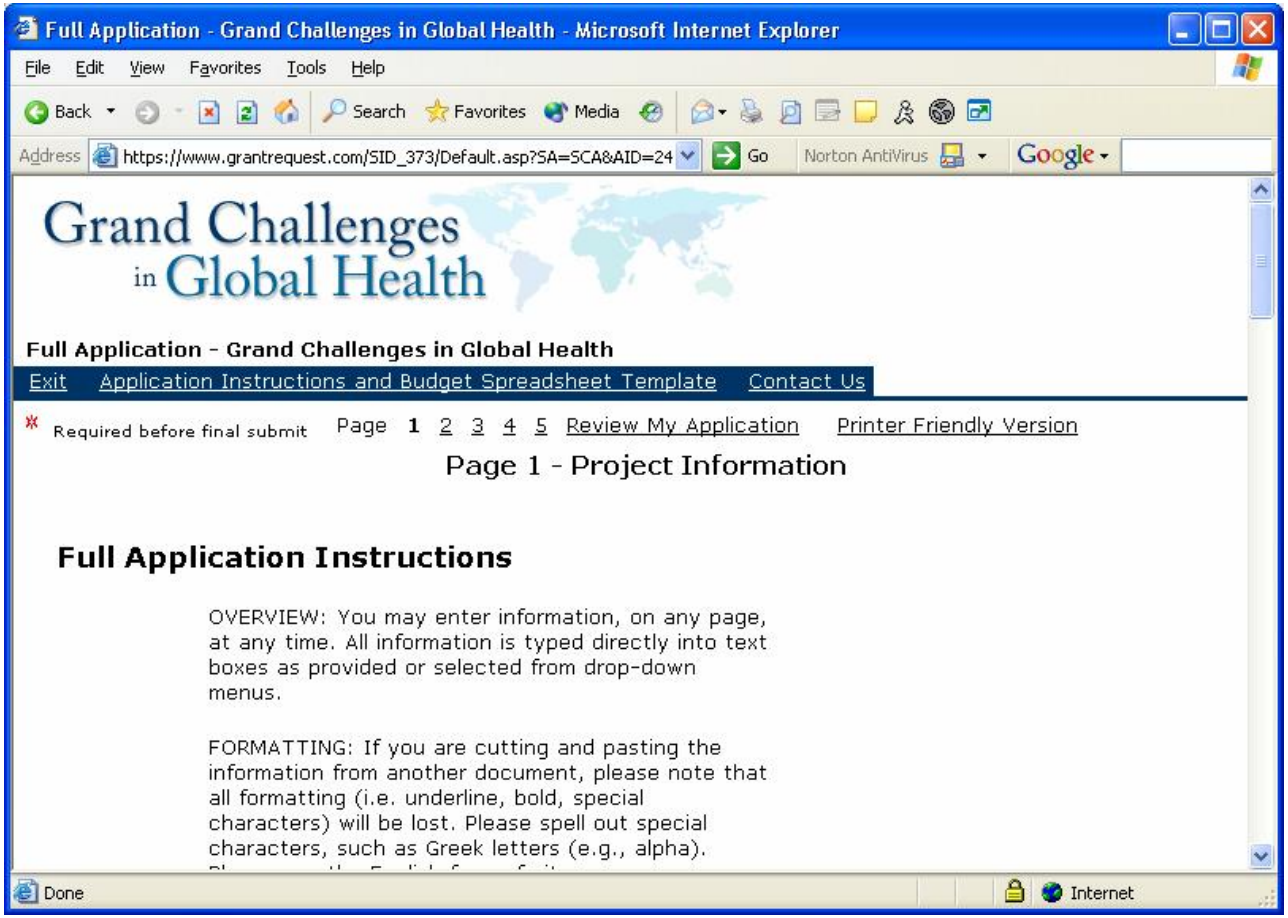
Use of Web-based Application Forms



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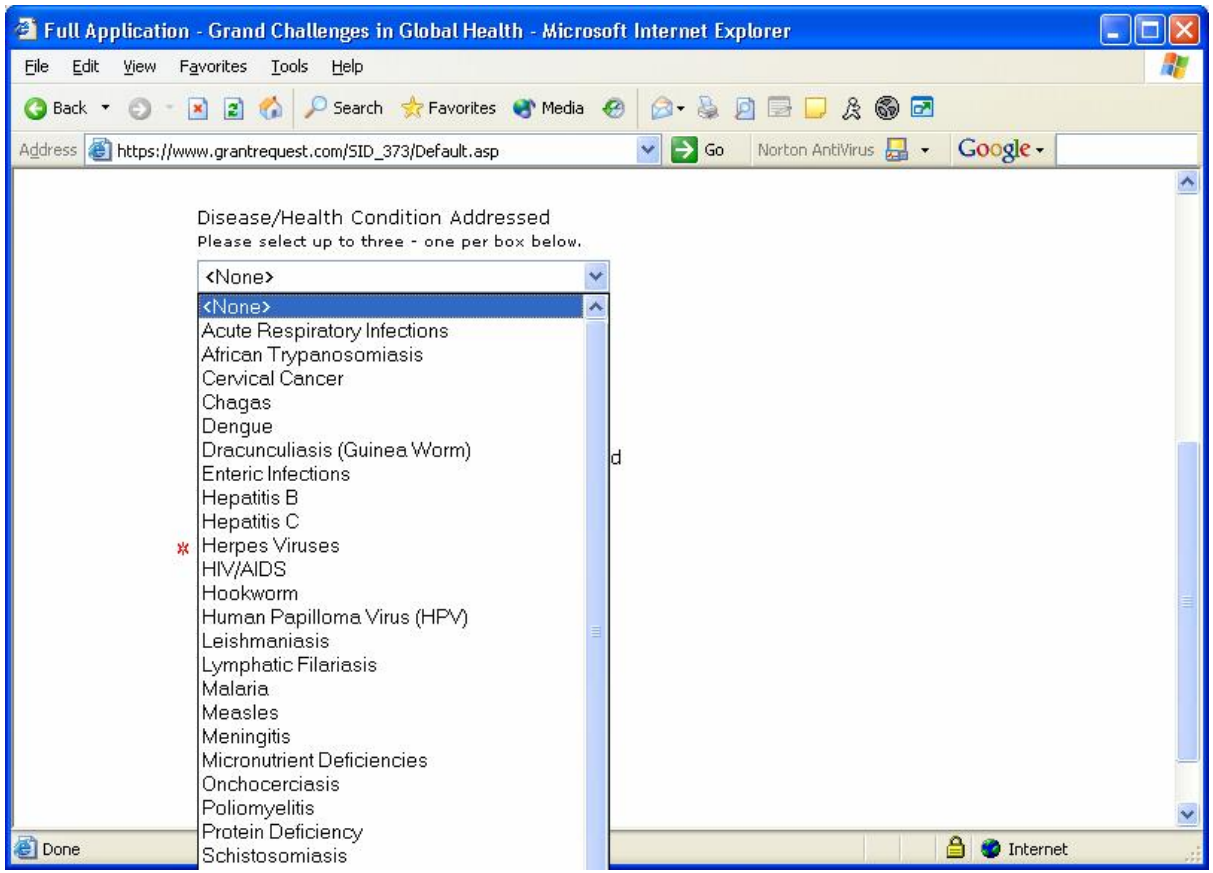
Standardizing Classifications to Enable Searching and Reporting



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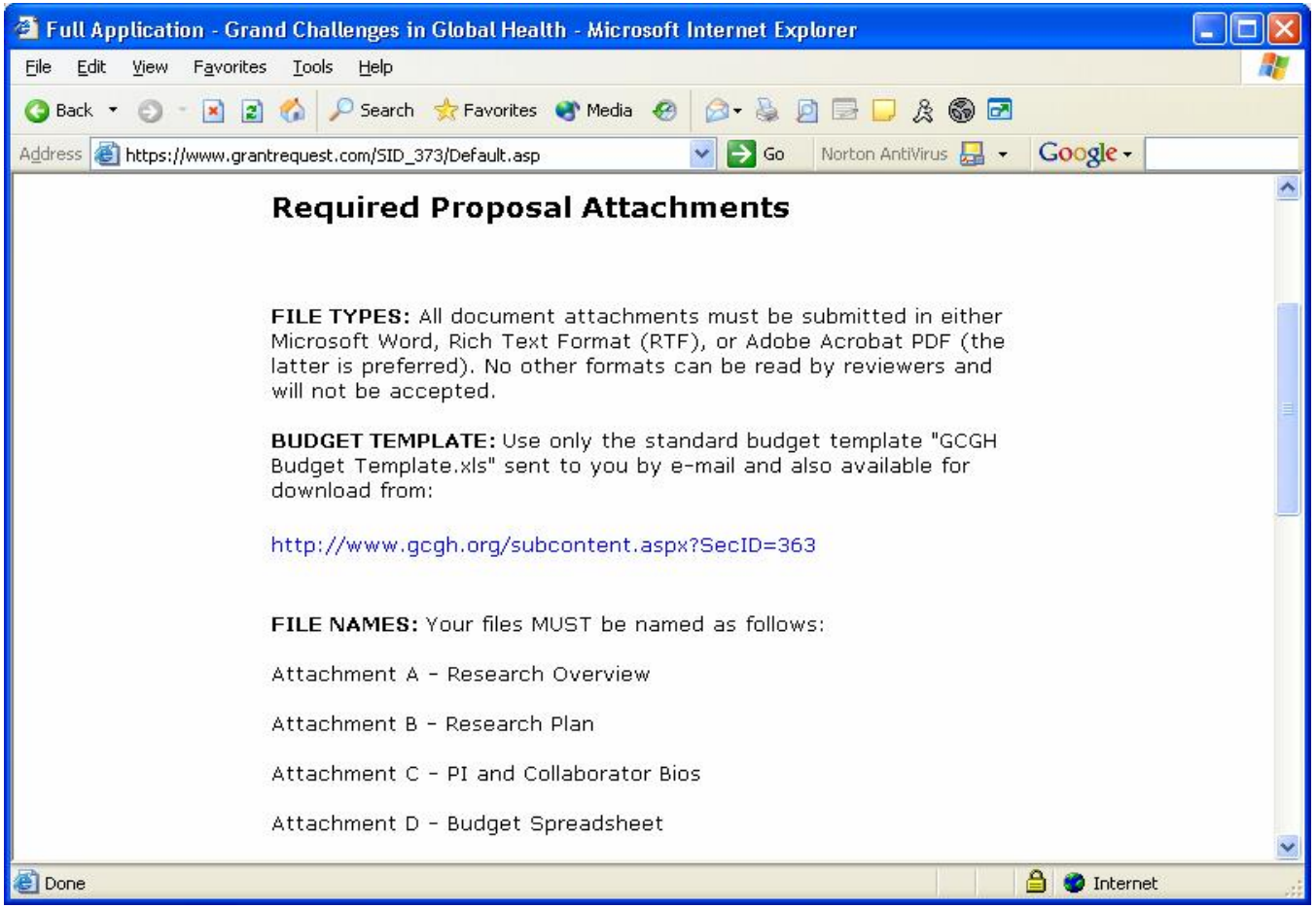
Establishing Standards Through the Use of Templates



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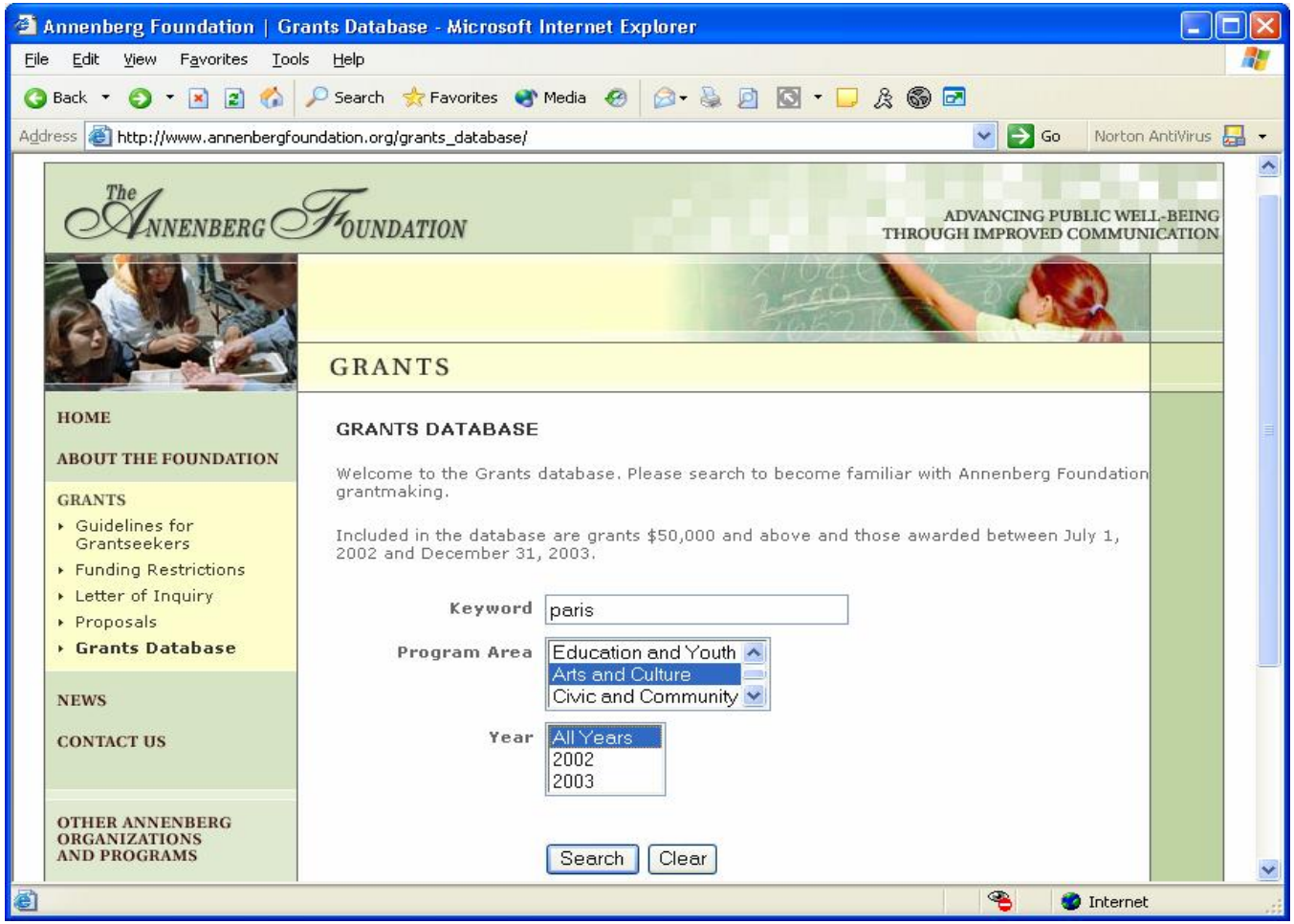
Linking Systems to Maintain Your Web Site Up-to-date



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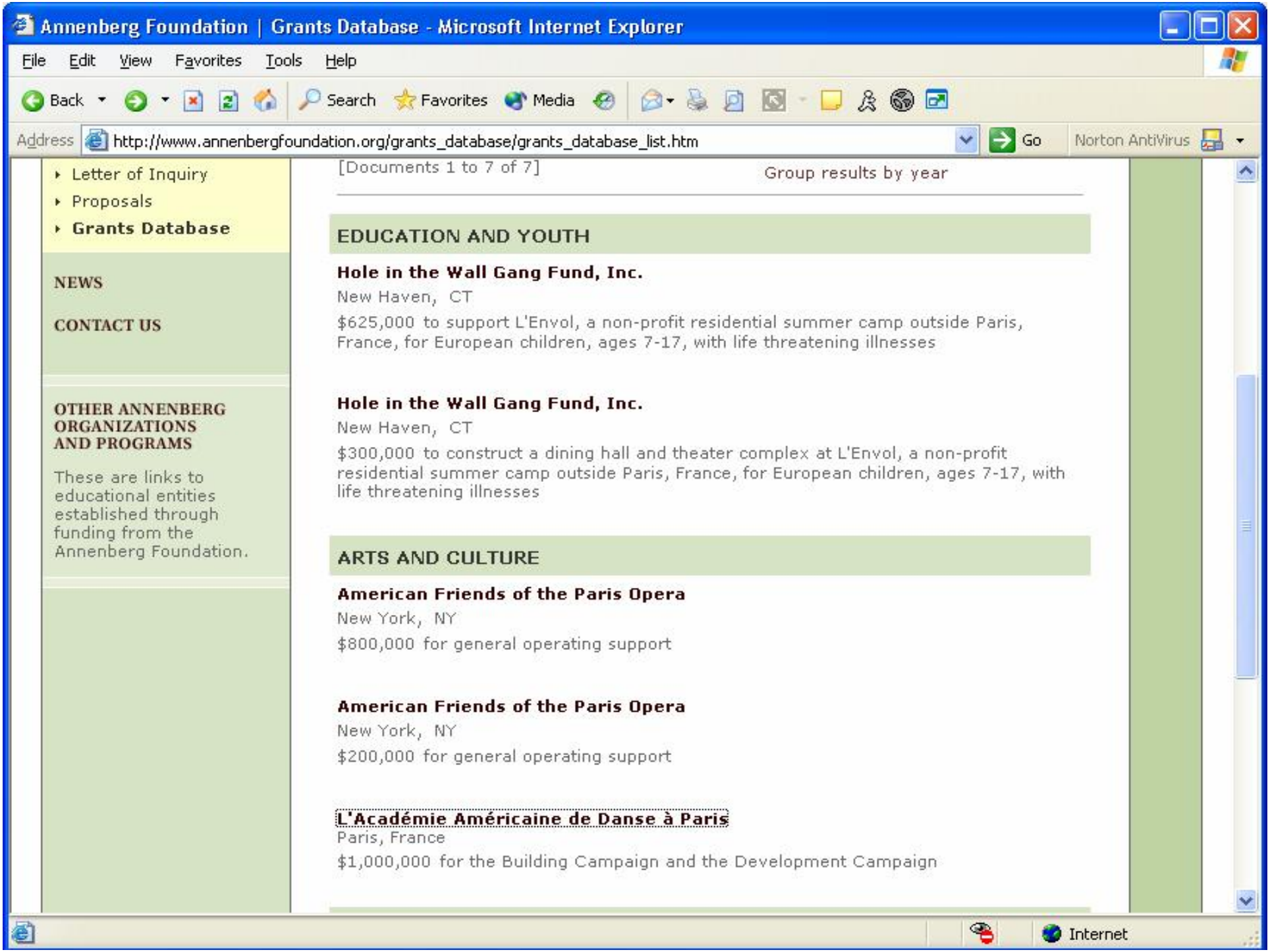
Annenberg Foundation | Grants Database - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://www.annenbergfoundation.org/grants_database/grants_database_list.htm
Go
Norton AntiVirus
Letter of Inquiry
Proposals
Grants Database
NEWS
CONTACT US
OTHER ANNENBERG ORGANIZATIONS AND PROGRAMS
These are links to educational entities established through funding from the Annenberg Foundation.
[Documents 1 to 7 of 7]
Group results by year
EDUCATION AND YOUTH
Hole in the Wall Gang Fund, Inc.
New Haven, CT
$625,000 to support L'Envol, a non-profit residential summer camp outside Paris, France, for European children, ages 7-17, with life threatening illnesses
Hole in the Wall Gang Fund, Inc.
New Haven, CT
$300,000 to construct a dining hall and theater complex at L'Envol, a non-profit residential summer camp outside Paris, France, for European children, ages 7-17, with life threatening illnesses
ARTS AND CULTURE
American Friends of the Paris Opera
New York, NY
$800,000 for general operating support
American Friends of the Paris Opera
New York, NY
$200,000 for general operating support
L'Académie Américaine de Danse à Paris
Paris, France
$1,000,000 for the Building Campaign and the Development Campaign
Internet

Annenberg Foundation | Grants Database | L'Académie Américaine de Danse à Paris - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Media

Address http://www.annenbergfoundation.org/grants_database/grants_database_show.htm?doc_id=212612&searchstring=p Go Norton AntiVirus

The Annenberg Foundation

ADVANCING PUBLIC WELL-BEING
THROUGH IMPROVED COMMUNICATION

GRANTS

HOME

ABOUT THE FOUNDATION

GRANTS
- Guidelines for Grantseekers
- Funding Restrictions
- Letter of Inquiry
- Proposals
- **Grants Database**

NEWS

CONTACT US

OTHER ANNENBERG ORGANIZATIONS AND PROGRAMS

GRANTS DATABASE

print this page email this page

L'Académie Américaine de Danse à Paris

$1,000,000 for the Building Campaign and the Development Campaign

Program Area(s): Arts and Culture
Date Awarded: April 2003 (FY 2003)
More Information: http://www.danceparis.com

Back to top

Back to search results | Start new search

Internet

L'Académie Américaine de Danse à Paris - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Media

Address http://www.danceparis.com/danse.html Go Norton AntiVirus

L' Académie Américaine de Danse à Paris

CENTRE DE DANSE BILINGUE

Année Scolaire
Les Différentes Sections
Programme
Participations Possibles à des Spectacles
Corps Enseignant
Vacances et Jours Fériés
Paiement des Cours
Vérifiez les nouveautés et les dates des ateliers

Année Scolaire

SITE - JD GRAPHEX

Les élèves peuvent s'inscrire à l'AADP tout au long de l'année scolaire dans la limite des places disponibles dans les sections qui leur correspondent. L'année scolaire commence traditionnellement en septembre et se termine en juin. Elle est ponctuée par des interruptions correspondant aux vacances scolaires françaises. Afin de déterminer leur niveau d'admission, les élèves de plus de dix ans doivent participer à une audition informelle supervisée par la directrice de l'école.

Done Internet

Selecting Information Systems for European Foundations

- **Language of the user interface**
- **Fits your particular type of foundation operation**
- **Ease of use and flexibility**
- **Level of integration with Microsoft Office, E-mail, the Web and accounting systems**
- **Capability to publish data on the Web**
- **Multi-currency support and conversion**
- **Commercially available product, not a custom one-of-a-kind system**

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Key Questions to Ask When Choosing Vendors

1. **Is the product available and supported by a European company or distributor?**
2. **Does the company have experience, expertise and a long-term focus on foundation systems?**
3. **How many foundation clients are similar to us?**
4. **What is their financial strength and likelihood of long term success in this market?**
5. **How many full time staff support foundations?**
6. **How much do they invest in ongoing system development?**
7. **What is the availability of training and their record of support?**
8. **What do existing clients have to say?**

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Some Providers of Commercially Available Systems for European Foundations

Company	Foundation Clients Worldwide	Products and Services
AK Consultancies (UK)	**15** United Kingdom	Beneficiaries
EastiSoft (Bulgaria) www.eastisoft.com/oas	**None**	Online Application System (OAS)
Kindefonds (Germany) www.kinderfonds.org/	**150** Germany, Austria	Kindefonds Service Bureau
MicroEdge/NPO Solutions (US) www.microedge.com **Buzzacott** (UK) www.buzzacott.co.uk	**2,100+** Australia, Belgium, Bermuda, Brazil, Canada, Colombia, Costa Rica, France, Germany, Ireland, Israel, Kenya, Kosovo, Liechtenstein, Mexico, Monaco, Netherlands, New Zealand, Portugal, Puerto Rico, Switzerland, United Kingdom, US Virgin Islands	GIFTS, Essential GIFTS, MyGIFTS, Internet Grant Applications, ReviewerConnect, Customizer and other modules FIMS, FoundationPower, Internet Grant Applications, DonorCentral, Host*Net, Safety*Net, Donor Advised Funds

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Some Providers of Commercially Available Systems for European Foundations

Company	Foundation Clients Worldwide	Products and Services
SystemGruppe (Germany) www.systemgruppe.de	**25** Germany, Switzerland	Sysprof
UK Community Foundation Network (UK) www.communityfoundations.org.uk	**32** Australia, Ireland, United Kingdom	DIGITS

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Technology Resources

Articles about technology, industry trends, surveys, and links to references of special interest to foundations and nonprofits.

The site is updated regularly

www.iaa.com/resources.html

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RESOURCES

Sharing Good Ideas and Best Practices

Martin Schneiderman serves as Technology Editor, industry analyst, and regular contributing writer for *Foundation News & Commentary*, the membership publication of the Council on Foundations. This journal has a readership of 25,000.

In this section you'll find articles and presentations about technology, industry trends, surveys, and links to resources for foundations and nonprofit organizations.

Check our schedule of presentations on technology-related topics at international, national and regional conferences.

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PUBLICATIONS

Beyond Project Management: Create More Impact With What You Know

Best practices in knowledge and grants management (a.k.a. "Project Management" in Europe) for European foundations. Covers system capabilites, design and implementation, and European software and service providers. Presented at the 2004 European Foundation Center conference in Athens.

Seeking Safe Harbor

How some foundations and corporate grantmakers are using technology to facilitate compliance with the USA PATRIOT Act and the Executive Order intended to disrupt the support

Done My Computer

Key Things to Do When Implementing Knowledge Management Systems

1. **Make knowledge management an organization goal and ensure that you have a high level champion**
2. **Select a project leader and a team that represents all key organizational functions**
3. **Dedicate sufficient staff time and all of the right resources**
4. **Develop a phased project plan with realistic timelines – it will take longer than you think**
5. **Focus on process and organizational change, not the technology**
6. **Identify what kind of knowledge you need to make better decisions**

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Key Things to Do When Implementing Knowledge Management Systems

7. Analyze the way that you and your constituents access and use information and knowledge
8. Conduct surveys and interviews of your staff members and your different constituencies
9. Do research, conduct site visits and learn from the successes and failures of others
10. Develop written detailed prioritized new system requirements
11. Identify and select top-rated products and services from financially successful vendors who have other clients like you

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Key Things to Do When Implementing Knowledge Management Systems

12. **Establish agreement on common standards**
13. **Design and implement pilots to test hypothesis and learn critical implementation issues**
14. **Don't underestimate the ongoing resources required to identify, collect, review, classify and disseminate information**
15. **Focus and invest in staff training and ongoing professional growth**
16. **Publicize, educate and launch the new knowledge management system to ensure its use – do this on an ongoing basis**

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