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.

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.

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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