

Donor Advised Funds: Building an Efficient Gift Processing System

SEHRISH SAEED

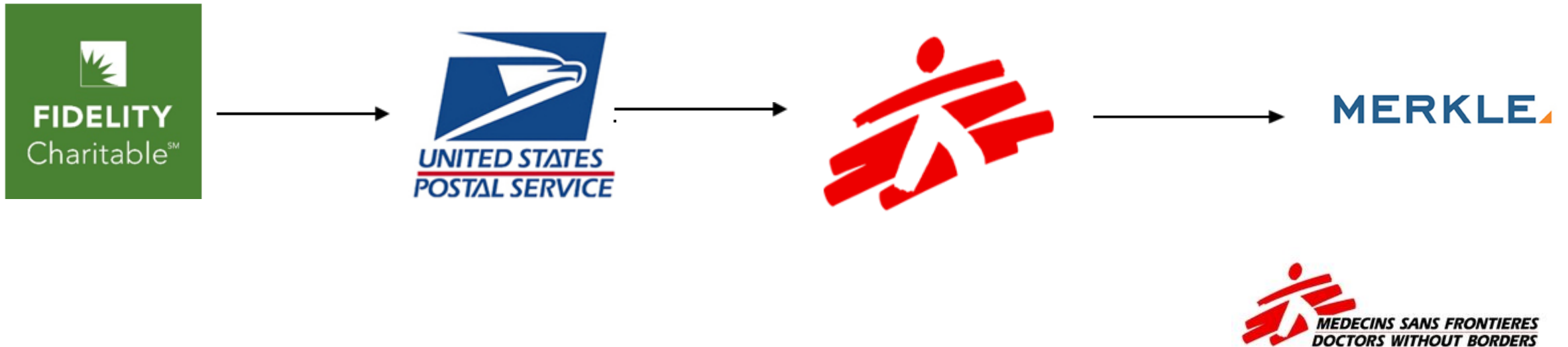
MARC ALMANZOR

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Background & Challenges

We needed to develop a solution that would automatically upload large sets of data to our database system.



Background & Challenges cont.

Tasks that are not automated can be costly!

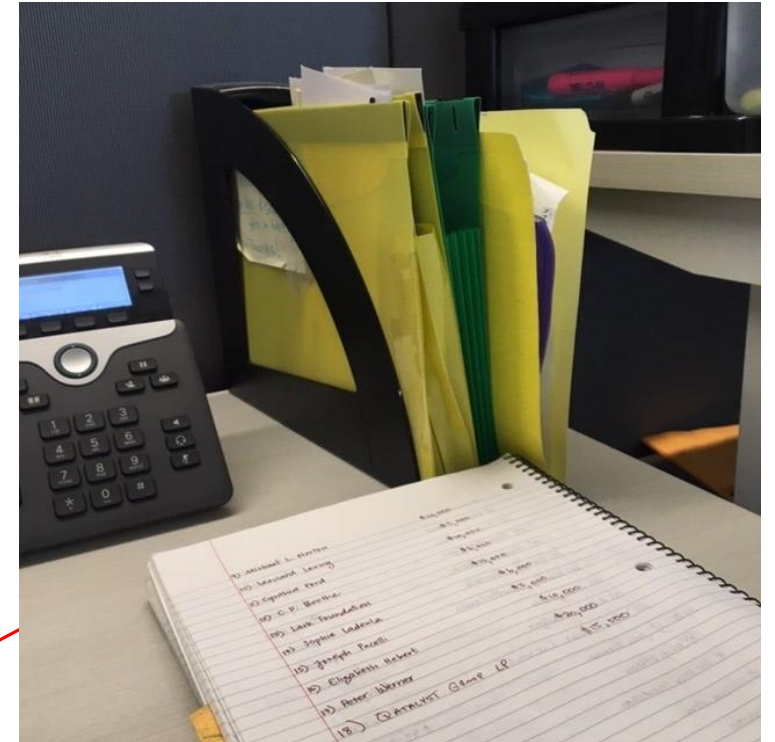
Time-consuming

Manual Entry

Keying Costs

Human Errors

This is where our team would place sorted Fidelity checks to be mailed out to the caging vendor.



Fidelity Upload Procedure

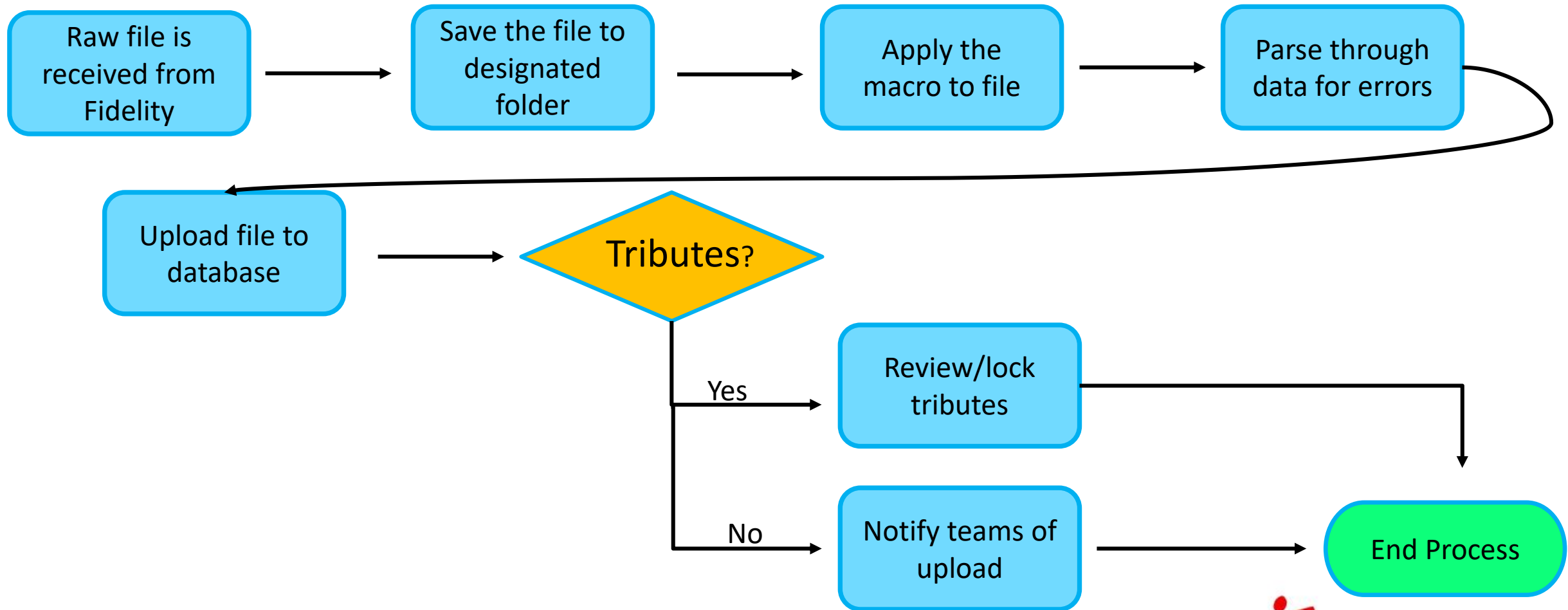
What is it?

- A semi-automated procedure to upload large sets of data to our CRM.

How did we do it?

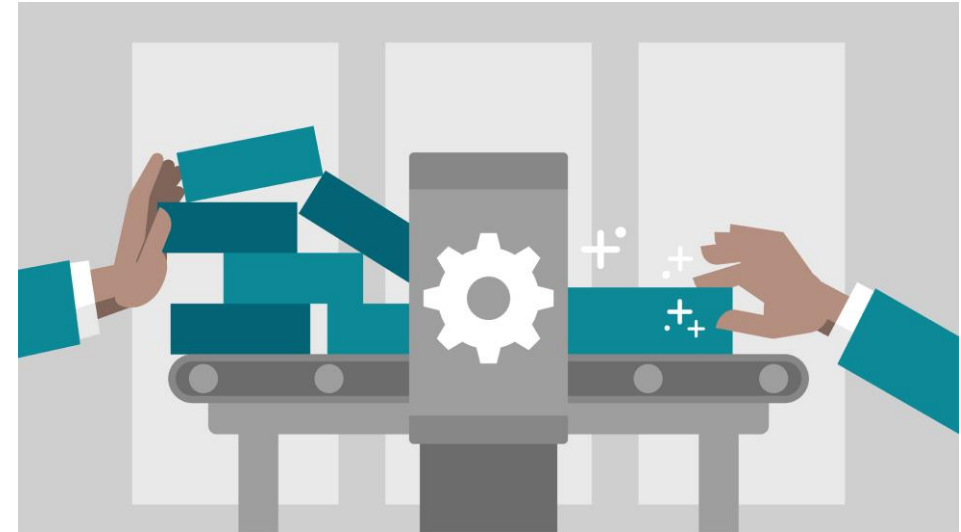


Procedure design & workflow



Fidelity E-File Transformation

We used Excel macros to remove excess data and format columns in the e-file to correctly map to the fields available in our CRM



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A1 Recommended By

	A	B	C	D	E	F	G	H	I	J	K	L
1	Recommended By	Grant Id	ACH Group Id	Effective Date	Grant Amount	Special Purpose	Giving Account Name	Addressee Name	Acknowledgement Address Line 1	Acknowledgement Address Line 2	Acknowledgement Address Line 3	Acknowledgement C
2	Online at FC	12345678	714294	2021-09-13	5000		Anonymous					
3	Online at FC	12345678	714294	2021-09-13	200		Marc Almanzor Giving Fund	Mr. Marc Almanzor	123 ABC Lane			New York
4	Online at FC	12345678	714294	2021-09-13	200	Designation: Where it's needed most	Sehrish Saeed Giving Fund	Ms. Sehrish Saeed	345 DEF Road			Washington
5	Online at FC	12345678	714294	2021-09-13	500	Designation: COVID 19	Marc Almanzor Giving Fund	Mr. Marc Almanzor	123 ABC Lane			New York
6	Online at FC	12345678	714294	2021-09-13	500	Designation: Where it's needed most	Sehrish Saeed Giving Fund	Ms. Sehrish Saeed	345 DEF Road			Washington
7	Online at FC	12345678	714294	2021-09-13	50	Designation: Afghanistan	Marc Almanzor Giving Fund	Mr. Marc Almanzor	123 ABC Lane			New York
8	Online at FC	12345678	714294	2021-09-13	50	Designation: Where it's needed most	Sehrish Saeed Giving Fund	Ms. Sehrish Saeed	345 DEF Road			Washington
9	Phone	12345678	714294	2021-09-13	357.55	Designation: Where it's needed most	Marc Almanzor Giving Fund	Mr. Marc Almanzor	123 ABC Lane			New York
10	Online at FC	12345678	714294	2021-09-13	200		Anonymous					
11	Online at FC	12345678	714294	2021-09-13	200	Designation: Where it's needed most	Sehrish Saeed Giving Fund	Ms. Sehrish Saeed	345 DEF Road			Washington
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Achievements

Objective	Tactics and initiatives to achieve objective	Outcome
Reduce time spent on sorting checks	Have checks sent via electronic file	Time spent on manually sorting through checks was eliminated
Eliminate manual entry of keying donations	Design a semi-automated procedure to upload gifts	Less keying errors & less human error
Save costs on keying and mailing checks to caging vendor	Process donations in house via Fidelity Upload Procedure	Reduction in the cost of mail being sent out



COVID-19 & Its Impact

March 2020 the pandemic hit, and most offices transitioned to remote work.

Many employees began WFH and were not present at the office to send and receive physical mail.

Many DAFs opted to send donations electronically like Fidelity



Having a procedure like the Fidelity Upload already designed served as a template for a new upload to accommodate the large influx of gifts coming in electronically from other DAFs.



Documentation, Project Management, & why it matters

Lessons Learned Document						
Date	Project Name			Project Lead		
Sl.No	+ / -	Phase	Category	Problem/Success Summary	Impact	Recommendation

1. Reduction in training time for employees
2. Helps easily identify areas of improvement
3. Accounts for changes in workflow
4. Assists in requirements gathering for future projects
5. Encourages knowledge sharing amongst different units

Using a lessons learned document can save time and energy when making improvements to a process. It can also help identify areas of weakness and provide recommendations for the future.



Takeaway & Outlook

1. Willingness to revisit old problems with new solutions
2. Cultivating a strong relationship with CRM vendor
3. Benefits of automating processes where possible
4. Donor centricity
 - Accurate data means donor gets ack'd properly.
 - Donor gets acquired and then cultivated for the second gift—can't do this as well without accurate data.



Outlook of DAF Giving

DAF giving is continuously increasing so if you haven't developed a data solution to uploading these gifts you will most likely need to sooner than later. According to NPT "Giving through DAFs increased 29.8 percent in first half of 2020."



About the Team



Sehrish Saeed is the Gift Processing Associate at Médecins Sans Frontières/Doctors Without Borders. Sehrish is passionate about helping organizations improve efficiency around gift processing.

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Marc Almanzor is the Senior Manager of Gift Processing at Médecins Sans Frontières/Doctors Without Borders and would love to connect with you about everything from DAFs to Twitch fundraising.

He can be reached at marc.almanzor@newyork.msf.org or on LinkedIn: <https://www.linkedin.com/in/marc-almanzor>.

Thank you!

QUESTIONS?

