

# Transforming Donation Processes with Powerful Digital Workflows

Making more time for donor recruitment, engagement, and retention is key to the success of any advancement department or nonprofit. Using the Formstack Platform, University of Houston improved their internal donation processes by removing paper and automating tasks.



## UNIVERSITY of HOUSTON

Established in 1927, the University of Houston empowers students in their pursuit of learning, discovery, leadership, and engagement. Located in a sprawling metropolis, the campus provides students with cutting-edge programs, including undergraduate, graduate, doctoral, distance, and continuing education studies.

<b>Industry</b>	<b>Customer Since</b>
Higher Education	2019
<b>Use Case</b>	<b>Products</b>
Donation Workflow	Forms, Documents, Sign

**Features**  
HIPAA Compliance, Document Routing, Automated Alerts

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## Challenge

University of Houston received more than \$1.1 billion in donations from nearly 1.5 million donors in 2019, and many of those gifts required a lot of manual processing. When donations would come in over the phone, the gift processing staff would manually fill out an Excel sheet to designate the type of gift and how it should be distributed. That data would then be shared through email, physically routed to the correct people, and manually entered into their systems. Once the data was compiled into a document, the data collector, relationship manager, and gift processor would approve and physically sign. The process was slow, paper-based, and often caused bottlenecks and data entry issues.

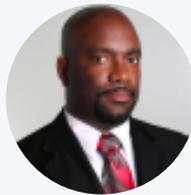
**1.5 Million**  
donors to the University  
of Houston in 2019

## Solution

The Advancement team created an entirely digital donation workflow using the Formstack Platform of **Forms, Documents, and Sign**. The gift preparer enters data into the **secure form**, which then **automatically generates** a finalized donation document. The document is **automatically routed** to the relationship manager and gift processor for approval and electronic signatures. Automated notifications ensure the document is signed quickly, eliminating bottlenecks and helping the process flow smoothly. Because the process was so easy to build and implement, other teams at the university are now looking into ways to adopt the **Formstack Platform** as well.

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**Formstack is one of the few platforms that actually is a platform. I had the ability to collect information, process the information, transform it, and then send it off for signing or stash it somewhere. One of the great things is the value of having all that interoperability in a single ecosystem, compared to getting all those services individually.**



**Mark Walcott**

Executive Director Advancement Systems  
at University of Houston

## The Results



Eliminated manual data entry and paper processes



Empowered employees to create their own digital workflows



Improved data security with HIPAA, PCI, and GDPR compliant processes



Consolidated software within their tech stack



Reduced process bottlenecks by automating reminders and document routing



Adopted digitization across multiple teams and processes

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